Enterprise Key Performance Indicators (eKPI)

User Manual

An automated online system for tracking Key Performance Indicators and other Performance Measures for Palm Beach County

Contents

Overview

In 2017, ISS introduced a new business intelligence application – eKPI for capturing and reporting departmental performance measures. With the creation of the Strategic Planning & Performance Managemennt Division in the Office of Financial Management and Budget, this KPI-focused platform was updated to create the County's Performance Measures Reporting process, which started in 2019.   With collaboration between ISS and Strategic Planning & Performance Management, eKPI has become truly robust and provides departments the ability to create and track internal KPIs deemed important by management, including program workload, relevant operating statistics, cost data, and grant reporting requirements.

eKPI is a vast improvement over the existing SharePoint-based worksheets designed to simplify and, in some cases, automate the processes for collecting and reporting the underlying data for departmental performance measures.

The system can interface with other departmental systems and databases to automatically extract data for display in an eKPI, and also provides a very intuitive data entry screen for manually entering information. Also included in the application is a host of standard and customizable KPI Reports to improve performance reporting.

Additionally, the eKPI application provides a window into the department's performance through simplified data visualizations such as graphs and dashboards. These customizable dashboards offer intuitive drill-downs providing instant access to understandable metrics that are intuitive, informative, and actionable.

Locating the eKPI Application Online

The eKPI application may be found in the County's main intranet page: **pbcportal.pbcgov.org.** There is an eKPI tab at the top of the page, as well as on the column titled "Quick Links" on the left of the page. The username and password for eKPI is the same as the SIM information used to log into County computers. However, access to the application for data entry must be granted by ISS via a request from the Senior Strategic Planning & Performance Analyst in OFMB.

Detailed information about the County's *overall Strategic Plan, Mission, Vision and six Strategic Priorities* may be found in the **Strategic Planning and Performance Management Division's intranet page: https://pbcportal.pbcgov.org/ofmb/SPPM/default.aspx.**
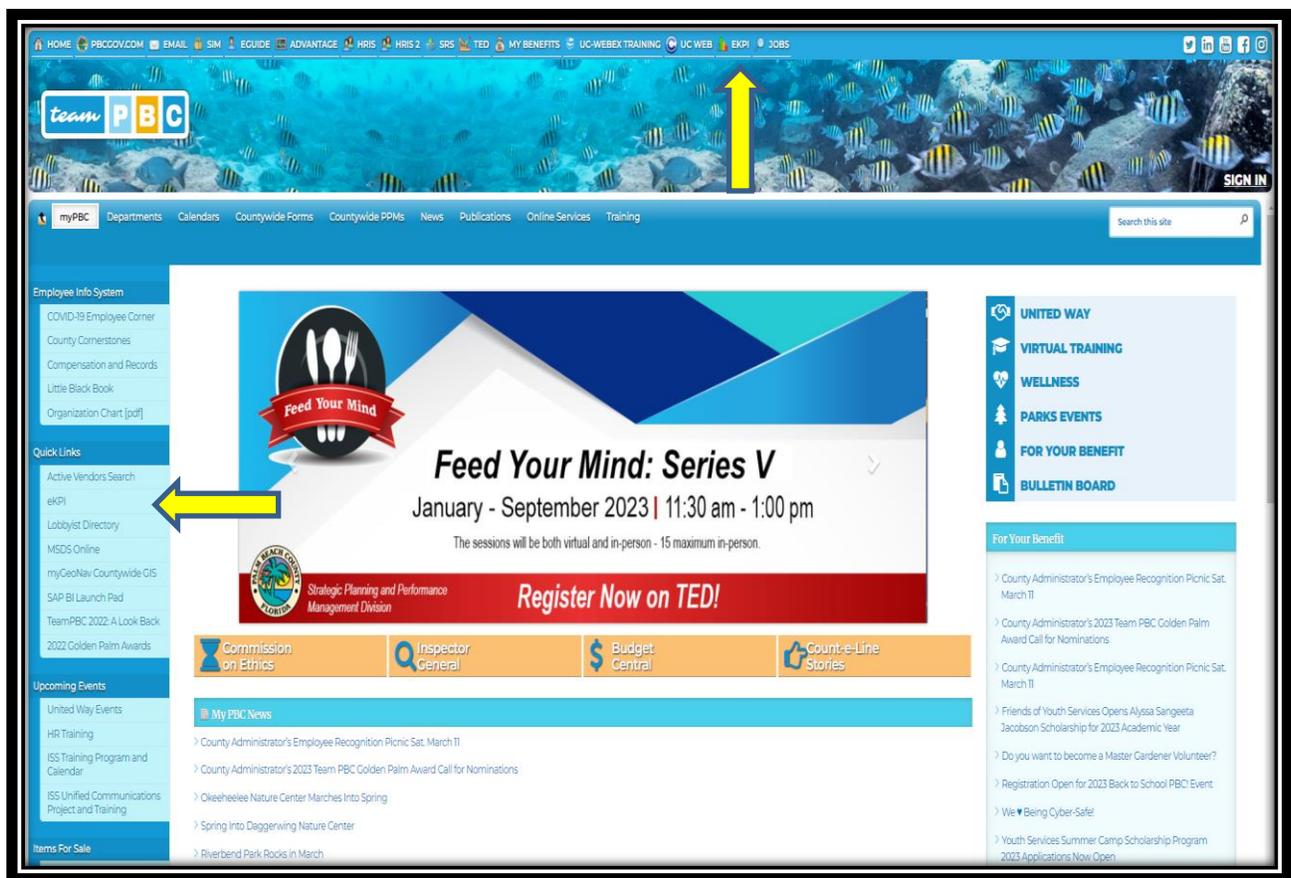
Strategic Planning and Performance Management is in the Governmental Center, located at:

301 North Olive Avenue, 7th Floor, West Palm Beach, FL 33401

Keith A. Clinkscale, Division Director: kclinkscale@pbcgov.org

Marcela C. Millett, Sr. Strategic Planning Performance Analyst: mmillett@pbcgov.org

Login

1. Click on http://pbc/ekpi
2. Login with HRIS/SIM user id password

Performance Indicator Screen

Provides listing of all KPIs included in the OFMB Performance Measurement Book. Provides departments the ability to create and track internal performance measures deemed important by management, including program workload, relevant operating statistics, cost data, and grant reporting requirements**.**

1. Click on KPIs on the menu, the following screen appears

2. Click on "**Add New**" button at the bottom of the Performance Indicators screen, and the "Add New Performance Indicator" Screen appears (see next page).

3. Click on the "**Department Info**" button at the bottom of the Performance Indicators screen and be directed to a Budget Book Form Search screen to provide access to the forms to be completed for the Budget Book.

4. Enter all the required fields marked with an asterisk (*).

5. Choose the **Strategic Priority**(ies) associated with the KPI, from the list (can be multiple), if any: **Economic Development, Housing/Homelessness, Environmental Protection, Infrastructure, Public Safety, Substance Use and Bahvior Disorders**.

- **Centralized/Supporting Departments (Administration, Equal Opportunity, ISS, Legislative Affairs, Public Affairs, Purchasing) automatically have "Centralized/Supporting Department" generated in the Strategic Priority section but can choose more options as appropriate per KPI.**

6. Choose how you want to report your KPI (Monthly, Quarterly, and/or Yearly).

7. A department and/or division may create as many KPI's as wanted, but not all KPI's will be reported to Management Team, in Budget Book, or for Performance October.

8. Mark the KPI "Yes" if you want the new performance indicator to be identified as a "top" KPI, or **"Key KPI". These should be the KPI's that best showcase a department's success or need for improvement (no limit on how many Key KPI's created, but a** maximum of 10 KPIs are allowed for reporting to the Management Team Meeting in May and the Budget Book Report.

    a. For the "**Print Management Report"** you **must** select one of the frequency options from the drop-down list box (Monthly, Quarterly, or Yearly).

    b. For the "**Print Only Key KPI(s) Report**" **(Scorecard),** enter the RAG values for min/max, target, and goal. Enter a monthly, quarterly, and(or) yearly RAG when reporting for those time intervals.
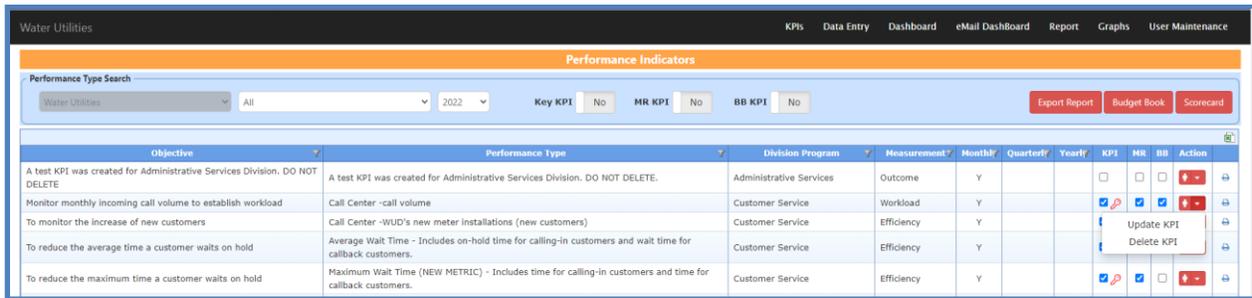

9. **In order to choose Budget Book KPI or Management Report KPI, KPI must be chosen as Key KPI first.**

10. If you uncheck Key KPI, it will uncheck Budget Book and Management Report KPI as well.

11. Mark the Budget Book KPI "Yes" if you want the new performance indicator included in the **"Budget Book."**

12. Choose the Preferred Trend (Down, Up)

** RAG numbers should go from smallest to largest if trend is going up, and from largest to smallest if trend is going down.

13. Click on the "**Save**" button to save the data. Click on the "**Close**" button to close the pop-up window.
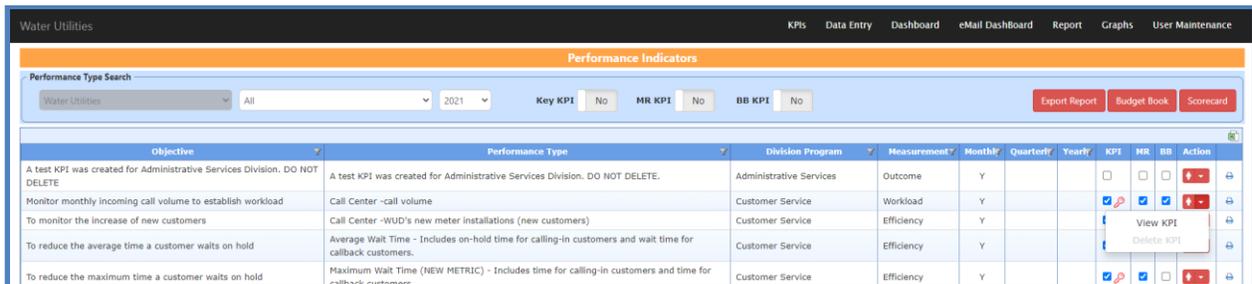
Update / Delete

1. To update/delete the Performance Indicator, click on the dropdown icon under "**Action**" ➕ ▼ the following screen appears. Click the action you wish to perform.
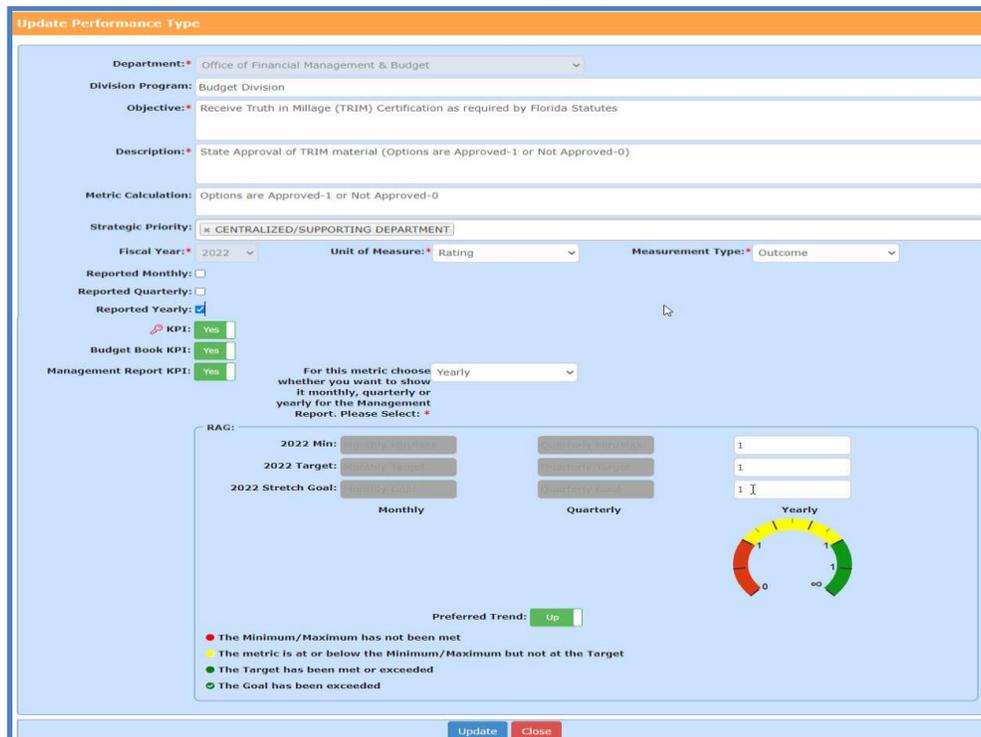

Note: You can update/delete KPI only for current Fiscal Year. For other years, you can only view KPI

2. Click on "**Update KPI**" and make the changes you want to the KPI.

    a. Click on **"Update"** to Update and Save the KPI.
    b. Click on "**Scorecard"** to view/print a report of this KPI only.
    c. Click on "**Close**" to close the popup screen.

3. Click on "**Delete KPI**," and a message is displayed to confirm that you want to delete this performance indicator.
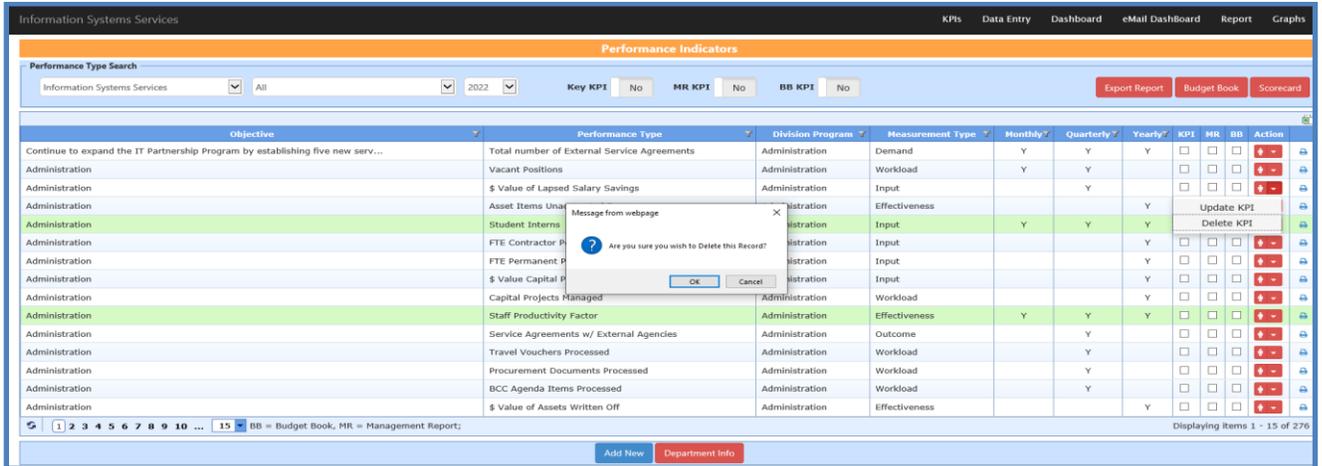
a. Click **OK**, and a "Record deleted" message will appear.
b. Click **Cancel** to stop the performance indicator from being deleted.

Note: In order to choose Budget Book KPI or Management Report KPI, KPI must be chosen as Key KPI. A messge will pop up when you try to select Budget book KPI without selecting Key KPI.
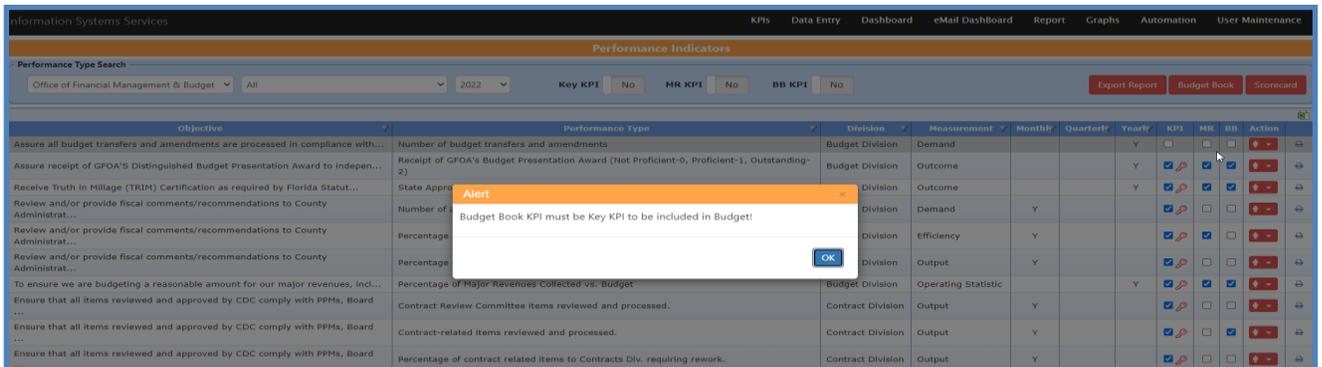
Note: If you uncheck Key KPI, it will also uncheck Budget Book and Management report KPI and show you below message:
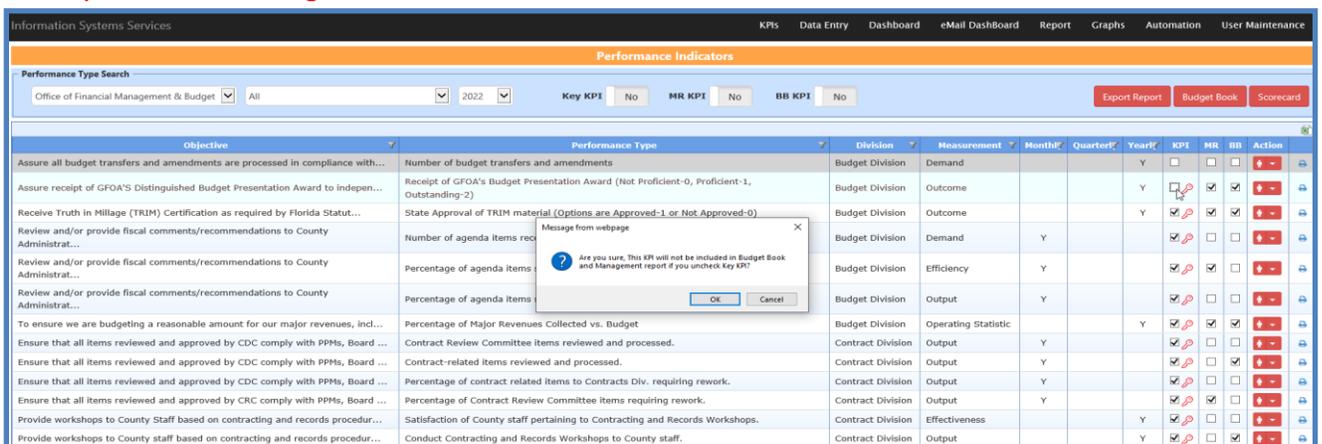
Reporting Options:

Export Report Button

1. Click on the "**Export Report**" [Export Report] button or the Excel [icon] icon to export the data on the screen into an Excel report.

Scorecard Button

1. Click on the **"Scorecard"** [Scorecard] button to display and print the Scorecard Report for performance indicators displayed. You will have the option to Cancel, or Select the Division Program and one of All Performance Indicators, Management Report, Key Performance Indicators, or Budget Book KPIs as shown below:

See an example of a Performance Report (Scorecard) at the end of this guide.

Note: The Print Management Report will only print reports for 10 Key KPI's identified, along with only ONE frequency chosen (Monthly, Quarterly or Yearly).

Budget Book Button

1. Click on the **"Budget Book"** [Budget Book] button to display and print the Budget Book Report for the Budget-Book-only Performance Indicators displayed. You will be able to Cancel, Print the Objectives/Performance Measures or Print Budget Book management report as shown below:

Information Systems Services - Budget Book Report ✕

Please select the report

Cancel | Ok, Print Objectives/Performance Measures | Ok, Print BB Mgt Report

---

Office of Financial Management & Budget — Palm Beach County, FL

PERFORMANCE MEASUREMENTS	Actual FY 2021	Actual FY 2022	Target FY 2023	Target FY 2024
Conduct Contracting and Records Workshops to County staff. [1]	3	7	5	5
Contract-related items reviewed and processed. [2]	996	1,154		
Debt per capita (overall) [3]	435	390	529	529
Dollars collected by external efforts [4]	526,769.24	162,365.86	770,000	770,000
Non Ad-Valorem Revenue Bond Debt Service coverage [5]	5.78	5.79	5.22	5.22
Number of performance management/ strategic planning trainings, courses or department presentations [6]	208	196	84	84
Percentage of Major Revenues Collected vs. Budget [7]	103.8	113.83	96	96
Percentage of inventoriable assets confirmed	98.68	na	99	99
Receipt of GFOA's Budget Presentation Award (Not Proficient-0, Proficient-1, Outstanding-2)	1	1	1	1
Records Destruction request reviewed & processed. [8]	73	57		
State Approval of TRIM material (Options are Approved-1 or Not Approved-0)	1	1	1	1

Comments
1. In FY20, due to the Covid-19 pandemic, workshops were put on hold. One class was provided in FY20 to one department due to new staff coming onboard. FY21 continued to be negatively impacted by the pandemic. Typically there are 4-6 trainings held per year (between March and September).
2. Min/Max, Target, and Goal are not in department's control and are dependent upon other departments' needs. Monthly/Yearly figures are tracked for informational purposes only.
3. Improvement in these ratios is the result of continued growth in population coupled with a decrease in the amount of debt outstanding.
4. External efforts/sources of collections refer to a third party collection agency such as Penn Credit. In FY20, the Covid-19 pandemic had significant impacts on the ability to collect funds. FY21 and FY22 targets were adjusted to account for Covid-19 recovery efforts, although actuals for FY21 show a continued impact from the pandemic.
5. This metric continues to exceed targets and improvement trends in these ratios is the result of continued growth in population coupled with a decrease in the amount of debt outstanding.
6. Performance Management and Strategic Planning took advantage of various virtual platforms to hold various presentations, workshops and trainings throughout many departments in the County. Several departments asked for assistance with creating cross-divisional teams, updating core values, and providing guidance on creating meaningful KPIs. Feed Your mind also returned from a Covid-induced hiatus in September 2021. In preparation for the end-of-year presentation to the BCC, the cross-departmental teams increased number of meetings and this division was able to attend them virtually or in-person. Targets for FY22 and FY23 have not increased due to meetings and workshops returning to in-person settings, and 2-person staffing capacity to hold such events.
7. Due to Covid-19 the FY21 Budget was lowered and revenues recovered more quickly than anticipated to be more inline with FY19 figures.
8. Min/Max, Target, and Goal are not in department's control and are dependent upon other departments' needs. Monthly/Yearly figures are tracked for informational purposes only.

🖶 Print

Office of Financial Management & Budget — Palm Beach County, FL

DEPARTMENT SUMMARY

MISSION STATEMENT
To manage, monitor, and maintain financial resources to achieve outstanding results.

Budget Division
The Budget Division prepares and administers the County's annual budget in accordance with Florida Statutes and policies of the Board of County Commissioners (BCC), and fulfills an oversight role on behalf of County Administration and the BCC. The division also provides general guidance and assistance to County departments, members of the public, media representatives, and other government agencies. Primary services include preparing the County's annual operating and capital budgets; analyzing and processing changes to the adopted budget; planning for future operating and capital requirements; reporting financial trends and issues, major project status, and departmental performance measurement data; reviewing and commenting on the fiscal impact of Board agenda items; and providing financial expertise, assistance, and information to the Board, Administration, departments, citizens, and media representatives.

Contract Development & Control Division
The Contract Development & Control (CDC) Division serves as the clearing house for coordinating all formal contracts and related documents to ensure compliance with BCC policies, as well as, State Records Management requirements. To carry out its mandate, the Division facilitates the initiation, completion, and approval process of contract related items through the review of contracts, agenda items, Request for Proposals (RFP), bid documents and Change Orders, Work Orders, Consultant Service Authorizations, surety bonds, and letters of credit. A database is maintained for tracking, updating, and monitoring all ad valorem contracts and related items approved by the BCC. Reports are provided in relation to change activity for approved contracts. The Division is represented or serves as chair for many countywide committees. Services include records management compliance for the Board as required by Florida Statutes.

Financial Management Division
The Financial Management Division includes Debt Management, Fixed Assets Management (FAMO), the Impact Fee Program, and the Revenue Collection Program. Primary services include debt management and planning for future financing needs, recording acquisitions and disposals of County owned property, conducting periodic inventories and reconciliations of fixed assets, managing the surplus asset disposal program and the Thrift Store, ensuring the accurate calculation of impact fees, reviewing impact fee refund requests and conducting impact fee compliance reviews of municipalities, providing financial analysis support for Department of Housing and Economic Sustainability (DHES) Housing and Urban Development (HUD) loan program and selected Purchasing RFPs, maximizing the collection of monies due to the County, and developing related countywide financial policies and procedures.

Strategic Planning and Performance Management Division
The Strategic Planning and Performance Management Division supervises all activities related to the long-term strategic plan and assists the BCC, Management Team, department directors, and staff with the development of long-term goals, objectives, strategies, and actions. The division assists the administrative team with the development, adoption, and implementation of initiatives supporting countywide strategic planning, continuous improvement efforts, process improvement, and performance management. The division leads the performance management processes which include program evaluation and other analytical activities designed to assess the efficiency of County services in achieving the County's long-term goals and objectives. The division also reports departmental performance measurement data in the County's annual budget book.

Office of Financial Management & Budget — Palm Beach County, FL

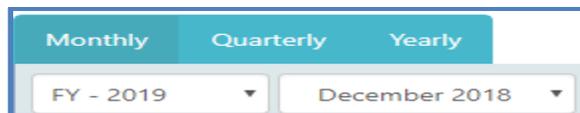| PERFORMANCE MEASUREMENTS	Actual FY 2021	Actual FY 2022	Target FY 2023	Target FY 2024
Conduct Contracting and Records Workshops to County staff. [1]	3	7	5	5
Contract Review Committee items reviewed and processed.	273	271		
Contract-related items reviewed and processed. [2]	996	1,154		
Debt per capita (overall) [3]	435	390	529	529
Dollars collected by external efforts [4]	526,769.24	162,365.86	770,000	770,000
Dollars collected by internal efforts	824,421.88	827,397.69	250,000	250,000
Non Ad-Valorem Revenue Bond Debt Service coverage [5]	5.78	5.79	5.22	5.22
Number of County Departments/Offices actively using eKPI	31	31	28	28

Performance Measurement Data Sheet

This intuitive data entry screen for manually entering information. The system can interface with departmental systems/databases/APIs for automating the processes; for data collection and reporting; to automatically extract data for display in an eKPI.

NOTE: **Enter the data in the Performance Measurement Data Sheet before you run the Scorecard Report.**

1. Click on **Data Entry** from the black Menu Ribbon at the top of the screen.
2. The Performance Measurement Data Sheet displays as shown below.

3. The Performance Measure Data Sheet is reported Monthly, Quarterly or Yearly.

4. Enter the Current Value.
5. The Unit of Measure will automatically be displayed from the KPI but can be changed.
6. Click on the "**Save**" button to save the data BEFORE inputting the next data value.
7. **NOTE**: The **green** highlighted data uploads in the system via the daily automated batch jobs through ISS support. (This input data cannot be changed or updated)
8. Click on the comment icon to add comments for a reporting period to report any aberrations/deviations (staff shortage, hurricane, etc). The icon will turn green on the data entry page once commentary is saved indicating that comments were entered for this KPI.

9. Click on the paper clip icon to add one or more attachments and save. The icon will turn green on the data entry page, indicating that there are attachments added to this KPI.

NOTE: **If there is a no data entered in the current value, please enter 'NA' (not the number zero, unless that is the true data value being captured) in the current value field before saving any comment or attachment .**

10. Click on the graph icon to see detail information of that particular Performance Measure
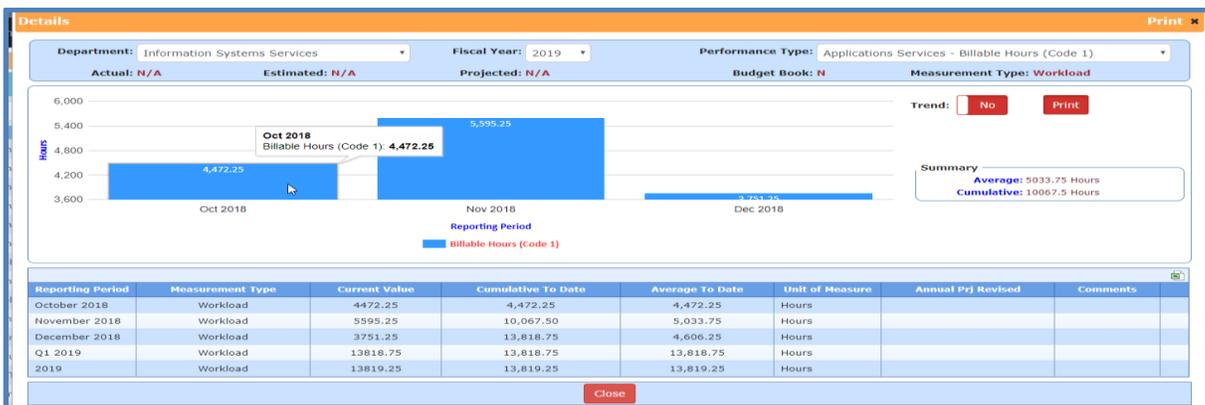
Scorecard Report

NOTE: All the performance Indicators marked with a key are graphed on the **Key PERF Report.   Make sure you enter the max, target and goal information on the Performance indicator screen.**

11. Click on the "**Scorecard**" button the following popup window appears

12. Click one of the options to print the report
    a. Click **All Performance Indicators** to print a complete report of ALL Performance Indicators, whether Key KPI's or not.
    b. Click **Print Management Report** to print a Maximum of 10 KPI's with one chosen frequency (Monthly, Quarterly, or Yearly). This is used for the Management Team Meeting in May and is associated with supplemental and budgetary requests.
    c. Click **Only Key KPI(s)** to print a full report of each of the Key KPI's along with the summary page.
    c. Click **Budget Book KPI(s)** to print only the KPI(s) chosen for the Budget Book.
        i. This is NOT the Budget Book report that pints in the Budget Book, although it looks similar. The Budget Book Report is printed from the "Department Info" page found on the homescreen when first loging into eKPI.

Note: All KPI's selected for Management Report and Budget Book MUST be selected as Key KPI's. If the KPI is not important enough to be a top (or Key KPI) for the department, then it's not important enough to be in the Management Report or Budget Book.

Sample Report (option "a" on previous page)

INFORMATION SYSTEMS SERVICES

PERFORMANCE REPORT
February 2022

Mission:
To build and optimize the County's information technology (IT) infrastructure as a secure, reliable, and affordable resource for automating work processes, enabling management decision-making, and providing public access to County information and programs. Centralized oversight of technology resources will be established through enterprise policies, standards, strategic plans, and governance committees.

ECONOMIC DEVELOPMENT

HOUSING/HOMELESSNESS

ENVIRONMENTAL PROTECTION

INFRASTRUCTURE

PUBLIC SAFETY

SUBSTANCE USE & BEHAVIOR DISORDERS

CENTRALIZED/SUPPORTING DEPARTMENT

Performance Management Office

FY 2018 Highlight & Accomplishments

- Awarded Top Ten national ranking in 2018 Digital Counties Survey.
- Implemented and upgraded multiple internal systems including: Phase II of the Medical Examiner Case Management System, Phase II of eFDO System, upgrade to PAPA website and online applications, Online Public Records Request System, Summer Camp Database, HRIS replacement for legacy TimeServer application, and Countywide Email upgrade to Microsoft Exchange 2016.
- Added three new agreements for IT services provided by ISS to external agencies.
- Implemented new Countywide Interactive Voice Response (IVR) System.
- Selected new email archiving system and began converting archive Outlook records.
- Began conversion of former enterprise data center to office and cubicle work spaces.
- Increased data storage capacity with implementation of new enterprise data storage platforms.
- Provided critical staff support to Supervisor of Elections during multiple elections.
- Prepared an updated strategic plan for ISS Department for 2019 through 2021.
- Implemented capability for periodic security tests of employee phishing vulnerability.
- Installed 445 strand miles of fiber optic network cabling.
- Phase out of leased voice and data circuits reduced AT&T costs by $360,500 annually.
- Revised Computer Operators' work schedules to reduce overtime by almost $38,000 annually, and reassigned a vacant position for increased efficiency.
- Implemented Sharepoint Search as a replacement for Google Search for www.pbcgov.com.
- Installed Cylance Protect on all ISS managed agencies desktops as an endpoint threat protection in real-time as well Trend Micro Deep Security on all enterprise servers.
- Refreshed enterprise wintel server hardware at Emergency Operations Center (EOC) and Operations Support Center (OSC).
- Upgraded OpenScape Contact Center to version 9 for more reliability and enhanced features.
- Maintained 16 Student Intern positions and hired two former Student Interns as full-time ISS employees.

FY 2019 Emerging Issues

- Some ISS staff will be displaced by renovations to the fourth floor in the Governmental Center and temporary office space must be identified.
- Competing capital funding priorities must address the need to upgrade components of the County's aging fiber-optic and wireless networks.
- Increased public interest and scrutiny of government operations and procurement practices underscore the need for countywide implementation of applications such as eKPI for performance management and eCMS for contract management.
- Cyber security remains a top priority in the face of increased threats of data theft and system disruption.
- Integrating the Traffic Division's fiber-optic network into the County network and recruiting the School District as a shared services partner could save substantial taxpayer dollars.
- Reorganization of the IT support function for Court Administration establishes a dotted-line reporting relationship of the Court Technology CIO and the ISS CIO.
- Opportunities for additional IT consolidation, if pursued, could reduce costs and complexity.
- Aging work force with numerous long-term employees will require the ability to attract highly skilled workers and implement succession planning.
- Retirement of long-term CIO and other management positions will usher in new leadership for the ISS Department.

INFORMATION SYSTEMS SERVICES DASHBOARD - FEBRUARY 2019 - Monthly

| Applications Services	Max	Target	Goal	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
% Completion of eFDO Project				51	52	53	54	55							
% Completion of ME Case Management System				77.2	78.6	80	81.4								
% Completion of ePZB Online Submittal Module				55	60	65	71								
Applications Services	**Min**	**Target**	**Goal**	**Oct**	**Nov**	**Dec**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**
% SLAs Met for Initial Response	89	95	97	97.18	97.09	97.39	98.62	97.66							
% SLAs Met for Restoration	89	90	95	96.24	96.51	98.69	96.79	97.08							
Staff Productivity Factor	70	75	80	82.99	87.61	74.62	79.47	48.63							
Applications Services	**Max**	**Target**	**Goal**	**Oct**	**Nov**	**Dec**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**
Mean Time to Problem Restoration (Hours)	35	30	25	28.18	31.04	31.78	24.24	18.74							
Past Due Problem Tickets	10	6	4	6	5	4	3	4							

- 🔴 The Minimum/Maximum has not been met
- 🟡 The Metric is at or below the maximum but not at the Target
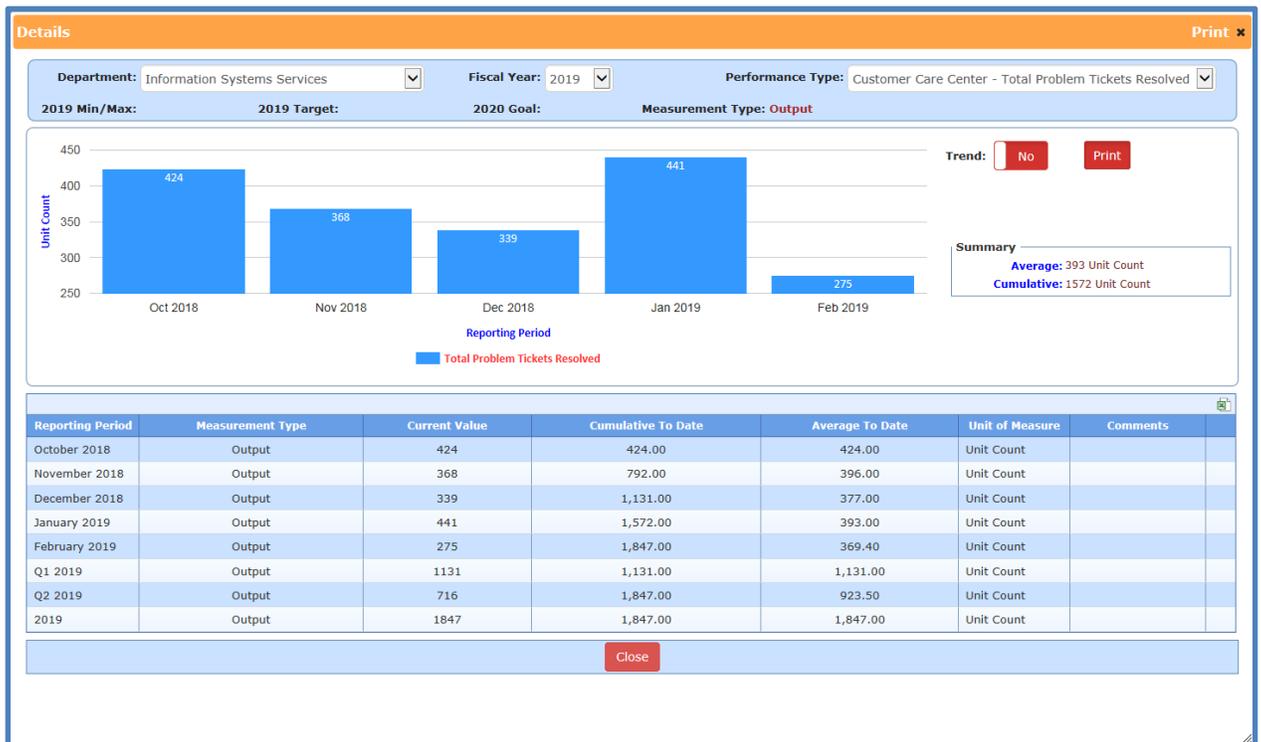- 🟢 The Target has been met or exceeded
- ✅ The Goal has been exceeded

Information Systems Services Performance Management Office February 2019

1

INFORMATION SYSTEMS SERVICES DASHBOARD - FEBRUARY 2019 - Quarterly

Applications Services	Max	Target	Goal	QTR 1	QTR 2	QTR 3	QTR 4
% Completion of eFDO Project				52	109		
% Completion of ME Case Management System				78.6	81.4		
% Completion of ePZB Online Submittal Module				60	71		
Applications Services	**Min**	**Target**	**Goal**	**QTR 1**	**QTR 2**	**QTR 3**	**QTR 4**
% SLAs Met for Initial Response	89	95	97	97.21	98.2		
% SLAs Met for Restoration	89	90	95	97.03	96.92		
Staff Productivity Factor	70	75	80	81.23	42.51		
Applications Services	**Max**	**Target**	**Goal**	**QTR 1**	**QTR 2**	**QTR 3**	**QTR 4**
Mean Time to Problem Restoration (Hours)	35	30	25	30.12	21.82		
Past Due Problem Tickets	30	18	12	15	7		

- 🔴 The Minimum/Maximum has not been met
- 🟡 The Metric is at or below the maximum but not at the Target
- 🟢 The Target has been met or exceeded
- ✅ The Goal has been exceeded

Information Systems Services Performance Management Office February 2019

2

⊞ DEPARTMENT-WIDE - Customer satisfaction rating

	FY	Min	Target	Goal	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Customer satisfaction rating	2019	90	95	100	93.5	100	94.54	97.81	95.24	97.18	97.7	97.26	98.53	99.03	97.4	98.19
	2020	85	90	95	98.3	100	96.36	95.13	96.77	94.63	98.61	95.71	95.72	98.49	97.11	95
	2021	85	90	95	100	95.55	97.77	100								
	2022	85	90	95												
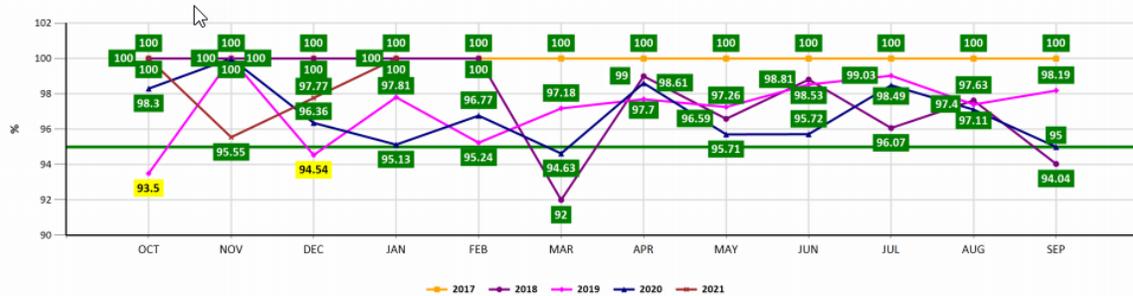
Description	Metric Calculation
Achieve a customer satisfaction rating of 95% or greater *Customer satisfaction rating*	

Comments/Narrative

🔴 The Minimum/Maximum has not been met   🟡 The Metric is at or below the minimun/maximum but not at the Target   🟢 The Target has been met or exceeded

Information Systems Services Performance Management Office February 2022

⊞ SERVICE LEVEL AGREEMENTS - Percentage of problem tickets resolved upon first intake - Quarterly

	FY	Min	Target	Goal	QTR 1	QTR 2	QTR 3	QTR 4
Resolve 20% or greater of problem tickets upon first intake *Percentage of problem tickets resolved upon first intake*	2019	15	20	25	16.05	13.56	15.87	12.7
	2020	10	15	20	15.06	15.3	12.25	11.15
	2021	10	15	20	13.69			
	2022	10	15	20				

Description	Metric Calculation
Resolve 20% or greater of problem tickets upon first intake *Percentage of problem tickets resolved upon first intake*	

Comments/Narrative

🔴 The Minimum/Maximum has not been met   🟡 The Metric is at or below the minimun/maximum but not at the Target   🟢 The Target has been met or exceeded

2

Information Systems Services Performance Management Office February 2022

SERVICE LEVEL AGREEMENTS - Percentage of problem tickets resolved upon first intake - Yearly

	FY	Min	Target	Goal	Year
Resolve 20% or greater of problem tickets upon first intake *Percentage of problem tickets resolved upon first intake*	2019	15	20	25	🔴 14.5
	2020	10	15	20	🟡 13.36
	2021	10	15	20	🟡 13
	2022	10	15	20	

Description	Metric Calculation
Resolve 20% or greater of problem tickets upon first intake *Percentage of problem tickets resolved upon first intake*	

Comments/Narrative

🔴 The Minimum/Maximum has not been met   🟡 The Metric is at or below the minimun/maximum but not at the Target   🟢 The Target has been met or exceeded

Information Systems Services Performance Management Office February 2022

Example of how Strategic Priority icons appear at top left of Scorecard when selected

IT SECURITY - Malicious emails blocked by Proofpoint - Total Percentage - Quarterly

	FY	Min	Target	Goal	QTR 1	QTR 2	QTR 3	QTR 4
Achieve 97% or greater of blocked malicious email communication *Malicious emails blocked by Proofpoint - Total Percentage*	2019	90	95	97	🟡 93	🔴 83.7	🔴 82.6	🔴 84.37
	2020	90	95	97	🔴 85	🔴 83.5	🟢 96.55	🟢 96.75
	2021	90	95	97	✅ 97.8			
	2022	90	95	97				
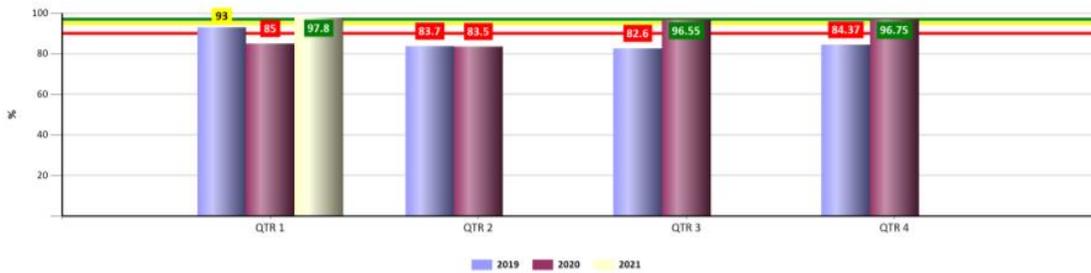
Description	Metric Calculation
Achieve 97% or greater of blocked malicious email communication *Malicious emails blocked by Proofpoint - Total Percentage*	

Comments/Narrative

🔴 The Minimum/Maximum has not been met   🟡 The Metric is at or below the minimun/maximum but not at the Target   🟢 The Target has been met or exceeded

Information Systems Services Performance Management Office February 2022

Report

1. Click on Report on the menu, the following screen appears

2. Enter the filter you want for your report and then click on the "**Search**" button

3. The following screen appears

4. Click on the graph icon in the KPI column to see detail information about the graph

5. Choose "Yes" for the Trend to see a Trend Analysis chart
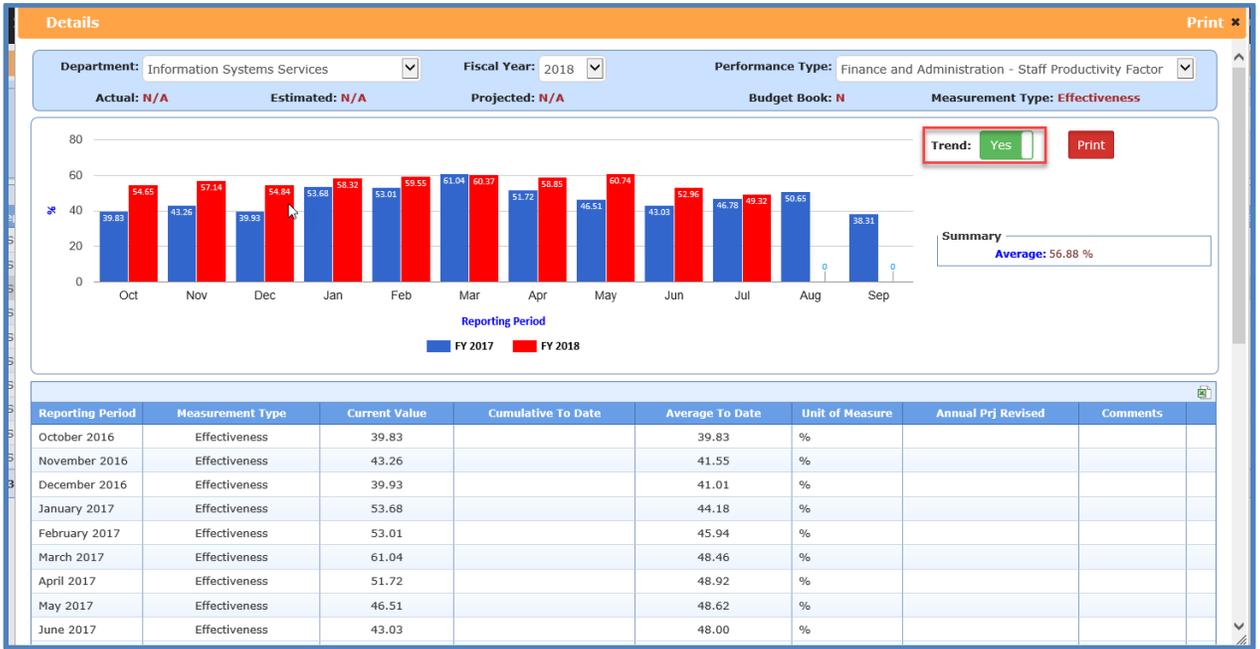
6. Click on "**Print**" if you want to print the detail report.

KPI Dashboard

NOTE: **The graphs on the dashboard will only populate after you entered the data for any of the KPIs. Go to Page 4 for steps to enter your KPIs and then set up your graph.**
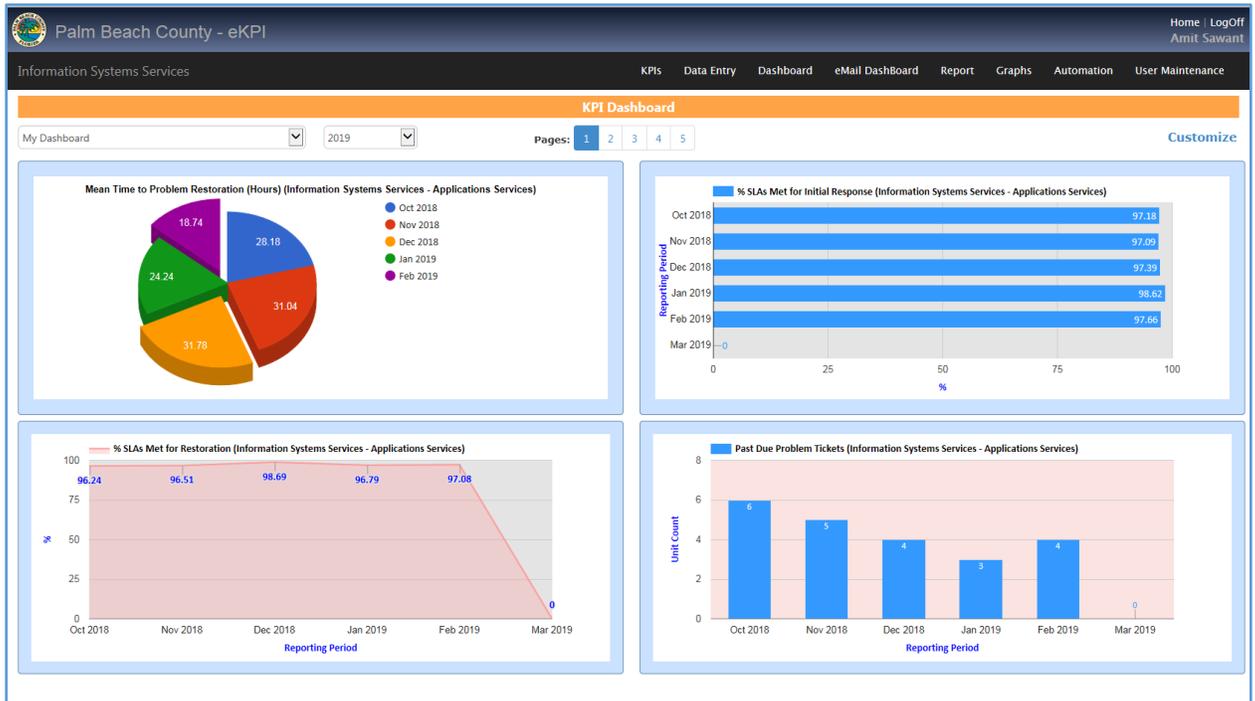
The KPI dashboard provides a window into the department's performance through simplified data visualizations such as graphs.

1. To change the graph click on the customize button on the screen.
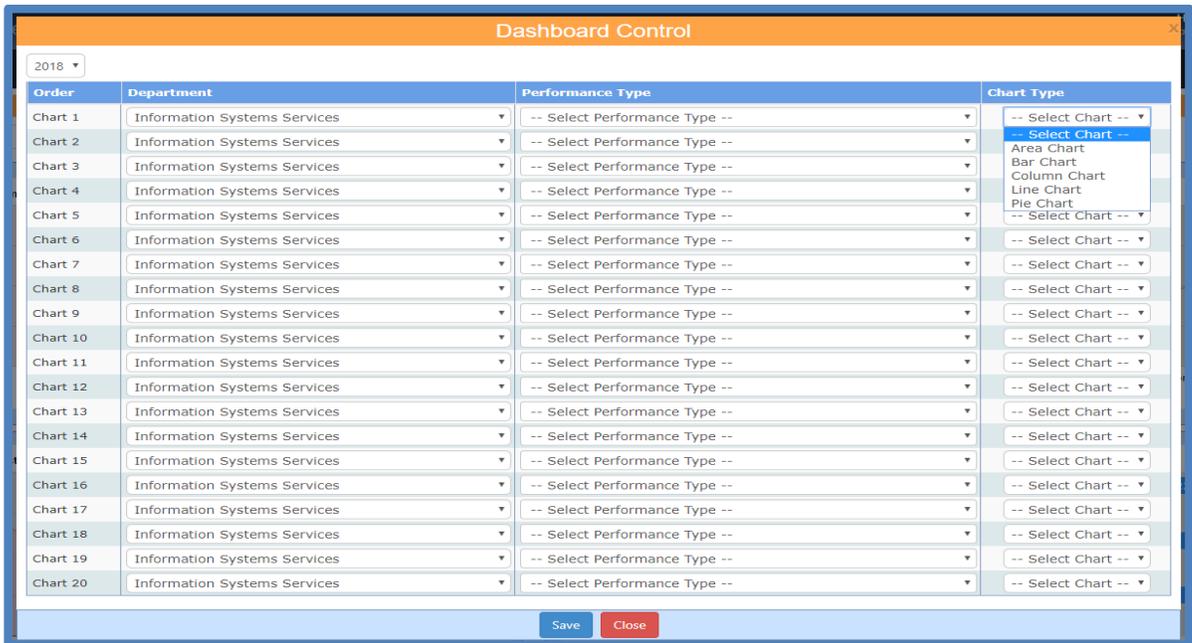
2. Choose the chart type from the "**Chart Type**" dropdown list

3. Click on the "**Save**" button to save the chart type. Click on "**Close**" to go back to the graphs

4. Intuitive drill-downs providing instant access to understandable metrics that are intuitive, informative, and actionable. (Click on any parts of the graph to see the details)
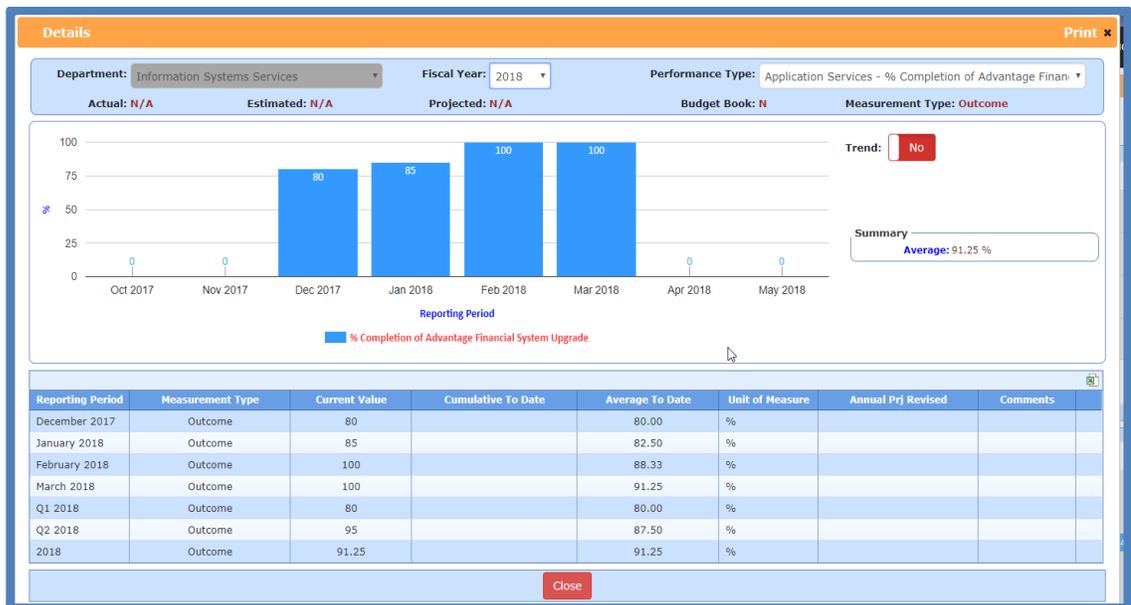
Email Dashboard

1. Click of the eMail Dashboard from the menu item
2. The Email dashboard screen appears

3. Enter the person(s) email(s) that you want to share your dashboard
4. Enter the subject information
5. Choose the frequency, day and time
6. Check the checkbox under "Active" to mark which of the recipient you want to share your dashboard with logging into the application.
7. A batch job is run daily to send the link to the recipient(s) email to share your dashboard

The Budget Book

Budget Book Form Search:

1. Form Type: Department Summary Screen. (Click from drop-down list will display this page)

> a. Click the **Add New** button to display the Add Department Summary Narrative screen as shown below. The Fiscal Year is auto-populated. The Title and Narrative fields are required.
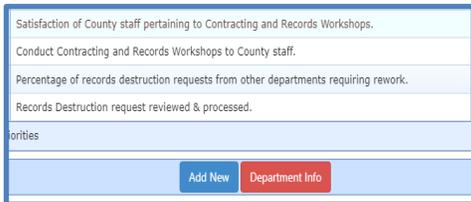
Click on the red "Department Info" button found at bottom of main KPI Performance Indicators screen to get to Budget Book screen.
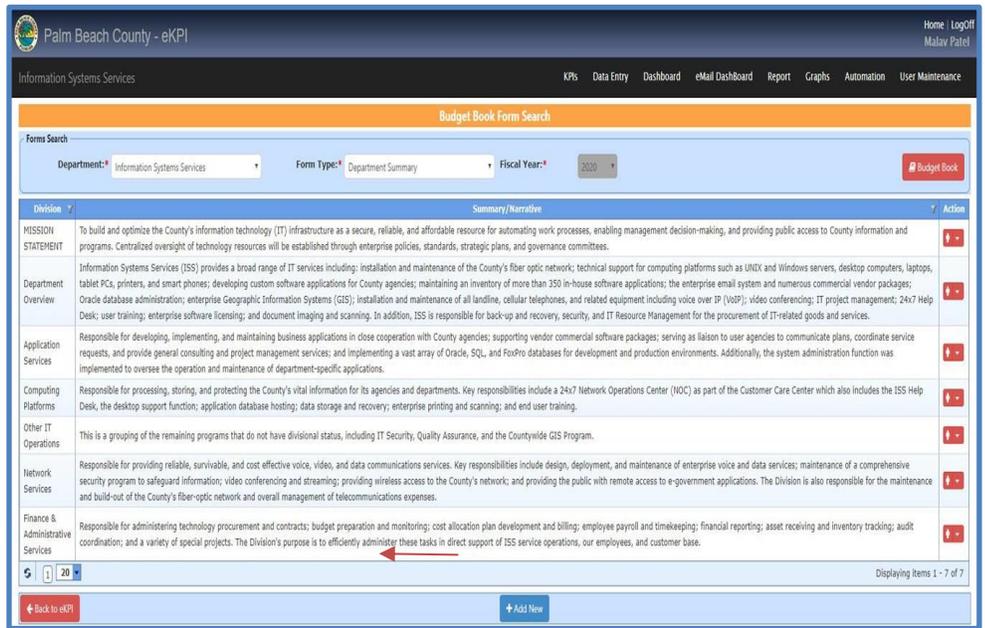
> 1. Click **Save** to display entry into the Department Summary grid (shown above).
>
> 2. Click **Add New** button to continue adding additional Divisions and Summary/Narratives.

> 3. Click **Clear** to clear the fields.
>
> 4. Click **Close** to close this window.

b. The Department Summary/Narratives can also be Updated or Deleted by clicking the Action drop-down list as shown below and selecting either **Update Narrative** or **Delete Narrative**.

c. Click **Update Narrative** action and the Update Department Summary screen is displayed, as shown below:

1. Make the required changes to the Title and Narrative.

2. Click **Save** to save the changes in the Department Summary grid.

3. Click **Add New** to Save the changes you made and continue adding a NEW Summary Narrative.

3. Click **Clear** to clear both fields and start over.

4. Click **Close** to close this window.

d. Click **Delete Narrative** action, and be prompted to confirm the deletion as shown below:

Message from webpage

? Are you sure you wish to Delete this Narrative?

OK   Cancel

1. Click **OK** to delete.

2. Click **Cancel** to stop the deletion.

2. Form Type: Highlight / Emerging Issue List
        (Click from drop-down list and the following is displayed)

a. Click the **Add New** button to display the Add Highlights/Emerging Issues screen as shown below. The Fiscal Year is auto-populated.

1. Select either **Highlights and Accomplishments** or **Emerging Issues.**

2. Enter the verbiage in the selected field.

3. Click **Save** to add to the **Highlights/Emerging Issues** grid, as shown above.

4. Click **Add New** to continue adding either Highlights or Emerging-I.

5. Click **Clear** to clear the fields.

6. Click **Close** to close this window.

b. The Highlights and Emerging Issues can also be Updated or Deleted by clicking the Action drop-down list as shown below and selecting either

>**Update Highlight** or **Delete Highlight**
>**Update Issue** or **Delete Issue**

c. Click **Update Highlight or Update Emerging-I** action and the Update Department Summary screen is displayed as shown below:

1. Select and make the required changes to either

Highlights and Accomplishments or **Emerging Issues.**

2. Click **Save** to Update the Department Summary grid.

3. Click **Add New** to save the changes you made and continue adding a NEW Highlight or Issue.

3. Click **Clear** to clear the field and start over.

4. Click **Close** to close this window.

d. Click **Delete Highlight** or **Delete Emerging-I** action, and be prompted to confirm the deletion as shown below:
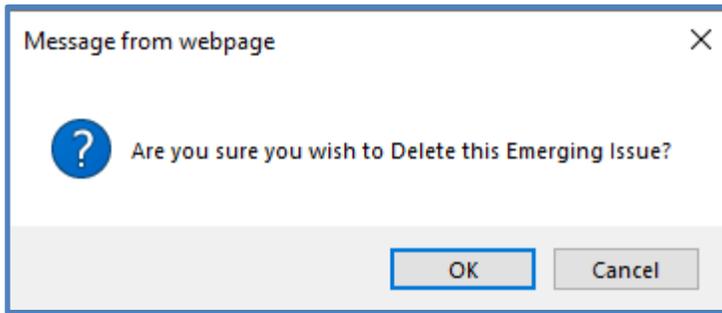
1. Click **OK** to delete.

2. Click **Cancel** to stop the deletion.

3. Form Type: Financial Summary (Click from drop-down list and the following is displayed)

a. Click the **Add New** button to display the Add Financials screen, as shown below. The Fiscal Year is auto-populated. All other data fields are required.

1. Type: Select from the drop-down list box.

2. Non-Ad Valorem Revenues: Select from the drop-down list box.

3. FY – Enter the appropriate values for each year.

4. Click **Save** to add the Financial to the grid display.

5. Click **Add New** to Save what has been entered then clear the fields for a new entry.

6. Click **Clear** to clear fields.

7. Click **Close** to close the window.

8. You can also Update or Delete each record by selecting the corresponding icon in the Action Column.

b. You can also Update Financials or Delete Financials from the Financial Summary primary screen, as shown below:

1. Click **Update Financial** and be presented with the Update Financials window which is identical to the Add Financials window above.

2. Click Delete Financial and be prompted to confirm the deletion as shown below:
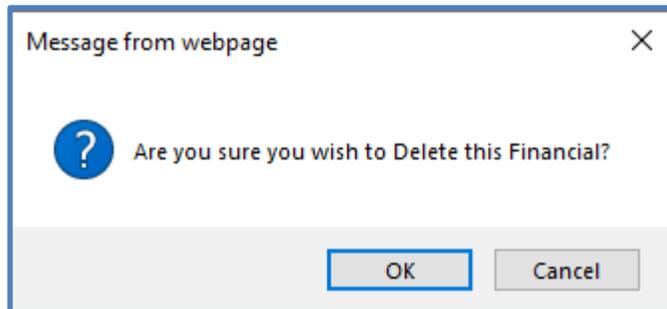
a. Click **OK** to delete the record.

b. Click **Cancel** to stop the deletion.

c. On the Financial Summary page, click the **Significant Changes** [⊕ Significant Changes] button and the following page is displayed: (The Fiscal Year defaults to current year).

1. Add any appropriate text to describe the Significant Changes affecting this budget cycle. You can cut and paste into this text box from another source.

2. Click **Save** to add or change the Significant Changes. A successful message will be displayed. Your changes will NOT save if you click the Close button.

3. Click **Clear** to clear all verbiage in the Significant Changes text box.

4. Click **Close** to close this window.

4. Form Type: Department Summary / Highlights – Emerging Issues (Combination Form)
   (Click from drop-down list and the following is displayed)
   This form is a combination of the **Department Summary Form** and the
   Highlights / Emerging Issues Form as described previously. It provides both sets
   of information in ONE grid as shown below.

a. Click on Add New and Add Department Summary / Highlight / Emerging Issue page is
displayed as shown below (Department Summary is the default page):

b. When selecting Highlight/Emerging Issues from the drop-down box, the
following page is displayed (Two options are available in the second drop-down list box:
(Highlights & Accomplishments or Emerging Issues – choose one)

1. Select either **Department Summary** or **Highlight/Emerging Issues** from the drop-down list box. (Department Summary is the default)

2. For Highlight/Emerging Issues, there are two options available for selection as noted above – choose one.

3. Enter the information associated with either the Summary, Highlight, or Emerging Issue.

4. Click **Save** to Save the record grid on the previous page.

5. Click **+ Add New** to continue adding either additional summaries, highlights, or emerging issues.

6. Click **Clear** to clear all fields.

7. Click **Close** to close the window.

c. Since there are three categories on the combination form
 (see left side of page below)
1. Department Narrative (Summary)
2. Highlights
3. Emerging Issues

You can Update or Delete any of these by selecting the option from the drop-down list
 (see right side of the page below):

5. Print Budget Book Button   📕 Budget Book

Click the Budget Book button to display the Print options for the Budget Book. You will have the option to print the following:

1. "Form Type Page" displayed on the screen
2. The Budget Book Report.

Fleet Management - Budget Book Report ✖

Please select the report

Cancel   Ok, Print Department Summary/Highlights-Emerging Issues ←

Ok, Print Budget Book Report ←
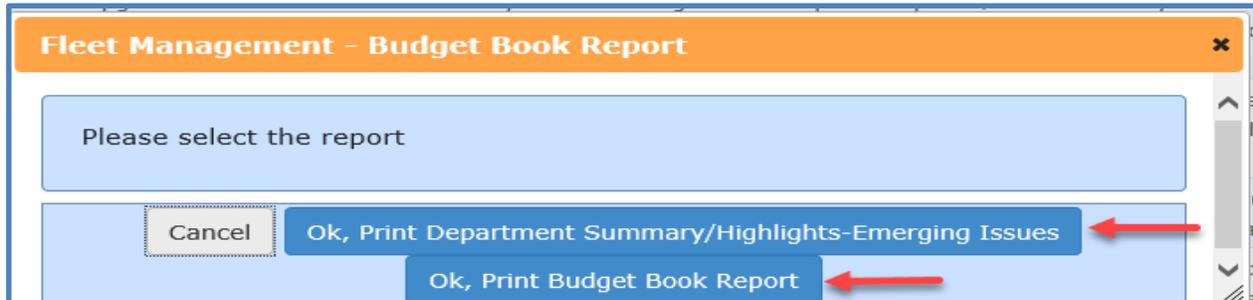
Performance Measures selected to be printed in the annual Budget Document (*informally known as the Budget Book*) must have an accompanying comment or narrative explaining the information provided. This comment is entered in the main page in the eKPI application in the KPI edit drop down menu, under the "BB Comment" item.

Airports		Palm Beach County, FL			
	PERFORMANCE MEASUREMENTS	**Actual FY 2019**	**Actual FY 2020**	**Target FY 2021**	**Target FY 2022**
	Airline Cost Per Enplanement ($9.00 or less = The Cost for Airlines to operate at PBI divided by PBI Enplanements) [1]	4.72	7.92	5.37	8.92
	Concession Revenue Per Enplanement	12.24	13.12	11.22	11.22
	Debt Service Coverage	3.87	3.76	3.25	3.25
	Maintenance Department: Ratio of closed vs open corrective work orders.	83.25	90.5	85	85
	Maintenance Department: Ratio of closed vs open preventive work orders.	85.25	84.75	85	85
	Number of completed airfield safety and regulatory inspections [2]	1,292	1,428	1,140	1,200

Comments

1. *Increase in costs for FY20 is direct correlation to the COVID-19 Pandemic effects. FY21 and FY22 targets were adjusted to account for long-term effects and the recovery time to return to pre-pandemic costs.*

2. *Number of completed airfield safety and regulatory inspections (Target minimum based on 3 inspections per day, average 30-day month for 12 months = 1080 minimum). Targets have increased based on higher actuals achieved in FY19 and FY20.*