



*RESULTS THROUGH PERFORMANCE MANAGEMENT  
(RPM) SYSTEM*

*USER MANUAL*

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*August 2013*

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### Why measure performance?

We measure performance to know how we are doing. Are our customers satisfied? Are we efficient? How effective are we at achieving results that matter? Performance measures help answer these questions.

Ideally, an agency should develop a common set of core measures that it can use for all management and reporting purposes. The performance measure system provides the fields to capture informational elements for Government Management Accountability and Performance (GMAP), Budget, Economic Recovery, and Agency Internal measures.

OFM's Results through Performance Management system (RPM) has been built to improve the ease and quality of measuring performance.

### What is a performance measure?

A performance measure is a numeric description of an agency's work and the results of that work. Performance measures are based on data, and tell a story about whether an agency or activity is achieving its objectives and if progress is being made toward attaining policy or organizational goals.

In technical terms, a performance measure is a quantifiable expression of the amount, cost, or result of activities that indicate how much, how well, and at what level, products or services are provided to customers during a given time period.

- "Quantifiable" means the description can be counted more than once, or measured using numbers.
- "Activities" mean the work, business processes and functions of Washington state government agencies.
- "Results" are what the agency's work is intended to achieve or accomplish for its customers.

## How to write a performance measure?

Performance measure titles should be concise and easy for someone not educated in your profession to understand.

- Since performance measures are numeric descriptions of work, start each measure by clarifying the unit of measure, for instance:
  - The number of . . .
  - The percentage of . . .
  - The ratio of . . .
- Next, tell the reader what is being measured. This is usually an attribute of work performance identified in an activity description, expected results statement, or logic model:
  - The number of days to fill a job vacancy . . .
  - The percentage of trainees finding a job . . .
  - The ratio of wetland acres cleaned of invasive species . . .
- Finally, when possible, use the word “per” to clarify the reporting cycle:
  - Average number of days it takes to fill a posted job vacancy per quarter.
  - Percentage of trainees finding a job within 30 days of training per quarter.
  - The ratio of wetland acres cleaned of invasive species per year.

A performance measure title should not include explanations of why the measure is important or how the data is collected. Those comments belong in the Relevance field or Operational Definition field.

Avoid jargon and acronyms in performance measure titles, so readers who are not subject matter experts can understand what is being measured.

Don't word performance measures as objectives. Objective statements include words such as “increase” or “decrease,” which imply change. Objective statements are not performance measures, although performance measures can tell us whether we are meeting our objectives.

For more information, see OFM's Performance Measure Guide at <http://www.ofm.wa.gov/budget/instructions/other/2009performancemeasureguide.pdf>

## About This Tutorial

This tutorial was developed to take budget staff through the steps of creating and managing performance measures for your agency that support the GMAP and Budget business processes. It is recommended that users with the various RPM security access levels (Budget Operations, Edit Access, and Read-only) should complete this tutorial. The tutorial will outline differences in access and system usage based on security level where it applies.

The tutorial can be used in a formal training session, for individual practice, or for developing the agency performance measure submittal. Some tutorial conventions:

- ⌚ Actual values to be entered when using for training or for practice are **highlighted**.
- ⌚ Functions to use will be in **Bold**.
- ⌚ If using on your own, please use your judgment to determine values to be used for practice or management of official performance measures.
- ⌚ Each task is preceded by a brief explanation of the task, its importance in your performance measure development, and general business rules.
- ⌚ Specific business rules and recommendations for entering your performance measure submittals are denoted with a ⌚ under the task.

Every effort is made to ensure that the RPM user guide and GMAP and Budget reporting Instructions agree in every way. In cases where a discrepancy exists, GMAP and Budget guidelines take precedence.

The BASS Library is at <http://bass.ofm.wa.gov/BASSPR/library/default.htm> or <https://fortress.wa.gov/ofm/bass/BASSPR/library/default.htm> for those using Fortress. The library may also be accessed by the help links available in all BASS applications. You can also contact the Budget Portfolio helpline at (360) 725-5278 or e-mail the help desk at [OFMBASS@ofm.wa.gov](mailto:OFMBASS@ofm.wa.gov).

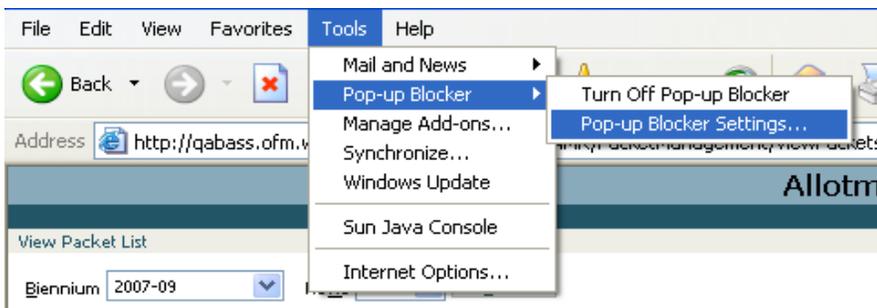
## How to Disable Pop-Up Blockers

⌚ *Note: In order for the application to work, you must disable your pop up blocker for this site. The easiest way to do this if your security is set to block pop ups, is to take the following actions when the message below appears as you try to work in the application:*

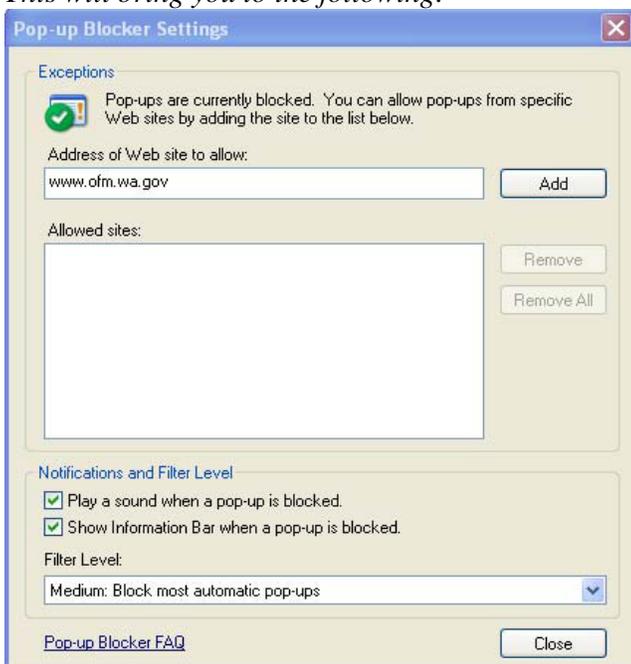
Click on  Pop-up blocked. To see this pop-up or additional options click here... and the following choices will appear:



Choose “Always Allow Pop-ups from this Site...” This will put the site in your security settings automatically. Or, while in Internet Explorer, select Tools, Pop-up Blocker, Pop-up Blocker Settings as seen below:



This will bring you to the following:



Type in under the “Address of Web Site to allow:” bass.ofm.wa.gov or fortress.wa.gov and click Add.

## System Security Levels for Agency Users of RPM

### Read-Only Security for RPM

If your security access is that of Read-only in RPM, then you can only view performance measures, action plans, and scenarios where your agency is designated as a lead or partner for the measure. The tutorial is meant to help with understanding of the system fields, features, and navigation. All performance measure data will be provided for view, but updates will not be allowed.

### Agency Edit Access Security for RPM

If your security access is that of Agency Edit Access in RPM, then you can view and update performance measures, action plans, and scenarios where your agency is designated as a lead or partner for the measure. All data will be provided for view, with the ability to update measures with a status of draft and returned. Some features are not allowed for this security level (Submit measures, manage Agency Contacts, and manage Themes, and manage Hierarchy attributes needed to create a hierarchy) and are noted within the tutorial.

### Agency Operations for RPM

If your security access is that of Agency Operations in RPM, then you can view and update performance measures, action plans, and scenarios where your agency is designated as a lead or partner for the measure. All performance measure data will be provided for view, with the ability to update measures with a status of draft and returned; and approved measures that contain only the Internal usage type. This security level provides access to all systems features allowed to an agency user. User with this role can manage Hierarchy attributes needed to create a hierarchy, and submit measures for the agency.

## **When a Measure or Action Plan is Placed In-Use**

- The system will only allow a single user to have a performance measure or action plan in-use at a time.
- A user must have the performance measure or action plan in-use to save changes.
- In-use will be applied to all statuses of the performance measure or action plan (E.g. If an approved pm is in use, then the draft is too.)
- The system will attempt to set the performance measure or action plan in-use when the user enters the performance measure.
- If the performance measure or action plan is already in-use by another user, the user will be notified that the performance measure is in-use by [lists the user name] and that the performance measure is read-only.
- The in-use will automatically expire after 120 minutes of inactivity for the measure or action plan.
- The in-use will clear for the measure when the user leaves the measure or action plan.

## **System Tips**

### ***User Session Preferences***

The system will “remember” your search and filter selections and will retain your selections from session use to session use.

When you choose to check or uncheck a filter option, these choices become part of your user preferences and will be maintained until they are changed. For example: if you select to filter for only Draft measures, then close the application, the next time you login and view a list of performance measures, only draft measures will display.

*See Show Search and Show Filter sections for further details.*

The Measure Details section within a measure last viewed will be “remembered” as well. For example if you have just left viewing or updating a measure’s Tracking Data. When you select a new measure to view or update you will be presented with the Tracking Data section of the selected measure, with the ability to navigate to other areas of the measure detail sections.

## **Save vs. Apply?**

**Apply** records the measure changes and you will remain on the *current* screen.

- For example: The Additional Details section within a measure is being updated, selecting Apply will save any changes to the measure and you will remain within the Additional Details section of the measure.

**Save** records the measure changes and returns you to the *previous* screen.

- For example: The Additional Details section within a measure is being updated, selecting Save will save any changes to the measure and you then will be navigated to the PM List screen.

### *Special Notes:*

All sections within a measure, the measure details, are considered the same screen.

When you are navigated to a new screen from within a measure, such as when updating certain elements like the Geographic Locations, the Save will navigate you back to the section within the measure details.

If there is more than one editable field within a performance measure section, after modifications have been made to a Display Grid Sections with ADD/Update Buttons an apply/save will need to occur.

## ***Performance Measure Status***

A single performance measure, identified by the measure number, can exist in a maximum of two statuses at any time.

- One version can have a status of **Approved** and;
- A second version can have a status of **Draft, Under Review, or Returned**.

Approved and Under Review status performance measures can be viewed by selecting the measure and clicking the Update button, a warning message will state the measure is read-only.

Draft or Returned status performance measures are available for modification.

To create a draft version, check one or more performance measures in approved status and then select the “Copy to Draft” button (see p. 42.)

## ***Status Changes and System Workflow***

A performance measure’s flow within the system workflow will depend on its Usage Type and specific changes within the measure. Note: Measures with a status of Draft or Returned can be submitted into the workflow.

**Measures that require an OFM Analyst review** have one of the following characteristics:

- Creation of a new measure with at least one official Usage Type (Budget, GMAP, or Economic Recovery),
- Changing the frequency to an existing official measure,
- Adding an official Usage Type to a previously approved measure.

The system changes the performance measure status from Draft to Under Review for measures with an official usage type that meet the OFM review requirements once a measure has been selected for submittal.

After an OFM analyst reviews the measure it will be marked as Approved or Returned. A Returned measure will follow the Draft status business rules of the system.

**Measures that will not require an OFM Analyst review** must meet one of the following characteristics:

- The measure’s only usage type is that of Internal,
- Updates to a previously approved measure with at least one official Usage Type that do not have a change of frequency or official Usage Type.

Measure(s) that does not require an OFM Analyst review will have their status automatically changed to Approved.

## How to Use System Features

**‘?’ mark icons for more info** – Throughout the application a blue circle with a question mark icon can be seen. Selecting the icon will display additional information about the related field.

**‘i’ mark icons for more info** – icon to the right of the title “Custom Search Applied” and “Default Filter Applied”, you can view the Search or Filter summary criteria. A message box will display with a close option to display the current search or filter criteria.

**Tool tips features** – placing your arrow above a title or button (with blue or white font) will display a short sentence stating its purpose or providing additional information about the feature.

### Column Sort functions

Performance Measure grid supports sorting on none or many columns.

Each column header has three possible states which you select by clicking the underlined text in the column header.

<u>Lead Agency</u>	<u>Number</u>	<u>Title</u>
▲1 Programs Partnerships	▼2	

There is a numeric indicator to the right of the sort direction arrow indicating that columns rank in the sort order.

- Sorted Ascending (from A to Z or low number to high number) - upward arrow
- Sorted Descending (from Z to A or high number to low number) - downwards arrow
- Not Sorted - No graphical indicator

### Measure Display Grid Sections with Action Buttons

All grids within the system have check boxes that require a secondary action after checking the box, such as clicking add, update, delete, set/unset, etc.

The following items of a measure display data as read-only; a user must select an action button to add or modify the data: Usage Type, CFDA's, Themes, Tracking Periods, Agencies, Related Performance Measures, Supported Activities, Program, Subprogram, and Action Plans.

Selections will be made by placing a check mark by an item or un-checking an item, then a selection to commit the action by selecting an action button. If there is more than one editable field within a section, then after these steps have occurred an apply/save will need to occur.

### How to display Grid Selection Items and Make Selections

- When The **Supported Only** is **checked** only those records that support the measure will display.

The screenshot shows a filter interface for a grid. At the top, a blue bar indicates '0 Records'. Below this, there are two buttons: 'Filter Data' and 'Reset Default Filter'. A checkbox labeled 'Supported Only' is checked. Below the checkbox, there are three buttons: 'Set/Unset Supported', 'Clear Sort', and 'Reset Default Sort'. At the bottom, a yellow box contains the text 'No records to display.'

- **Uncheck the Supported Only box, and then select the Filter Data button.** To Display selection values.



- **To check the box for the item to support the measure, and then the Set/Unset Supported button.**



- **In the Supported column a checkmark will indicate the selection supports the measure, an Apply/Save selection for the measure may be required.**



## Rich Text Functionality and Options



For Text boxes within the measure detail the following icon will be available for formatting and text presentation.

1. Bold – Make the selected text bold.
2. Italics – Make the selected text italicized.
3. Underline – Make the selected text underlined.
4. Cut – Cut the section of text and place it on the clipboard.
5. Copy – Copy the section and place it on the clipboard.
6. Paste – Paste the contents of the clipboard.
7. Left Justify Text – align the text to the left.
8. Center Justify Text – center the text.
9. Right Justify Text – align the text to the right
10. Justify – align text to both the left and right margins, adding extra spaces between words as necessary.
11. Increase Indent – Increase the indent level of the paragraph.
12. Decrease Indent – Decrease the indent level of the paragraph.

13. Bullet – Bullets first item in the list. Items in a bulleted list that are pasted into the field will remain bulleted. The bullet button will toggle bulleted on or off.
14. Number – Numbers first item in the list. Items in a numbered list that are pasted into the field will remain numbered. The number button will toggle numbering on or off.
15. Spell check – Check spelling of the selected text.
16. Word count – For the text field, counts the words, characters, and characters without spaces.
17. Find and Replace – Find words in the text field and replace text in the document.
18. Font style – Change the font for the selected text.
19. Font size – Change the font size for the selected text.
20. Formatting – Change the format of text from normal to a heading option.
21. Font Color – Change the font color for the selected text.
22. Insert Table – Insert a table into the text field.

## **Getting Started – Logging on to RPM and System Navigation**

1. Open Internet Explorer and enter the login address  
[http://bass.ofm.wa.gov/BASSLogon\\_pr/](http://bass.ofm.wa.gov/BASSLogon_pr/) (or [https://fortress.wa.gov/ofm/bass/BASSLogon\\_pr/](https://fortress.wa.gov/ofm/bass/BASSLogon_pr/) for those using Fortress) in the address bar of the browser.  
 If in a training session, skip this step.

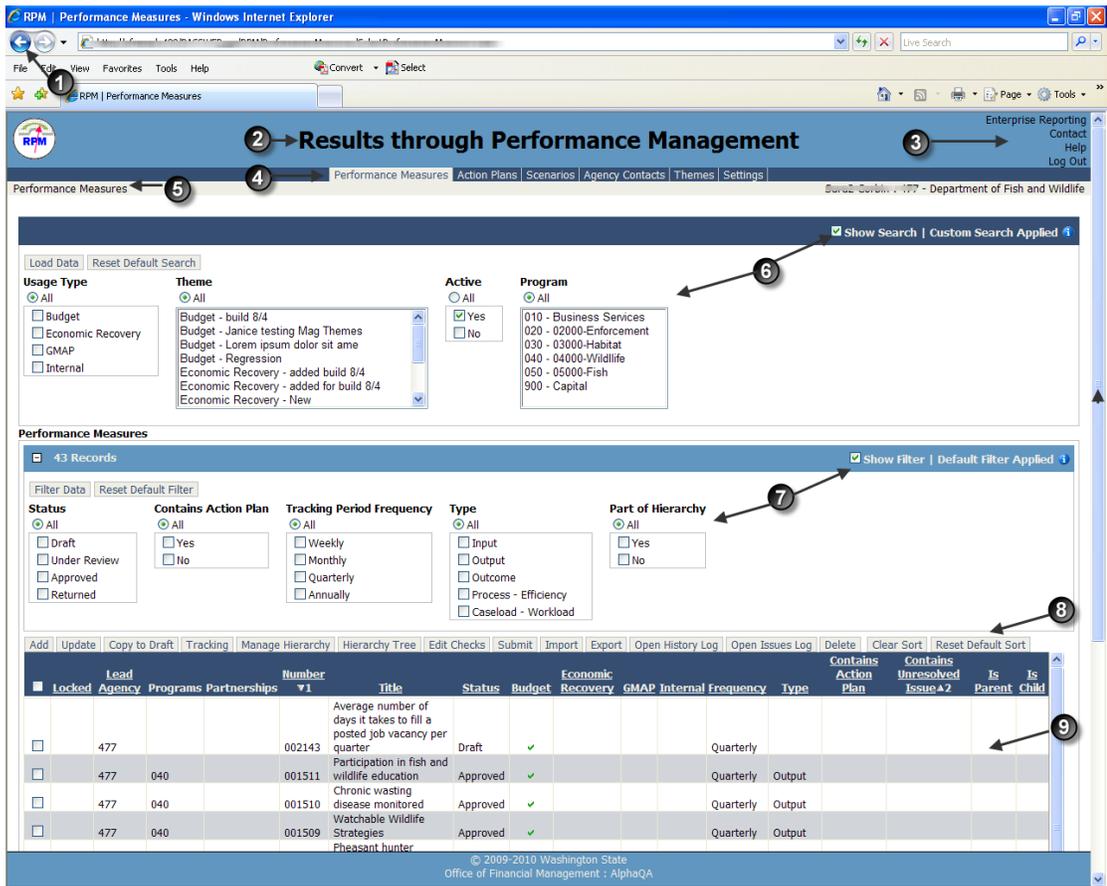
2. Use your login ID and password to log in to BASS. *If you do not have a login ID and password, a security form can be found in the BASS library.* (<http://bass.ofm.wa.gov/BassPR/library/security.pdf>)

User ID - <Agency Number>00<First Name>  
 10500training  
 Password - <First Name>  
 Training



3. Select the RPM (Results through Performance Management) icon

All navigation bars and selection tabs are in the same place on every page. The selection tabs run horizontally across the top of each screen, allowing for the selection of screen features and system navigation. Shortcut links on the application tab bar (4) and the breadcrumb bar (5) allow for the ability to “jump” to previously viewed pages without using the browser Back button.



1. **Internet browser navigation buttons.** ⌚ *Note: The BASS suite of applications does not support the use of internet browser navigation buttons, i.e. 'back arrow' and 'forward arrow'. You should avoid using the back arrow and forward arrow buttons available on your web browser tool bar when working in BASS. Using these buttons will give unpredictable results depending on the screen you are on when used.*
2. **Page Header includes Application Title Results through Performance Management (RPM)** is always visible throughout the application.
3. **Enterprise Reporting, BASS Contact, BASS Help and Logout**—Options include:
  - **Enterprise Reporting** - a short-cut to the ER login screen which provides access to RPM reports.
  - **Contact** - provides BASS Help staff system support phone and e-mail information.
  - **Help** - provides BASS system help documentation and User Guides.
  - **Log Out** - the means to log out of the RPM application and navigate back to the Bass system Main Menu. ⌚ *Note: It is extremely important to properly logout of the system when not in use. There is a timeout provision included in the system. If your session is inactive for 120 minutes the system will time you out.*
4. **Application Tab Bar** is always available, and includes a tab for each major functional area in the system including:
  - **Performance Measures** - provides a list of performance measures and the means to manage measures. This component of the application is available to all security roles.
  - **Action Plans** - provides a list of action plans and the means to manage the plans. This component of the application is available to all security roles.

- **Scenarios** – provides the ability to create a view of related performance measures for grouping by Topic and Subtopic and the ability to create linkages between measures.
- **Settings** – provides the ability to select the preferred performance measure status for measures that are part of a hierarchy or scenario. Where more than one status exists for a performance measure the settings tab will provide for an option to include View Approved or View Unapproved performance measures for those measures that are part of a hierarchy or scenario.

*Agency Operations security* roles will have an additional three options:

- **Agency Contacts** - provides a list of agency e-mail contacts and the means to manage contacts. Only Agency Operations security level can add/update contacts for your agency; this feature is not available for Agency Edit Access and Read-only security access.
  - **Themes** - provides a list of Internal Agency topic areas and the means to manage themes. Only Agency Operations security level can add/update internal themes; this feature is not available for Agency Edit Access and Read-only security access.
5. **Breadcrumb Bar** serves as a trail to navigate back to any previously viewed screen in the application. Each time an action on a performance measure is selected that navigates you down a path, a link will display to allow the quick navigation back to any previous point. The breadcrumb bar is dynamic in that any given page will show a different breadcrumb trail based on how the page was reached.



6. The **Show Search** feature allows you to identify all the performance measures for your agency by Usage Type, Theme, Active, Program.
7. The **Show Filter** feature allows you to narrow down and limit the display of performance measures identified in the Show Search selection for your agency by Status, Contains Action Plan, Tracking Period Frequency, Type, and Part of Hierarchy.
8. **Performance Measure List Action Buttons** allow you to perform actions on the selected performance measures.
9. **Performance Measure List grid** - At the bottom of the page is a list of performance measures based on the search and filter criteria selected.

## Performance Measure List Screen

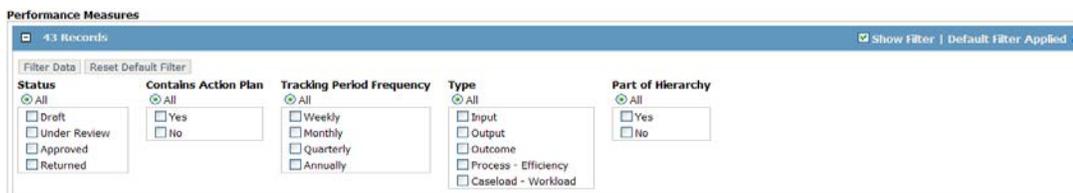
When the **Performance Measures** tab has been selected, and Performance Measures is the only title on the bread crumb bar, this is the **PM List screen**. A list of performance measures display at the bottom of the screen based on the selections within both the **Search** criteria and the **Filter** criteria.



On the right hand side within the blue **Show Search** bar is the option to Check to show all search options, or Uncheck to hide the search options. This feature allows you to identify all the performance measures for your agency by:

- **Usage Type** (how the performance measure will be used)
- **Theme** (specific topic/grouping area)
- **Active** (is the performance measure actively being used or is it an Inactive measure)
- **Program** (agency program, with the option to select all, one, or many)

When **changing any of the search** criteria, **select the criteria then select the LOAD DATA button to finalize** the selections. The Reset Default Search button selects All Usage Types, All Themes, and Only Active measures.



On the right hand side within the blue **Show Filter** bar is the option to Check to show the filter options, or Uncheck to hide the filter option. This feature allows you to narrow down and limit the display of performance measures identified in the Show Search selection for your agency. The Show Filter feature provides the ability to limit by:

- **Status** (reflecting a performance measures point in the workflow)
- **Contains Action Plan** (does the measure contain an action plan)
- **Tracking Period Frequency** (relating to a measures tracking data collection/reporting frequency),
- **Type** (the result type of the performance measure).
- **Part of Hierarchy** (identifies those measure that are linked to other measures in a hierarchy)

When **changing any of the filter** criteria, **select the checkbox(s) then select the FILTER DATA button to finalize** your selections. The Reset Default Filter button selects All Status, All Tracking Period Frequency, and All Type criteria.

## **PM List Action buttons:**

At the bottom of the page is a list of performance measures based on the search and filter criteria selected. Above this list of measures is a row of Selection/Action buttons:

Add Update Copy to Draft Tracking Manage Hierarchy Hierarchy Tree Edit Checks Submit Import Export Open History Log Open Issues Log Delete Roll Tracking Data Clear Sort Reset Default Sort

1. **Add** - Add a new performance measure will first display a screen with the required fields to save a measure – after entering the date and selecting Apply, all fields for the measure will be made available for data entry.
2. **Update** - Perform a variety of operations on one or more performance measures. By selecting the checkbox(s) for a performance measure then Update button.
  - For Agency Edit Access and Agency Operations security level users, those measures that contain at least one Official usage type with a status of Approved and Under Review will be read-only, and those with a status of Draft and Returned will be available for Modification. Only Agency Operations security level users can update the Approved copy of a measure with a single usage type of Internal.
3. **Copy to Draft** - Make a working/modifiable copy of the measure. For Measures with a status of Approved, selecting the check box on the line of the Approved measure, then the Copy to Draft button.
4. **Tracking** - For a Draft and Returned Measure this selection will direct you to the Tracking Data input screen. For Approved and Under Review measure status the Tracking Data screen will be read-only. The system provides the ability to update tracking amounts for one or more performance measures from the performance measure list screen.
5. **Manage Hierarchy** - Used to add a new hierarchy, mathematical relationship between selected performance measures, to the current performance measure and/or update a hierarchy's attributes.
6. **Hierarchy Tree** - used to view the entire hierarchy of a selected performance measure. This view will display all measures in a hierarchy and their relationship within the hierarchy.
7. **Edit Checks** - selecting the checkbox(s) for the measures ready for submittal, then the Edit Check button will run the edit checks and produce an error report of potential warnings and errors.
  - Items within the Critical section of the report will need to be updated for items listed before the measure can be successfully submitted,
  - Items within the Warning section are informational/being brought to your attention in case they were not meant to be missed,
  - Items in the Informational section list the measures the edit check report was run against.
8. **Submit** - The process of sending a performance measure for review and approval. One or more measures can be submitted at a time. Selecting the checkbox(s) for the measures ready for submittal, then the Submit Check button, will place the measures into the workflow. Submit is not available for Agency Edit security users. Performance measures that have an OFM Operations Lock applied to them cannot be submitted. Note: Measures with a status of Draft or Returned can be submitted into the workflow.

9. **Import** - provides the ability to import a previously exported excel spreadsheet of tracking data. Only measures numbers and dates listed within the excel spreadsheet will have their tracking data updated.
10. **Export** - selecting the checkbox(s) for the measures to be exported, then the Export button, will produce an excel spreadsheet with the tracking data for the biennia selected.
11. **Open History Log** - select the checkbox for a measure, then the Open History Log to view the historical actions related to the measure.
12. **Open Issues Log** – select the checkbox for a measure, then the Open Issues Log to view the communication and questions between you and your OFM Analyst related to the measure.
13. **Delete** - Only draft or returned measures with one measure Usage Type can be deleted. See *Delete a Measure?* Section.
14. **Roll Tracking Data** - provides user ability to roll multiple selected Performance Measures into a new biennium in a batch process.
15. **Clear Sort** - Reference the PM List grid below. Removes any column sort order and its ascending/descending option.
16. **Reset Default Sort** - Reference the PM List grid below. Will reset the default column sort options to Lead Agency Ascending, and then based on the lead agency the measure number ascending.

## Performance measure Grid

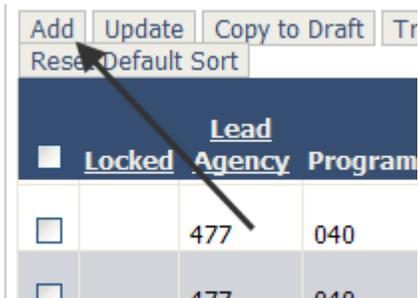
Add   Update   Copy to Draft   Tracking   Manage Hierarchy   Hierarchy Tree   Edit Checks   Submit   Import   Export   Open History Log   Open Issues Log   Delete   Roll Tracking Data   Clear Sort   Reset Default Sort																	
Locked	Lead Agency	Programs	Partnerships	Number	Title	Status	Budget	Economic Recovery	GMAP	Puget Sound	Internal	Frequency	Type	Contains Action Plan	Contains Unresolved Issue	Is Parent	Is Child
<input type="checkbox"/>	105	030		000211	Helpdesk problem resolution	Approved	✓				✓	Quarterly	Process - Efficiency				
<input type="checkbox"/>	105	030		000211	Helpdesk problem resolution	Draft	✓				✓	Monthly	Process - Efficiency				
<input type="checkbox"/>	105		111	000250	Percent classifications reviewed annually	Approved	✓				✓	Annually	Output				
<input type="checkbox"/>	105		111	000250	Percent classifications reviewed annually	Draft	✓				✓	Annually	Output				
<input type="checkbox"/>	105		111	000251	Percent rules reviewed annually	Approved	✓					Annually	Output				
<input type="checkbox"/>	105		111	000251	Percent rules reviewed annually	Draft	✓					Annually	Output				
<input type="checkbox"/>	105		111	000259	Number of agencies/institutions that have completed a Performance Management Confirmation assessment	Approved	✓					Annually	Output				
<input type="checkbox"/>	105		111	000259	Number of agencies/institutions that have completed a Performance Management Confirmation assessment	Draft	✓					Annually	Output				
<input type="checkbox"/>	105		111	000260	Percent of state workforce with current performance evaluations	Approved	✓				✓	Annually	Output				
<input type="checkbox"/>	105		111	000260	Percent of state workforce with current performance evaluations	Draft	✓				✓	Annually	Output				

- **Locked** (column) – a lock icon in the column indicates the performance measure is locked. OFM Operations can perform a lock and unlock of the performance measure. Both the Approved and Draft or Returned instance of the measure will display a lock icon. The draft (or returned) status performance measure can be updated but not submitted when a lock has been applied. Any linked action plans cannot be updated.
- **Contains Action Plan** (column) – a checkmark will display if an action plan is linked to the performance measure.
- **Contains Unresolved Issue** (column) – a folder icon indicates if a performance measure contains an issues log item. Both the Approved and Draft (or Returned) instance of the measure will display a folder icon. Select the measure (any status), then the Open Issues Log button to review and respond.
- **Is Parent** (column) – a checkmark will display if the performance measure is a parent measures in a Hierarchy.

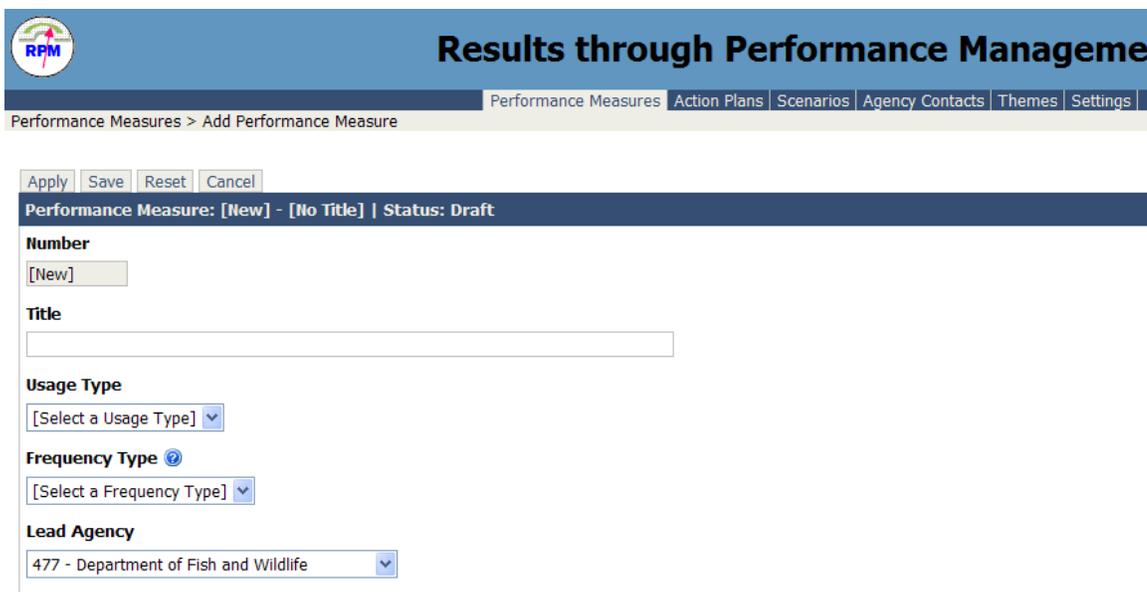
- **Is Child** (column) – a checkmark will display if the performance measure is a child measure in a Hierarchy.
  - Note: If both Is Parent and Is Child have checkmarks, the measure is linked to a Parent measure and has a linked child measure(s).
- The number of measures displayed can be selected at the bottom on the screen. Options are 10, 20, 30 or All measures on a page.
- Note: The more items selected to display on the page will result in a slower response time loading the Performance Measure list screen.

## Add (Create) a new Performance Measure:

Select the **ADD** button above the list of performance measure on the left hand side of the Performance Measure List screen.



The first screen contains all required fields to save a measure.

A screenshot of a web application form titled 'Results through Performance Managemen'. The breadcrumb trail is 'Performance Measures > Add Performance Measure'. The form has buttons for 'Apply', 'Save', 'Reset', and 'Cancel'. The current state is 'Performance Measure: [New] - [No Title] | Status: Draft'. The form fields are: 'Number' with a text input containing '[New]'; 'Title' with an empty text input; 'Usage Type' with a dropdown menu showing '[Select a Usage Type]'; 'Frequency Type' with a dropdown menu showing '[Select a Frequency Type]'; and 'Lead Agency' with a dropdown menu showing '477 - Department of Fish and Wildlife'.

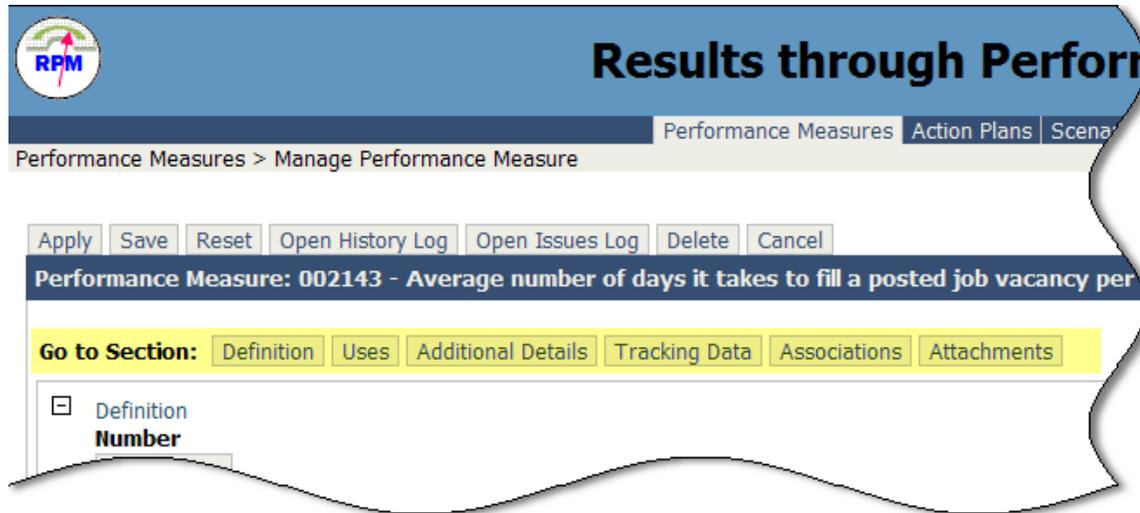
- Enter the measure **Title**, select a **Usage Type**, select a **Frequency Type** and your agency will be listed in the **Lead Agency** field.
- Select the **Apply** button to continue with the measure updates, after doing so the standard measure sections will be available. The unique measure number will be assigned by the system on the apply/save

Note: The Save button will save your changes and take you back to the PM List screen.

## Add/Update/View PM Detail Screen

A performance measure is broken down into multiple sections: Definition, Uses, Additional Details, Tracking Data, Associations, and Attachments.

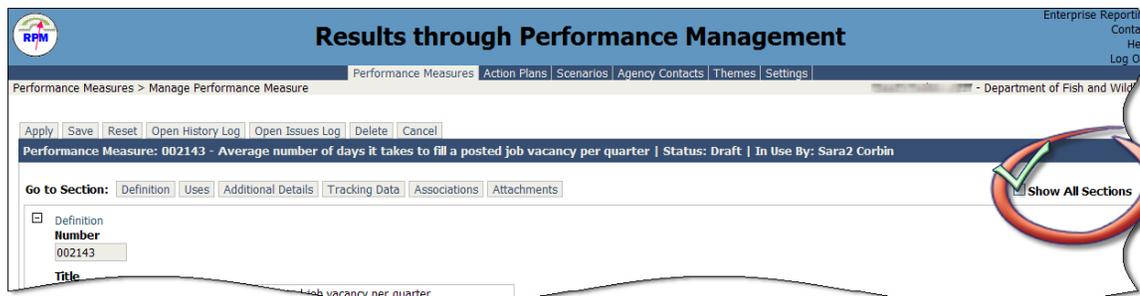
You can jump to any section by using the *Go To Section:* navigation header at the top of the screen.



Additionally, you can use the Show All Sections option to the right of the section buttons.

**Show all PM Sections functionality** – On the upper right hand side when managing a performance measure a Show All Sections selection box is available.

When this box has been **checked**, all sections of the measure detail will display and are accessible by scrolling up and down the measure screen.



Each section allows for a expand/collapse feature by clicking on the ‘-‘ (expanded) or the ‘+’ (collapsed) as shown below:

The screenshot displays a web application interface for managing performance measures. The top navigation bar includes the RPM logo and the text "Results through". Below this, a breadcrumb trail reads "Performance Measures > Manage Performance Measure". A secondary navigation bar contains buttons for "Apply", "Save", "Reset", "Open History Log", "Open Issues Log", "Delete", and "Cancel".

The main content area is titled "Performance Measure: 002143 - Average number of days it takes to fill a poste". Below the title, a "Go to Section:" menu offers options: "Definition", "Uses", "Additional Details", "Tracking Data", and "Associations".

The "Definition" section is expanded, showing a "Number" field with the value "002143", a "Title" field with the text "Average number of days it takes to fill a posted job vacancy per quarter", a checked "Active" checkbox, a "Type" dropdown menu set to "[Select a Measure Type]", and a "Description" field with a rich text editor toolbar. Below the description is an "Operational Definition" field, also with a rich text editor toolbar.

A sidebar on the left side of the interface contains a "Focusing Question" field and a list of expandable sections: "Uses", "Additional Details", "Tracking Data", "Associations", and "Attachments". Each section is preceded by a square icon containing a plus sign (+), indicating it is currently collapsed. A red circle highlights the plus sign for the "Additional Details" section, and a red arrow points to it from the left.

## Sections within a Performance Measure

### Definitions section of the performance measure –

The screenshot displays the 'Results through Performance Management' interface. At the top, there's a navigation bar with 'Enterprise Reporting', 'Contact', 'Help', and 'Log Out'. Below that, a breadcrumb trail shows 'Performance Measures > Manage Performance Measure'. The main content area is titled 'Performance Measure: 002143 - Average number of days it takes to fill a posted job vacancy per quarter | Status: Draft | In Use By: Sara2 Corbin'. A 'Go to Section:' menu is visible, with 'Definition' selected. The 'Definition' section is expanded, showing several fields: 'Number' (002143), 'Title' (Average number of days it takes to fill a posted job vacancy per quarter), 'Active' (checked), 'Type' (Select a Measure Type), 'Description', 'Operational Definition', 'Relevance', and 'Focusing Question'. Each text field has a rich text editor toolbar above it. Below the definition fields are tabs for 'Uses', 'Additional Details', 'Tracking Data', 'Associations', and 'Attachments'.

1. **Number** (performance measure number) - The performance measure number is system generated and read-only.
  - ❖ **Former PMT Code** - If the measure was created in the previous Performance Measure Management system (PMT) the identification code for the former measure will be displayed. **If the measure was created in the new RPM system the field will not display on the screen.** In the example above this field does not display since this a new measure in RPM system.
2. **Title** - A short title for the measure.
  - A title is required to save the measure.
  - Allows for a maximum of 100 characters.
  - Modifications are tied to Status: this change will be draft until the measure is approved.

3. **Active** - If there is check mark this indicates the measure is active, if no check mark the measure is inactive and no longer being tracked.
  - Not tied to workflow; this is a change to the measure that will affect all instances of the measure number.
  
4. **Type** (measure type) - Optional field to submit.
  - Input measure - A measure of resources used by an activity or process. Some inputs relate to workload. Others relate to the amount of resources used in a process. Examples: Applications received, Dollars spent, Staff hours used.
  - Output measures - The number of units of a product or service produced or delivered. Examples: Eligibility interviews conducted, Children immunized, Number of non-compliant woodstoves replaced.
  - Outcome measures - Measures of ultimate benefits associated with a program or service. Examples: Reduction in deaths, Improvement in air quality in areas with wood-stove compliance program.
  - Process-Efficiency measures - Describe aspects of the business process, such as completion rate, processing time, backlog, error rates, and so on. Example: Days to issue a permit.
  - Caseload-Workload measures - Measures of customer demand received by a business process. Examples: applications per month, filings received per week, clients per caseworker.

➤ Note: Measure Type changes are tied to status, changes will be draft until the measure is approved.
  
5. **Description** (measure description) – A short description of the measure.
  - Optional field for submittal.
  - Field allows a maximum of 255 characters.
  - Rich Text options provided.
  - Field is tied to status; changes will be draft until the measure is approved.
  
6. **Operational Definition** - The operational definition of the measure describes the process of collecting, recording, and analyzing the data that makes up the performance measure. The operational definition provides an important quality assurance role by documenting how a measure is calculated.
  - Optional for submittal.
  - Field allows a maximum 8000 characters.
  - Rich Text options provided.
  - Field is tied to status; changes will be draft until the measure is approved.
  
7. **Relevance** - Explains the purpose of the performance measure, why the measure matters to this activity, business process, or goal.
 

For a instance, provide a short (1-2 sentences) version of a logic model that would explain how the measure relates or why it matters to an activity, why it's important for a process, or how it shows progress toward an outcome or a broad goal (e.g. a POG result or strategy).

  - Optional for submittal.
  - Field allows a maximum of 255 characters.
  - Rich Text options provided.
  - Field is tied to status; changes will be draft until the measure is approved.

8. **Focusing question** - The question that the measure is intended to answer.
- Optional for submittal.
  - Field allows for a maximum of 100 character.
  - Field is tied to status; changes will be draft until the measure is approved.

## Uses section of the performance measure

The screenshot displays the 'Results through Performance Management' interface. At the top, there is a navigation bar with 'Enterprise Reporting', 'Contact', 'Help', and 'Log Out'. Below this is a breadcrumb trail: 'Performance Measures > Manage Performance Measure'. The main content area is titled 'Performance Measure: 002143 - Average number of days it takes to fill a posted job vacancy per quarter | Status: Draft | In Use By: Sara2 Corbin'. A 'Go to Section:' dropdown menu is set to 'Definition', with other options including 'Uses', 'Additional Details', 'Tracking Data', 'Associations', and 'Attachments'. A 'Show All Sections' checkbox is checked. The 'Uses' section is expanded, showing 'Usage Types' with '4 Records'. A table lists usage types: Budget (checked), Economic Recovery, GMAP, and Internal. Below this is a 'Related to Economic Stimulus' checkbox. The 'CFDAs' section shows '2234 Records' with a 'Show Filter' and 'Custom Filter Applied' indicator. A table lists CFDA records with columns for 'Supported', 'Number', and 'Title'. The 'Themes' section shows '0 Records' with a 'Show Filter' and 'Default Filter Applied' indicator. At the bottom, there are sections for 'Additional Details', 'Tracking Data', 'Associations', and 'Attachments'.

## What is Usage Type:

Budget, GMAP, Economic Recovery, and Internal, identifies how the measure will be used. Official usage types are Budget, GMAP, and Economic Recovery. Internal usage provides a means for agencies to create agency only measures and include an internal usage for official measures. A measure must have at least one usage type selected, but can have up to all four. When a measure is shared by multiple agencies, all agencies will have the same measure usage types that are determined by the lead agency.

9. **Usage Types** - One or more use types: Budget, GMAP, Economic Recovery, or Internal is required to save the measure. This identifies the reason why measure was created, and which areas the measure supports.

- For new Official measures (those with a status of draft/returned and that do not have an approved copy) both Agency Edit Access and Agency Operations security level users can Update/Remove Official usage types.
- Both Agency Edit Access and Agency Operations security level users can Update/Remove Internal usage types for measures with a status of draft or returned.
- Only Agency Operations users can add official usage types to measures with an approved copy.

- Operations security level users can Update/Remove Internal usage type in an Approved measure.
  - Note: Only OFM Operations security level users can remove official usage types from a performance measure that has been approved at least once.
  - Note: Selections are tied to status; changes will be draft until the measure is approved.

10. **Related to Economic Stimulus** - System generated check mark will display when the usage type of Economic Recovery has been selected. Field is Read-only.

11. **CFDA** - Catalog of Federal Domestic Assistance number is the identifier of a federal grant source of revenue.

- One or many must be selected if the Usage type of Economic Recovery has been selected.
- Optional and not required to submit for all other usage types.
- Field is tied to status; changes will be draft until the measure is approved.

12. **Themes** - Themes provide a way for an agency to categorize, tag, or otherwise identify measures as being associated with a certain topic. Each usage (e.g. budget, GMAP, and internal) has different themes, and the themes listed for selection will be based on the measure's usage types.

For instance, a measure could have a theme of Toxics – Air pollution. Internal themes are defined by Agency Operations users, and are then available to be associated with that agency's measures.

- Select none, one, or many agency specific topic/grouping themes.
- A measure usage Type must be Internal in order for agency Internal Themes to be available for selection.
- Optional for submittal.
- Field is tied to status; changes will be draft until the measure is approved.

## Additional Detail section of the performance measure –

Enterprise Reporting  
Contact  
Help  
Log Out

Performance Measures > Manage Performance Measure

Performance Measure: 002143 - Average number of days it takes to fill a posted job vacancy per quarter | Status: Draft | In Use By: Sara2 Corbin

Go to Section: Definition | Uses | Additional Details | Tracking Data | Associations | Attachments

Definition

Uses

Additional Details

Contacts

0 Records

Add | Update | Remove | Clear Sort | Reset Default Sort

No records to display.

Geographic Locations

0 Records

Add | Update | Delete | Clear Sort | Reset Default Sort

No records to display.

Summary Analysis

Detailed Analysis

Notes (Unpublished)

User Defined Field

Action Plans

0 Records

Show Filter | Default Filter Applied

Filter Data | Reset Default Filter

Status

Usage Type

All

Not Started

In Progress

Completed

Deferred

Waiting for information

Budget

Economic Recovery

GMAP

Internal

Add | Manage | Update | Remove | Clear Sort | Reset Default Sort

No records to display.

Tracking Data

Associations

Attachments

13. **Contacts** - The system provides an ability to identify different people to contact about the measure, and select one or many role(s) associated to the contact.

Contacts for an agency must be added by an Agency Operations user in the “Agency Contacts” section of the application. After contacts are in the agency’s master list, a user can associate them with a measure.

**How to:** Select the **Add** button, then **select a contact from the contact list** dropdown, then **select a Role**, and **verify or uncheck** if the contact should **receive e-mail notification**. Select **Save** to complete contact addition.

- Each Contact must have at least one role selected to save. **If there are changes to the measure an Apply selection must be made prior to the Add contacts button selection.**

Also, the e-mail notification flag can be updated from here. A checked flag means that the contact will receive auto generated e-mails from the system when the measure has changed status in the workflow.

- The list of contacts is agency specific. If a contact for your agency does not exist in the list, then an Agency Operations user must add them to the Agency Contacts section of the system.
- All contacts for the measure will display regardless of the agency with which they are associated.
- An active contact for the lead agency is recommended for submittal (pre-release warning message.)
- This is not tied to workflow; a contact change will change all instances of the measure.

**14. Geographic Locations** - Geographic Location provides a means to identify the Location relevant to the performance site. **If there are changes to the measure an Apply selection must be made prior to the Add/Update geographic locations button selection.**

- Only **one** of the **fields** is required to **save** a geographic location (Latitude and Longitude are considered one field). Optional for submittal. A measure can contain none, one, or many geographic locations.

**How to:** Select the **Add** button, **enter the Location Information**, then **Select Save** to complete contact addition.

- Address 1: 40 characters  
Address 2: 40 characters  
Zip Code: five digit zip codes plus four code.  
County: select from list  
City: select from list  
Washington State Legislative District: select from list  
Location Description: maximum of 100 characters  
Latitude Degree: maximum field length is two characters a period, then six characters. Degree may be negative.  
Longitude Degree: maximum field length is three characters period, then six characters. Degree should be negative.
- Find Latitude/Longitude Information (opens a new window)
- Select the link to a site that will convert an address to the Latitude/Longitude information, and convert Latitude/Longitude Information from an address.

**15. Summary Analysis** - Summary analysis is a high level summary explanation and analysis of the performance measure.

- It should not have uncommon acronyms or technical language. The sentence should answer the Focusing Question and summarize the main message or point of the data in one or two sentences. After the first point, what should be included will vary depending on what the most important information about the measure is. Highlight what is most important in 1-3 points. Put the most

important point at the top, so if someone were to stop reading before the end, they would have received the most important information first.

- Consider these questions as possible areas to discuss in the analysis:
  - What is the data telling us?
  - Why is this important? Why does it matter?
  - What factors have influenced past and future trends/trend lines?
  - Are there caveats or problems that may not be obvious?
- Optional for submittal.
- Field provides a maximum of 1000 characters.
- Rich Text options provided.
- Field is tied to status: changes will be draft until the measure is approved.

16. **Detailed Analysis** - Space is for further analysis or background information that is in addition to, or an expansion of, the Summary Analysis.

- The extended analysis can be used to go into more detail about the measure, performance, key strategies, factors that influence performance, or any other pertinent information.
- Optional for submittal.
- Field allows a maximum of 8000 characters.
- Rich Text options provided.
- Field is tied to status; changes will be draft until the measure is approved.

17. **Notes (Unpublished)** - A section for a series of details, like a standard set of footnotes to the measure.

- Optional for submittal.
- Field allows a maximum of 8000 characters.
- Rich Text options provided.
- Field is tied to status; changes will be draft until the measure is approved.

18. **User Defined Field** – Field allows for agency unique text for the measure.

- Optional for submittal.
- Field allows a maximum of 255 characters.
- Tied to Status: this change will be draft until the measure is approved.

19. **Action Plans** – Provides the ability to add and manage action plans.

- Action plans can only be added from within a performance measure.
- An action plan can be linked to one or more performance measures.
- Action plans cannot exist without a link to a performance measure.
- Official Usage Types can be added by Agency users but can only be removed from the action plan by OFM Operations.
- There are two filter options in this section: Status and Usage Type.

➤ Additional information about action plans can be found in the main Action Plan section starting on page 66 of this tutorial.

**Note: If the measure has unsaved changes the Apply button must be selected prior to the Add or Manage or Update button selection.**

**How to:** Use the “**Add**” button to create a new action plan.

- At a minimum an action plan should include: 1) a specific task of what will be done, 2) by whom and 3) by when.
- The **required fields to save** a newly added action plan are: Title, Usage Type, and Person Responsible.
- The Usage Type selected is to identify the business process the action plan supports. The usage types displayed will be based on those selected for the performance measures. A minimum of one usage type must be selected to save the action plan.

**How to:** Use the “**Manage**” button to attach to the performance measure an action plan that already exists.

- You will be navigated to the Manage Performance Measure Action Plans screen, check the action plan then select the Set/Unset Associated button, and then Save button.
- Note: the Manage button can also be used to remove (Unset) action plans from the performance measures.

**How to:** Use the “**Update**” button to make modifications to the selected action plan.

- Action Plans can also be updated from the main Action Plan tab located under the system title at the top of the screen.

**How to:** Use the “**Remove**” button to remove the action plan from the performance measure.

- Provides the ability to unlink an action plan from a performance measure.
- When an Action plan is removed from the last performance measure (action plans can only exist if they are linked to a minimum of one performance measure), a warning message will be displayed. After accepting the OK button, the action plan will be deleted from the system.

**Note:** Tasks that are part of an on-going strategy with no specific end date should be included in the Detailed Analysis field within the performance measure details (the field is located in the Additional Details section), not the action plan section.

**Tracking Data section** of the performance measure – Tracking data is where performance data is recorded for a time period. One of the new features in the system is much greater flexibility in the tracking data and frequency.

20. **Unit Type** - Identifies the unit of measure: Number, Dollar, or Percentage.
  - A selection is required for submittal.
  - Field is tied to status; changes will be draft until the measure is approved.
21. **Unit Label** - Provides the user an ability to enter a title to provide more detail, this field will print on the Y-axis for reports.
  - Optional for submittal.
  - Field provides for a maximum of 25 characters.
  - Field is tied to Status; changes will be draft until the measure is approved.
22. **Is Target a Range?** - If checked, then two fields are provided for additional data entry: an upper and lower target.
  - Optional for submittal.
  - Field is tied to status; changes will be draft until the measure is approved.

- If a target is a range and the user changes the target to "not a range" the system will use the lower target value. If a target is not a range and the user changes to a range the system uses the value for the lower and upper target values.
23. **Is Ratio** - Ratios allow a measure is to be composed of two numbers: a numerator (e.g. applications completed per period) and a denominator (e.g. total applications under review per period).
- If checked, then a numerator and a denominator fields are provided for actuals on the tracking.
  - When checked, two additional fields are provided for additional information on Reports and titles entered will display on the tracking data input screen as column header titles.
  - Ratio Numerator and Denominator Title – Provides for a title to display on reports.
    - Titles are optional to submit.
    - Field allows for a maximum of 25 characters.
    - Fields are tied to Status; changes will be draft until the measure is approved.
  - The column header label of Actual (Numerator) and Actual (Denominator) will be replaced with the user entered Ratio titles for the performance measure.
24. **Frequency Type** – Defines the data collection frequency of the measure.
- One performance measure can only have one frequency for all biennium of data.
  - The system will prevent frequency changes if estimate, target, actual or comments exist.
  - One selection is required to save the measure.
  - The first day of the week is Sunday. A quarter starts and ends on a three month cycle/span within a fiscal year/Biennium. (July, Oct, Jan, Apr).
  - Field is tied to status; changes will be draft until the measure is approved.
25. **Precision** - Identifies how many places after the decimal are to be used for the measure.
- Zero, one, or two places to the right of the decimal are options.
  - Field is not tied to workflow; a change will change all instances of the measure.
  - Decimal places will truncate when the level of tracking amount precision is decreased. If a user decreases the level of tracking amount precision, the system will warn the user that data will be truncated.
26. **Direction of Success** - Which direction is better performance: increasing, decreasing, or no change (staying the same)? The direction will help a reviewer place relevance to data trend direction.
- Optional for submittal.
  - Field is tied to status; changes will be draft until the measure is approved.
27. **Tracking Periods** – section displays the tracking period, period end date, Actual, Target, Estimate, and tracking period comment for the measure.
- How to:** Tracking Data displays as **Read-only, to modify check one or more periods then select the Update button.** Note: **If there are changes to the measure an Apply selection must be made prior to the Add/Update tracking data button selection.**
- Tracking period data updates are tied to Status, changes will be draft until the measure is approved.
28. **Biennium** - The two fiscal years that contain the biennium that supports the Budget process. Contains the tracking period biennia for the performance measure. **If biennium selection is blank, use the Create Biennium button.**

**How to:** Use the "Create Biennium" button if biennium selection is blank or to add additional tracking biennia. Note: If there are changes to the measure an Apply selection must be made prior to the Add/Create/Delete Biennium button selection. (See page 54 for how to bulk update biennium using the Roll Tracking Data)

- To remove a biennium and its tracking periods, use the "Delete Biennium" button.

**Once a Biennium exists for the measure the following Tracking fields will display:**

**Period:** A numeric indicator related to the sequence of end dates. Numeric indicators are system generated.

**End Date:** The date the measure period ends on, displays as Month/Day/Year. Field is system generated based on Biennium and Frequency Type.

**Actual:** Actual Performance for the measure period.

- Optional field for submittal.
- Maximum entry is 12 digits to the left of the decimal and 2 digits to the right. When tracking data ratio has been selected a numerator cannot be entered without a denominator (and vice versa.)

**Target:** A best guess estimate about what future performance will achieve, regardless of the strategic intent and implementation of any changes.

A target is a statement about what the organization intends to do, and its commitment of resources. If an organization sets a target at a level different from current performance capabilities, it implies that the organization will improve the process, or adjust resources needed to accomplish the changes that will result in improved performance. Targets help the reader understand what to expect and what good performance looks like.

- Optional for submittal, unless an actual exists for the period, then a warning message is displayed on submittal.
- Maximum entry is 12 digits to the left of the decimal and 2 digits to the right. When the tracking data range has been selected a low target cannot be entered without a high target (and vice versa)
- Target data is displayed on RPM reports.

**Estimate:** Sometimes the data and analysis is sophisticated enough to project future performance based on many factors. When an advanced statistical projection isn't possible, a simple "best guess" estimate of future performance can be provided. Estimating future performance would not make sense for every measure, such as a measures reporting on new programs without much data.

- Optional for submittal.
- Maximum entry is 12 digits to the left of the decimal and 2 digits to the right.
- **Estimate data is NOT displayed on RPM reports.**

**Comment:** Text field to capture information about the data.

- Optional for submittal.
- A maximum of 255 characters is allowed.

29. **System Data Pulled From** - Provides a means to cite the source of the data, including the person or office that prepared it, the system or report it came from.
- Optional for submittal.
  - A maximum of 255 characters is allowed.
  - Field is tied to status; changes will be draft until the measure is approved.

30. **Date Data Current As Of** - Date the data was last updated based on the source data. Used to help display the lag in the measure data.

**How to:** Select the **calendar icon** to select a Month/Day/Year.

- Optional for submittal.
- Field is tied to status; changes will be draft until the measure is approved.

**Associations section** of the performance measure –

This section allows a performance measure to be associated with different areas of interest to the agency, including, budget Activities, agency programs and sub-programs, and partnership agencies for GMAP.

The screenshot shows the RPM interface for 'Results through Performance Management'. The breadcrumb trail is 'Performance Measures > Manage Performance Measure'. The current measure is 'Performance Measure: 001694 - Average number of days it takes to fill a posted job vacancy per quarter | Status: Draft | In Use By: sara PMMS-agyops'. The 'Associations' section is expanded, showing 'Agencies' with 3 records. A filter is applied: 'Lead and Partnership Agencies Only'. The table below shows the associated agencies:

Lead	Partnership	Code	Title
<input type="checkbox"/>	<input checked="" type="checkbox"/>	103	Department of Commerce
<input type="checkbox"/>	<input checked="" type="checkbox"/>	105	Office of Financial Management
<input type="checkbox"/>	<input checked="" type="checkbox"/>	124	Department of Retirement Systems

Below the agencies section, there are sections for 'Related Performance Measures' (0 records) and 'Hierarchies' (2 records). The hierarchies table is as follows:

Parent	Child	Has Children	Number	Title	Status
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	001849	KK_Manage_Hier_Display execution, AGENCY 124 (PARTNERSHIP)	Draft
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	001850	CHLD 2 of the partner agency	Draft

**What are Lead Agency and Partnerships?** - The lead agency has primary responsibility for the measure. Partnership agencies also contribute to the measure. Each agency assigned to the measure are joint owners with access to modify the measure contents.

31. **Agencies** - A Lead agency is required to save a measure.

**How to: Uncheck Lead and Partnership Agencies Only option, select the Filter Button. Check the Agency, then the Set/Unset button.**

- This is not tied to workflow; a change will change all instances of the measure.
- A partnership agency is optional for a measure.
- No 'Set Lead' Button on Lead and Partnership Agency grid exists for Edit users, or for Agency Edit and Agency Operations users when the measure has a usage other than only that of Internal.
- Agency Operations user can change the lead agency for measures with only a usage type of internal.

32. **Related Performance Measures** - Provides an ability to list any measures that have a contextual or direct relationship to the current measure. Note: **If there are changes to the measure an Apply selection must be made prior to the Add related performance measures button selection.**

**How to:** Select the **Manage button**, on the next screen filter to limit the performance measures, then **check the measure box then the Set/Unset Related measure button. Select Save** to continue to update the measure.

- Select none, one, or many measures from the lead or partnership agencies.
- Optional for submittal.
- This is not tied to workflow; a change will change all instances of the measure.
- **Remove** button will remove the relationship between the selected performance measure and the performance measure currently being managed.
- **Update** button will navigate you to the selected performance measures details screen to make updates.

33. **Hierarchies** – A hierarchy in the RPM system is a mathematical link 'parent-child' relationship between performance measures. This system feature will allow for the more detailed entry of performance data (at a program, region, or office level) and the ability to aggregate and display the performance data at an agency/statewide roll-up level.

➤ See page 74 for additional hierarchy information.

**How to:** To add or remove child for current performance measure, use the **Manage** button.

**How to:** To update a performance measure in the hierarchy, use the **Update** button.

**How to:** To view in outline form all performance measures in the hierarchy, use the **Hierarchy Tree** button.

The screenshot displays a web application interface with three main sections: **Supported Activities**, **Programs**, and **Subprograms**. Each section shows a status of "0 Records" and a "Show Filter" button. The **Supported Activities** section has a "Supported Only" checkbox checked and a "Biennium" dropdown menu open, showing options for 2011-13, 2009-11, 2007-09, 2005-07, and 2003-05. The **Programs** and **Subprograms** sections have their "Supported Only" checkboxes unchecked. The interface also includes "Filter Data", "Reset Default Filter", "Set/Unset Supported", "View", "Clear Sort", and "Reset Default Sort" buttons.

### 34. **Supported Activities** - Only Budget Activities for the Lead Agency are displayed.

**How to:** Uncheck **Supported Only** then the **Filter Data** button. Select the **Biennium** then the **Filter Data** button. Check the **Activity** then the **Set/Unset Supported** button.

- Select none, one, or many Budget Activities that the measure supports.
- If the measure contains a Usage type of Budget, then at least one Activity from the current biennium for the lead agency must be selected prior to submittal. Other Usages types can contain Budget Activities, but this is optional for submittal.

- The system provides the ability to choose the biennium for selection of Activity Inventory descriptions to link the performance measure to activities.
  - System provides a read-only view of activity descriptions from within the Results through Performance Management system. Activity Descriptions cannot be updated from the Results through Performance Management system.
  - A performance measure cannot be linked/associated to an Activity that contains a Performance Measure Lock in the Activity system.
  - This field is not tied to workflow; a change will change all instances of the measure.
35. **Programs** - Provides the ability to choose none, one, or many programs that support the measure. The programs listed are those that have been setup for the biennium in the Budget Development System (BDS).

**How to: Uncheck Supported Only then the Filter Data button. Check the Program(s) then the Set/Unset Supported button.**

- Program list is based on the Lead agency.
  - Optional for submittal.
  - Field is tied to status; changes will be draft until the measure is approved.
36. **Subprograms** - Provides the ability to choose none, one, or many subprograms that support the measure. The subprograms listed are those that have been setup for the biennium in the Budget Development System (BDS).
- How to: Uncheck Supported Only then the Filter Data button. Check the Subprogram(s) then the Set/Unset Supported button.**
- Only those Subprograms for the selected Program will display for selection.
  - Subprogram list is based on the Lead agency.
  - Optional for submittal.
  - Field is tied to status; changes will be draft until the measure is approved.

## **Attachments section** of the performance measure –

This section provides the ability to attach files and links to other documents to a measure, such as background information, reports, maps, and web sites. For instance, a hyperlink can provide a reference to a goal or objective in the agency's strategic plan (if this is provided on you agency's web site.)

The screenshot displays the 'Results through Performance Management' web application. The header includes the RPM logo, the title 'Results through Performance Management', and user information: 'Enterprise Reporting', 'Contact', 'Help', and 'Log Out'. The breadcrumb trail shows 'Performance Measures > Manage Performance Measure' and the user 'Sara2 Corbin : 477 - Department of Fish and Wildlife'. The main content area shows the 'Performance Measure: 002143 - Average number of days it takes to fill a posted job vacancy per quarter | Status: Draft | In Use By: Sara2 Corbin'. Below this, there are tabs for 'Definition', 'Uses', 'Additional Details', 'Tracking Data', 'Associations', and 'Attachments'. The 'Attachments' tab is active, showing 'Files' and 'Hyperlinks' sections, both with '0 Records' and 'No records to display'.

37. **Files** - Users can attach additional and supporting documents for the performance measure. If a file is attached, a text description of the file, up to a 255 characters, is required to save the attachment. Note: **If there are changes to the measure an Apply selection must be made prior to the Add Files button selection.**

**How to:** Select **Add** button, then **Browse** button to **select a file** by navigating to the local or network drive where the file is stored. **Enter a description, and select Save.**

- Valid file types include: Microsoft Word (doc, docx,) Excel (xls, xlsx), PowerPoint( ppt), Project (mpp), Acobe Acrobat (pdf), and some image files (gif, png, jpg, jpeg, tif, tiff | Maximum File Size: 3 MB.
- This field is tied to status; changes will be draft until the measure is approved.

38. **Hyperlinks** - Add a web site link, a display text and description (255 characters) of the site are required to save the URL on the ADD. Note: **If there are changes to the measure an Apply selection must be made prior to the Add Hyperlinks button selection.**

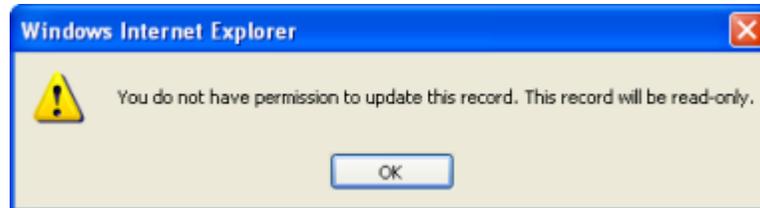
**How to:** Select **Add** button, then **enter the URL, enter the display text, and enter a description, and select Save.**

- Additional and supporting documents for the performance measure.
- This field is tied to status; changes will be draft until the measure is approved.

## Copy to Draft (Create an updateable copy of a measure)

On the **Performance Measure list** screen the following feature **Copy to Draft** button is provided.

A performance measure with an official usage type and a status of Approved cannot be updated. The following message displays, and states the measure is Read-Only.

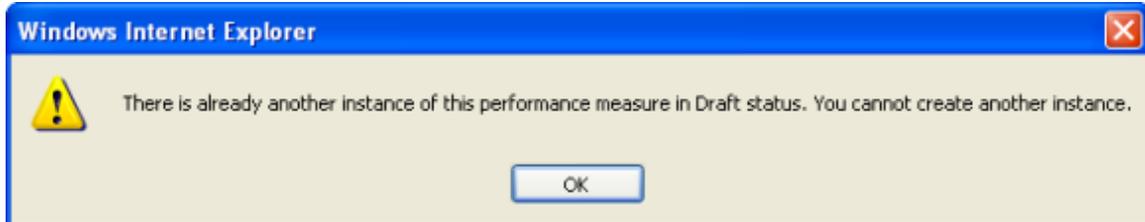


Thus, to edit or update a measure, a copy of the Approved measure must first be created. The copy will contain a status of Draft and be available for update.

**How to:** create a copy for editing, **check the box on the line of the Approved performance measure needing update, then select the ‘COPY TO DRAFT’ button. Select the measure with the Draft Status, then the Update button (or Tracking button.)**

Note:

- A second draft measure cannot be created if a draft status for a measure already exists.



- A draft measure cannot be created if a under review copy exists.
- A performance measure with only the usage type of Internal and with an Approved status can be updated by the security role of Agency Operations. When both an approved and a draft copy exist for the same measure a warning message is displayed that any changes to the approved may be overridden when the draft copy becomes approved.

## Export/Import of Tracking Data

On the **Performance Measure list screen** the following features **Import** and **Export** buttons are provided.

The Export and Import feature allows for tracking data to be copied into an excel workbook. This allows for bulk changes/modifications to be made to the tracking data in a one step process. Use the Import to update tracking amounts in a measure and add comments.

- This feature also helps when many biennia of historical data exist, and a frequency change for a performance measure is needed to be made.
- Additionally, when tracking data will need to be sent to external sources that do not have access to the RPM system, the export may be a good means to share performance data.
- Multiple measures may be selected for export/import at the same time.
- The system provides the ability to export inherited (see list of fields in the Hierarchy section of user guide) and rolled up tracking data and comments at any level in the hierarchy.
- The system provides the ability to import tracking data and comments only at the lowest level of the hierarchy. Parent measures that display derived tracking data will not allow for import of tracking data.

### ***How to Export***

- The system will not allow for the export of multiple statuses of the same measure at the same time.
- Any performance measure status may be exported.
- The tracking biennia available for export are based on the measures selected. Not all Measures will contain data for all of the tracking biennia listed. All biennia or a combination of available options may be selected. (Shift button is used to select a range, Ctrl button is used to select individual items)

**How to:** Select the performance **measures** on the PM List screen by placing a check in the box for the identified performance measure, **then the Export button**. Next, **select the tracking biennia to be exported**, then the **EXPORT button**, a dialog box for File Download will display. Choose one of the three options:

- Open (to view the excel file with the exported data)
- Save (to assign a file name to the exported data and a location the file will be saved to, after the save button is selected on the 'Save As' dialog box, the file is automatically saved and you are left on the Export Performance Measure screen.)
- Cancel (to exit from the export File Download dialog and return to the Export Performance Measure screen.)

## ***How to Import***

- Only Draft and Returned status measures may have performance data imported into them.
- A file cannot be import into a measure with a status of Approved or Under Review.
- The import will not create a draft copy of a performance measure; one must exist prior to the import process.
- The tracking biennia must exist in the performance measure prior to the import (i.e., if you are importing 09-11 data, then the 09-11 biennia tracking buckets must exist in the performance measure.)
- A file cannot import data into performance measures that is "in-use", being updated by another user.
- Multiple statuses of the same performance measure cannot be uploaded at the same time.
- Values provided in the file, including blanks, will overwrite values in the tracking data.
- Import of tracking data will only overwrite existing tracking data during import (Actual Amount, Actual numerator amount, Actual Denominator amount, Target, Target Upper Amount, Target Lower Amount, Estimate, and Comment) all other performance measure fields will not be updated.
- Importing data will not support formulas.
- Importing data will only look at the first worksheet within a workbook.
- Lead and partner agencies can import/export performance measure tracking data.
- Duplicate records, rows within the excel document with the same performance measure number and End Date within the Excel file cannot be imported in to a performance measure.
- Data will import to measure for measure number and tracking period
- Tracking Data cannot be imported into parent (roll-up) measures in a hierarchy. Delete all parent (roll-up) rows from the export file prior to importing tracking data into the hierarchy.

The columns must exist in the file and in the same order as when exported.

**Key columns required to contain data for import are:** *Number and End Date*

**Only one combination of the following can be entered for a measure** (and on the import will be validated against the measures setting): either an Actual; or both Actual (Numerator) and Actual (Denominator)

**Only one combination of the following can be entered for a measure** (and on the import will be validated against the measures setting): either a Target; or both Target (Lower) and Target (Upper)

**Last two columns in the file are:** *Estimate and Comment*

**How to: Select the Import button on the Performance Measure List screen.** A warning message states that the Tracking Data will be overwritten by the contents of the imported file. After selecting the **OK button**, the ability to select the file for import will be available. Select the **Browse button**, on the **Choose File** dialog box, select the file to be imported, then the dialog will close. On the Import Performance Measure screen, select the **Import button**.

On import one of two things will occur:

- If the import is successful, a message will display that states File Import Successful.
- Or
- If the import is not successful, the system provides an Import Edit Report, with all errors, including line numbers and columns in error. It will be displayed when items will need to be modified before the data can be imported. The report will also be available to be printed.

## How to Manage Agency Contacts

Located on the application tab bar listed at the top of the screen under the application title Results through Performance Management, the **Agency Contacts** tab is available to those with Agency Budget Operations security.

This feature provides a means to create and manage your agencies contacts that can be added to performance measures and action plans. Contacts can be individuals who can provide additional explanation about the measure, who should be included in measure or action plan modifications, or to help identify individual ownership of the measure or action plan.

Agency Contacts must first be added to the Agency Contacts tab before they are available to be added for each performance measures in the measure details (Additional Details section) or added to an action plan.

**How to:** Select the **Agency Contact** tab at the top of the screen. Select the **Add button**. Enter a First Name, Last Name, Email Address, Phone Number, Select the **Save button**.

Only Agency Operations security level can update Agency Contacts for their agency; this feature is not available for Agency Edit Access security levels.

- Feature provides the ability to mark a contact as active or inactive on this screen.
  - Inactive contacts will not be available in list boxes for selection to add to a measure.
- Contacts can be deleted if they have not been used and be marked inactive if they have been used. (Contacts can be removed from a performance measure or action plan.)
- When adding a contact the following fields are required: first, last name, e-mail, and phone (area code, prefix, and suffix.) Note: the extension is optional.

First name - field provides for a maximum of 40 characters.

Last name - field provides for a maximum of 40 characters.

Email - field provides for a maximum of 40 characters.

Phone Number -

Area code char - 3 digits.

Prefix - 3 digits.

Suffix - 4 digits.

Extension - field provides for a maximum of 4 digits.

## How to Manage Themes

Located on the application tab bar listed at the top of the screen under the application title Results through Performance Management, the **Themes** tab is available to those with Agency Budget Operations security.

Themes are used to create custom topic areas for performance reporting. Themes provide a way for an agency to categorize, tag, or otherwise identify measures as being associated with a certain topic. For instance, a measure could have a theme of Toxics – Air Pollution.

Internal themes are defined by Agency Operations users, and are then available to be added to an agency's measure within the Uses section.

**How to: Select the Themes tab** listed under the system name, **select Add, enter title, Select Save.**

- Mark themes as Inactive if no longer valid/relevant using the Update button.
- Internal Themes created will be unique to your agency.
- Themes that have not been used can be deleted, but a theme cannot be deleted if it is tied to a measure. When this is tried a list of measures where the theme has been used will be displayed (list is also available for print).
- Inactive themes will not be available in list boxes for selection to add to a measure.
- Only Agency Operations security level can add/update internal themes, feature is not available for Agency Edit Access.

## History Log (Performance Measure log)

The History Log provides a list of significant actions made to a performance measure.

**How to:** On the Performance Measure list screen **Select a measures** checkbox, then the **Open History Log button**.

Each occurrence of an action type will display on the history log report.

The system will record the user name (last, first) date and time for all actions listed below.

The system will record the following actions when a performance measure is:

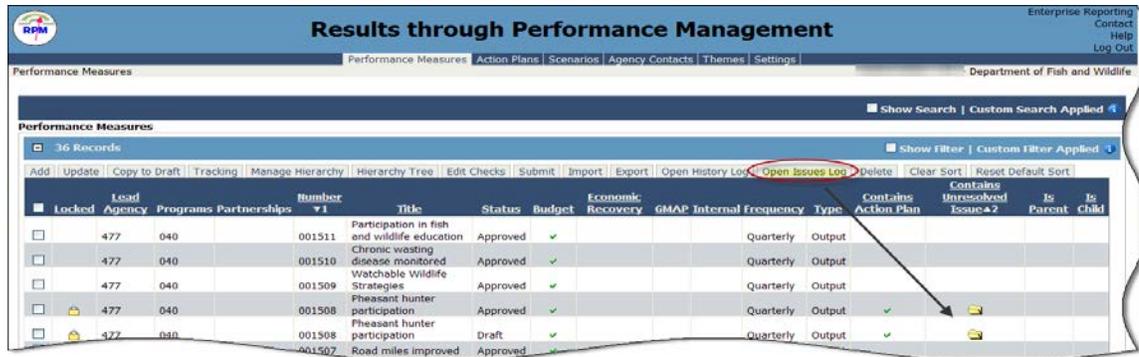
- Created
- Submitted - Under Review
- Submitted - Auto Approved
- Returned by OFM
- Approved by OFM
- Deleted
- Marked Inactive
- Marked Active
- Copied to Draft

The system will record the following edit (update) actions when changes are made to the:

- Definitions section
- Uses section
- Additional Details section
- Tracking Data section
- Associations section
- Attachments section
- For measures that are part of a hierarchy, when a measure is linked or unlinked from a hierarchy, including its child/parent, measure number and title, time, and by whom.
- Log in history for each measure in the hierarchy when Hierarchy attributes, Roll-up or Not Roll-up target and estimates, hierarchy type (sum, average) are changed.

# Issues Log

Issues Log is the part of the system that facilitates communication between OFM analysts and agency analysts as errors, problems, or concerns arise, or just when further clarification is needed. It provides a means where either the OFM analyst or the agency analyst can create issues about a performance measure and carry on a threaded conversation about an issue, and to include attachments as necessary.

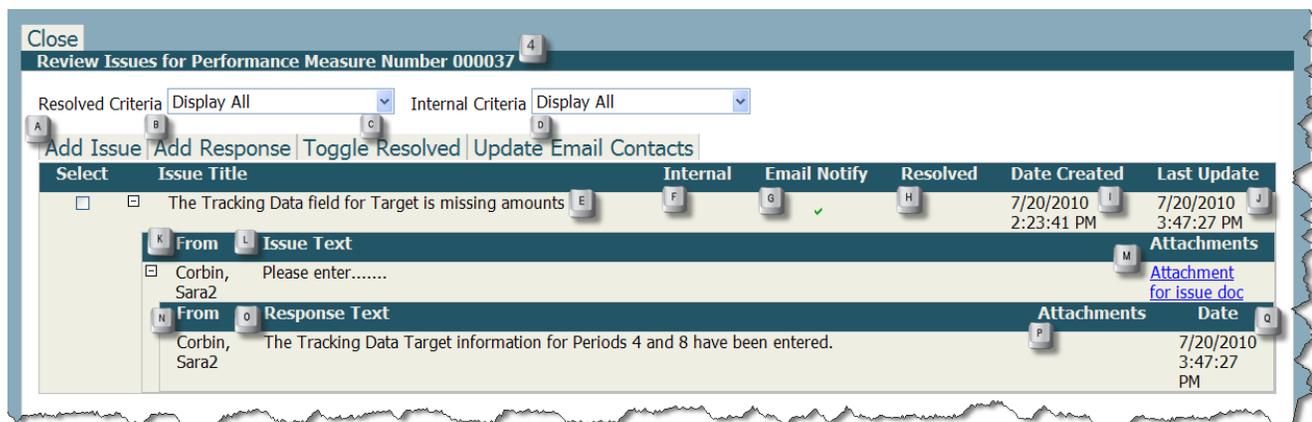


On the Performance Measure List screen a column in the measure list grid titled 'Contains Unresolved Issue' will display a folder icon where a measure has an outstanding issue.

Issues can be added to all measures regardless of status. A single unresolved issue can be accessed from either the working instance or the approved instance of the performance measure.

In the Issues Log you may add an issue or response. A single unresolved issue can have many questions and many responses.

1. On the **Performance Measure List** screen, Select the checkbox of the measure, then the Open Issue Log button.
2. A new window will open to display the Issues Log.



3. There are two ways to filter and find issues:
  - **Resolved Criteria** – relates to the issue state. Options: Display All, Display Resolved Only, Display Non-Resolved Only.
  - **Internal Criteria** – relates to the viewable characteristics of issues to your agency. Options: Display All, Display Internal Only (Only your agency will be able to view Internal issues), Display Non-Internal Only (issues viewable by OFM and your agency).

4. A status line will display the performance measure number for the issue.
5. Action button
  - a) **Add Issue** – used to add a new issue item.
  - b) **Add Response** – used to add a response to an existing issue.
  - c) **Toggle Resolved** – used after selecting the issue to be marked resolved.
  - d) **Update Email Contacts** – used after selecting the issue to view and update email contacts for the issue.
6. **Select** – checkbox used to select issue for action.
7. The high level details about the issue are displayed:
  - e) Issue Title
  - f) Internal (those checked are only viewable by your agency)
  - g) E-mail notification (indicates if there are e-mail contacts for the issue)
  - h) Resolved those checked indicate the issue has been resolved)
  - i) Date Created
  - j) Last Updated
8. Expand the + or Collapse the – to view the issues. *The body of the issue can only be seen when you expand the issue by selecting the “+”.*
9. More information is displayed when the issue has been expanded:
  - k) The From (the name of who created the issue)
  - l) Issue Text
  - m) Attachment link if one was included in the Issue Text
  - n) The From (the name of who responded to the issue)
  - o) Response Message
  - p) Attachment link if one was included in the Response Text
  - q) Date of issue entry

### **Issues log within the Performance Measure Detail**

When an open issue exists for a performance measure, a tab will display within the Performance Measure detail screen. By selecting the **Open Issues Log** tab, you may response to the issue or add a new issue. A new window will open and display the Issues log, and allow for updating to continue in the measure.



## ***How to Add an Item to the Issues Log***

10. From the Performance Measure List screen, **select** the checkbox for the **measure**, then the **Open Issues Log button**.
11. **Select the ‘Add Issue’ button** to enter a new issue for the performance measure.
12. **Enter an Issue Title**, the title is displayed on the issue screen.
13. If this issue is not intended to be a dialogue with your OFM Analyst, place a checkmark next to ‘Internal’. Only your agency will be able to view Internal issues.
14. **Enter the text of the issue** in the dialog box to describe what needs to be resolved.
15. If a document will help to resolve the issue.
  - a) Enter a title for an attachment.
  - b) Select the Browse button to locate the file.
  - c) Select the Add button to add the attachment to the issue.
16. **Select e-mail recipients for the issue.**
  - **By using the ‘...’ icon button** for a list of contact. The contacts listed are based Agency Budget Portfolio Security records, those individuals who have RPM security for your agency will be listed for selection.
  - **By default OFM Analysts are listed as recipients for the issue.** Remove any e-mail addresses that should not be notified.
  - **There is an ability to add additional e-mail addresses by typing in the e-mail address manually.**
  - The email contacts who will be notified when an Issue is created or Issue Response is added for the performance measure.
17. When Finished **select** the **Save** button to finalize modifications. (Use the ‘+’ to expand issue if needed.)
18. **Select the Close button** after work in the issues log for the performance measure is complete.
19. **If the issue is the first for the measure, select the Load Data button on the Performance Measure list screen to view the folder icon for the measure.** A screen refresh is needed to view the recent change to the measure.

## How Do I ....Complete this business process section

***Inactivate a measure?*** Make an Inactive measure active again? Contact your OFM Budget Analyst or OFM Operations Analyst to ask for measures with Official usage types to be inactivated. For measures with the single usage type of Internal, an Agency Operations security level user can mark the measure as inactive. Inactivating a measure in any status will inactivate the measure in all statuses.

***Delete a Measure?*** Both Agency Edit Access and Agency Operations security levels can delete draft performance measures. Draft measures with one usage type can be deleted. Only Agency Operations security level can delete a measure with the single usage type of Internal that is in approved status. One or more measures can be deleted at a time.

Only the lead Agency can delete a measure when a measure is shared by Partnership agencies.

Only OFM Operations users can delete an approved official measure with one usage type from the RPM system. Any working copies (draft or returned) of the measures must be deleted prior to deleting the approved copy. An approved performance measure cannot be deleted if the same performance measure is in either draft, under review and/or returned status. The draft and/or returned performance measure(s) must be deleted first. Under review must be returned.

***What happens if I released a Measure by accident?*** There is not a Recall feature in RPM. If the measure was auto approved, create a copy of the approved version to modify. If the measure is in a status of Under Review, contact your OFM Budget Analyst to have it returned if additional modifications are needed.

***Link Performance Measures to Activities?*** Performance Measures with a usage type of Budget must have a Budget Activity marked as being supported. On the Associations tab, under the header Supported Activities, Uncheck the filter option to 'Show Supported', select the biennium, then the Filter Data button. Place a check next to the Budget activity that the performance measure supports then the Set/Unset supported button.

***Agency Contacts Changes?*** When a measures Agency Contact has left the Agency, or an Agency contact should no longer be a measure contact: Mark a contact as inactive or remove a contact from a measure. Add a new contact to a measure from within the measures additional details section. Update the name on an existing contact within the Agency Contacts feature and all measure will be updated for new information.

### ***Can't see Edit Check Report a Pop-up Blocker Setting***

Some features such as Open History Log, Edit Check report, and Export that will need to be displayed in a new internet explorer window. When they do not appear in a new internet explorer window, your IE pop-up blocker settings will need to be adjusted. When pop-ups have been selected as an IE option, go to Tools, Pop-up Blockers, Turn Off Pop-up Blockers. Turning off pop-up blockers will allow the feature to execute.

***Can't find my Measure? Search and Filter Settings*** – When items do not appear in the performance measure list, review both the search and filter setting selections.

**Measure Status displayed for Hierarchies Tree and Scenarios Tree are not correct** – When the measure status displayed on the Hierarchy Tree or the Scenario Tree is not as expected. If more than one status exists for a performance measure, the measure displayed will be based on the **Preferred Performance Measure Status selection** on the **Settings Tab**.

**Change the Frequency of a Measure?** The performance measures frequency will be tied to the each tracking biennia within the measure. A performance measures frequency cannot be changed when tracking biennia exist for the draft measure.

All tracking biennia must first be deleted from the draft performance measure prior to changing a measures frequency. (To delete use the *Delete Biennium* button in the Tracking Data section of the measure details)

An Export feature is provided within the system to help in a measures frequency conversion, all tracking biennia data can be exported if needed.

## **Steps to Change a Performance Measure Frequency**

**How can I convert quarterly performance measures to annual (or some other frequency) in RPM?**

1. **On the performance measure list screen, select** the measure then the **Copy to Draft** button to create an updateable copy of an approved measure.

Note: only the performance measures draft (or returned) status instance can be updated to delete tracking biennia, select a new frequency, create tracking biennia, perform an import of the tracking data, and enter tracking data.

2. **On the Performance Measure List screen, select the performance measure approved instance** that contain the data which you want exported, then **select the “Export” button**.
  - a. **Retain** the Tracking Biennium to Export ‘All’ indicator, then **select the Export button, then Select the Save button**.
  - b. **Select a location to save the excel document, Enter a File name, the select the Save button**.
  - c. All the existing estimate and target data will be copied to an Excel spreadsheet. Note: You can use this as a record of existing amounts, or import it back into the measure.
  - d. **Select the Cancel button** on the Export Performance Measure screen to navigate back to the Performance measure list screen.
3. **Select the draft instance the performance measure** you would like to change the frequency for, **then the Update button**.
4. **Select the Tracking Data section button** of the measure detail.
5. **Under the Tracking Periods section, use the “Delete Biennium” button** to delete the existing tracking biennia. Note: the Approved copy will retain the tracking biennia until a new instance of the measure is in Approved status.
  - a. **Choose the “Delete Biennium” button; choose the biennium you want to delete, and then the Delete button. Select the OK button to permanently delete the tracking biennium from the Draft instance of the measure. [Repeat until no tracking periods remain]**

6. **Change the Frequency Type** to “Annual” (or weekly or monthly)
7. **Select the Apply button** at the top of the screen.
8. **Under the Tracking Periods section**, use the “**Create Biennium**” **button** to create the biennia for the tracking data.
  - a. **Choose the “Create Biennium” button; choose the biennium you want to add, and then the Create button. [Repeat until all tracking periods that are needed have been created for the measure.]**

Note: Tracking data can be added to the newly created biennia, or you can continue to follow the steps below to import tracking data from the excel spreadsheet.

9. **Select the Save button** at the top of the screen, to save changes and navigate back to the Performance Measure List screen.
10. **Locate the Excel file with the export tracking data, and open the file to manage the data.**
  - a. Do not delete the first row of the spreadsheet, or any columns within the spreadsheet. The this information is needed for the import process to complete.
  - b. Delete the now-unused quarter rows, leaving rows with annual data in them.
  - c. The following fields in the spreadsheet are for informational purposes: Title, Status, Frequency, Biennium, and Period. No update of these fields is needed.
  - d. Verify that the new frequency period end date for each biennium exists in the spreadsheet with the correct tracking data. For example, The 2009-2011 biennia for an annual frequency consists of period one that ends of 6/30/2010 and period two that ends on 6/30/2011. The import will look for each measure Number, End Date, Actual, Target, and Estimate.
  - e. Save and close the file.
11. **On the Performance Measure List screen, select the Import button.**
12. **Select the OK button**, to overwrite tracking data in the *draft* instance of the measure. The approved versions tracking data will not be changed on the import.
13. **Select the Browse button, locate the excel file to import, then the Open button.**
14. The file path will display to the left of the Browse button, **then select the Import button** to complete the import process.
15. If any errors are detected on the import, an Import Error Report will be displayed. All import error will need to be cleared prior to a successful import.
16. A message will display that the import was successful, then select OK.
17. Select the Cancel button to navigate back to the Performance Measure List screen.
18. Official OFM budget measures that have tracking period changes will need to be submitted to and approved by OFM.

### ***Create a Hierarchy using a measure with an Approved instance containing tracking data as the parent***

If needed, Export tracking data from the Approved measure. Create a draft copy of the Approved measure, using the copy to draft button. Delete the Tracking Biennia from the draft instance, using the Delete Biennium button located in the Tracking Data section of the measures details (delete all biennium). Submit the Draft instance of the measure, using the Submit button on the performance measure list screen. The measure will now become automatically Approved by the system. Create a draft copy of the Approved

measure, using the copy to draft button. On the performance measure list screen, select the draft measure then the Manage Hierarchy button. Select a Hierarchy Attribute (summary or average), then the save button. Select the Add New Measure As Child button or an existing measure (then the Set/Unset Child button) to create child measures for the parent. Create the Tracking Biennia from the draft instance of each child measure, using the Create Biennium button located in the Tracking Data section of the measures details.

## How to Update Measures for OFM Quarterly Reporting

**Only measure in a status of Draft can be updated.**

1. On the Performance Measure List screen, select by **checking the box for each measure in Approved** status that does not have a second instance in Draft/Under Review/Returned.
2. With all the measures that need to be updated checked, **then select the Copy to Draft Button**. This will create an updatable copy of the measure(s).
3. **Select measure(s)** that require their tracking data updated, **then select the Tracking button**.
4. On the Manage Tracking Amounts screen, **Update each tracking field as needed**. Tracking periods in the past or future can be updated.
5. Use the navigation buttons to advance to the next measure, retain the check mark for Save on Navigation (saving all changes prior to advancing to the next record.)



6. After the last update on **the last measure, select the Save Button**.
7. **Select all measures in Draft status** needing to be submitted. Note: Select the Filter option for Status on the Performance Measure List Screen: check the box for Draft measure, then the Load Data button.
8. **Select the Submit button** on the Performance Measure list screen.
9. If there are Critical error messages, resolve for the indicated measures and submit again.

## When Tracking Biennia are not displayed for my measure

Ensuing biennia are not automatically added to the measures Tracking Period biennia dropdown list. This will be a step taken by the agency for each measure in need of the new biennia.

### Update Tracking Biennia for a single measure

1. On the Performance Measure List screen **check the draft** (or returned) **measure(s)** that are in need of additional biennia, **then the Tracking button**.
2. On the Mange Tracking Amounts screen, **select the “Create Biennium” button** at the top of the screen.
3. **Select the Biennium from the list box, and then Select the Create button**.
4. Complete these steps for each measure in need of the new biennia. Note: if multiple measures were selected, use the navigation arrows to advance to the next record to update the Tracking Periods section.
5. Note: After the above steps have been completed, you must select the Biennium from the dropdown list then the Filter Data button to switch between biennia in the Tracking Periods section.

## Update Tracking Biennia for multiple measures

- On the Performance Measure List Screen, select one or more performance measures
  - Measures must be in Draft or Returned Status to update biennium
- Select the **“Roll Tracking Data”** button

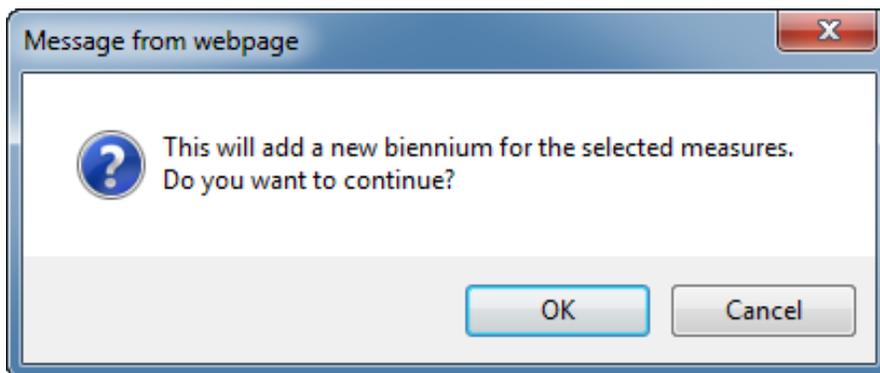
The screenshot shows the 'Results through Performance Management' interface. At the top, there is a navigation bar with 'Performance Measures', 'Action Plans', 'Scenarios', 'Themes', 'Reports', and 'Settings'. Below this is a filter section with options for Status, Contains Action Plan, Tracking Period Frequency, Type, and Part of Hierarchy. A table of performance measures is displayed below the filters. The 'Roll Tracking Data' button is circled in red in the top right corner of the table area.

Locked	Lead Agency #1	Programs Partnerships	Number #2	Title	Status	Budget	Economic Recovery	GMAP	Budget Sound	Internal	Frequency	Type	Contains Action Plan	Contains Unresolved Issue	Is Parent	Is Child
<input type="checkbox"/>	105	030	000211	Helpdesk problem resolution	Approved	✓				✓	Quarterly	Process - Efficiency				
<input checked="" type="checkbox"/>	105	030	000211	Helpdesk problem resolution	Draft	✓				✓	Monthly	Process - Efficiency				
<input type="checkbox"/>	105		111	Percent classifications reviewed annually	Approved	✓				✓	Annually	Output				
<input checked="" type="checkbox"/>	105		111	Percent classifications reviewed annually	Draft	✓				✓	Annually	Output				
<input type="checkbox"/>	105		111	Percent rules reviewed annually	Approved	✓					Annually	Output				
<input type="checkbox"/>	105		111	Percent rules reviewed annually	Draft	✓					Annually	Output				
<input type="checkbox"/>	105		111	Number of agencies/institutions that have completed a Performance Management Confirmation assessment	Approved	✓					Annually	Output				
<input type="checkbox"/>	105		111	Number of agencies/institutions that have completed a Performance Management Confirmation assessment	Draft	✓					Annually	Output				
<input type="checkbox"/>	105		111	Percent of state workforce with current performance evaluations	Approved	✓				✓	Annually	Output				

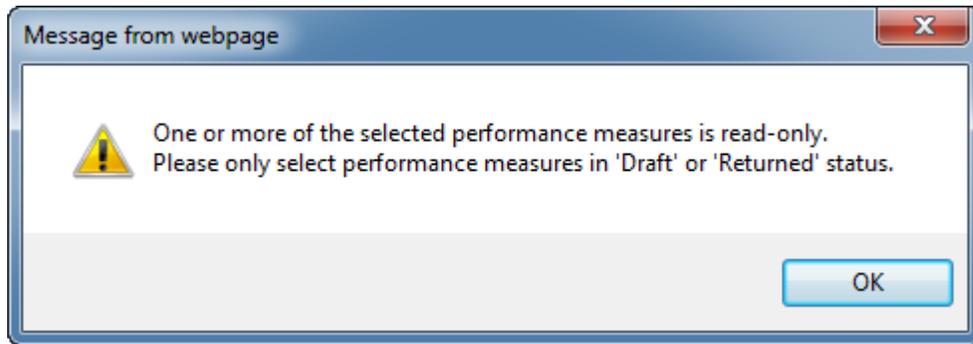
- Select the appropriate biennium from the list and click **“create”** to execute the roll of data or **“cancel”** to return to previous page.

The screenshot shows the 'Results through Performance Management' interface. The 'Create' button is circled in red. Below the button, there is a dropdown menu for 'Biennium of Tracking Periods' with '2013-15' selected.

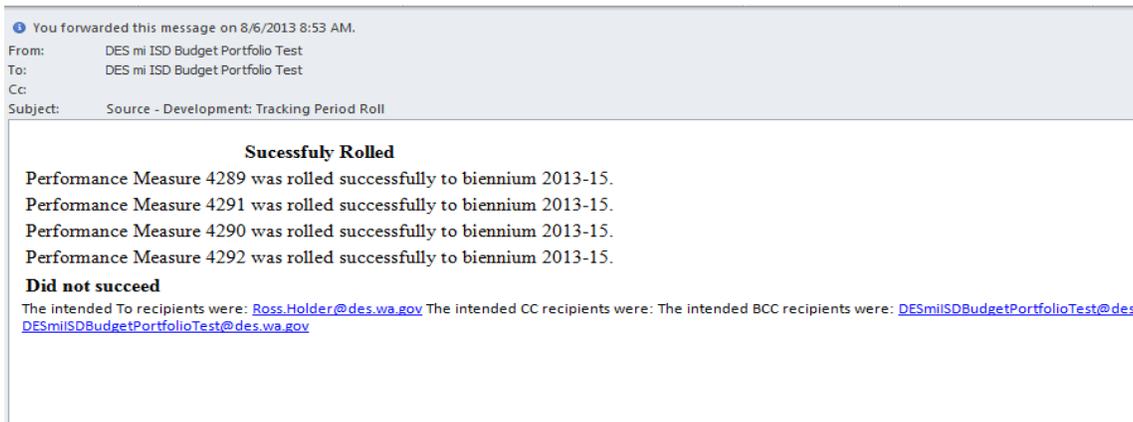
- Select **“Ok”** on the message box to confirm you wish to roll the selected Performance Measures.



Note: If you try to Roll Tracking Data on a Performance Measure not in draft or returned status, you will receive the following message.



5. Once the “Roll Tracking Data” is complete the user will receive an email to confirm a successful or unsuccessful roll of performance measures.



Note: Users with read only access are not permitted to run the “Roll Tracking Data”.

## Submit - Edit Checks - Email with Change Report:

Only those with Agency Operations security can submit performance measures.

By selecting a check next to any measures ready for submittal, then the **EDIT CHECK** button a report will display: any Critical Edits, Warning Edits, and an Informational section.

**How to:** To submit performance measures into the workflow (this includes measures being submitted to your OFM Analyst), place a check next to any measures ready for submittal (make sure the measure is in Draft or Returned status), then select the Submit button.

**Note:** The submit process will run the prerelease edits on the selected measures, then generate the comparison report send via e-mail to the measure contacts and for official usage type measures your assigned OFM Analysts. The separate e-mail with attached comparison report will be sent for each measure submitted.

- Measures with a status of Draft or Returned can be submitted into the workflow.
- All critical edits must be resolved prior to a measure being submitted.
- An e-mail will be sent that include a comparison report attachment listing changes between the last approved measure and the measure being submitted.
- OFM and GMAP analysts will not receive e-mail notifications for Agency Internal performance measures.
- The notification e-mail will contain the Agency number, Agency title, system name RPM, review action, and a comparison report.
- For Performance Measures that go through the Auto approval workflow, the system captures delta changes required to populate e-mail prior to the status change to Approved.
- When Performance Measures are Submit, Returned, or Approved the following will be notified via e-mail: OFM and GMAP assigned analysts, agency contacts listed in the performance measure, and the agency user who submitted the performance measures.

## Edit Checks – Critical and Warning Messages

The following edits will be run on the selected performance measures when the Edit Check or the Submit buttons are selected.

- Edit Checks can be run on multiple measures at any time.
- If any critical messages exist on submittal, the error report will be displayed. The edit check report will provide the option to print to your local printer.

Critical messages are required to be satisfied before a submittal can be completed. Warning messages are reminders that important fields/selections have been missed. Since this information may not be known at the time of submittal warning messages do not stop the submittal process. The informational message lists all performance messages the edit check or submittal process was run on.

If performance measures A and B are submitted and a critical error exists in performance measure A, neither performance measures A or B are submitted. If the submittal fails, the performance measures that were checked for submittal will remain checked.

Edit Check Number	Error Message Displayed on Error Report	Error Type	Performance Measures Usage Type that Edit Applies To	Performance Measure Detail Section where field can be found	RPM will Check for the following:
1	Performance measure ##### does not contain an active contact to receive e-mail notification for the lead agency. A minimum of one active contact must exist in the Additional Details section of the performance measure for the lead agency.	<b>Warning Message</b>	Official and Internal Usage Types	Additional Details	At least one active contact marked to receive e-mail notification for the lead agency per performance measure.
2	Performance Measure ##### does not contain a Description. This field is located within the Definitions section of the performance measure.	<b>Warning message</b>	Official usage types	Definition	When the Description field is blank, warning message is displayed.
3	Performance Measure ##### with a Budget usage type must be associated to a minimum of one Activity. This field is located within the Associations section of the performance measure.	<b>Critical message</b>	Official usage types of Budget only	Associations	A budget performance measure must have at least one activity from the current biennium associated with the lead agency.
4	Performance Measure ##### contains a Geographic Location – Latitude outside the valid range of 45.523104 and 49.023879. This field is located within the Additional Details section of the performance measure.	<b>Warning message</b>	Official usage types	Additional Details	Must be within the boundaries of Washington state.  Only one message per performance measure will display if multiple Geographic Location – Latitude entries exist with errors for the measure.
5	Performance Measure ##### contains a	<b>Warning message</b>	Official usage types	Additional Details	Must be within the boundaries of the state.

	Geographic Location - Longitude outside the valid range of - 116.791626 and - 124.807591. This field is located within the Additional Details section of the performance measure.				Only one message per performance measure will display if multiple Geographic Location – Longitude entries exist for the measure.
6	Performance Measure ##### does not have a Measure Type selected. This field is located within the Definitions section of the performance measure.	<b>Warning message</b>	Official Usage Types	Definitions	When a measure type of Input, Output, Outcome, Process-Efficiency, or Caseload-Workload has not been selected this warning message will display.
7	Performance Measure ##### must have a Unit Type selected. This field is located within the Tracking Data section of the performance measure.	<b>Critical message</b>	Official and Internal Usage Types	Tracking Data	When a unit type of Percentage, Dollar, or Number has not been selected this critical message will be displayed.
8	Performance Measure ##### has an Actual amount without a Target amount for Period XXX. Target fields are located within the Tracking Data section of the performance measure.	<b>Warning message</b>	Official Usage Types	Tracking Data	If an actual exists for a period, then a non-blank target must exist too.  Only one message for each period(s) were an error exists will display.
10	Performance Measure ##### must contain a minimum of one CFDA Number for the usage type of Economic Recovery. This field is located within the Uses section of the performance measure.	<b>Critical message</b>	Official Usage Type of Economic Recovery only.	Uses	One CFDA (Catalog of Federal Domestic Assistance) number must be selected for performance measures with the usage type of Economic Recovery.
11	The edit checks were run on the following Performance Measures: #####, #####, #####, ...	<b>Informational Message</b>	Official and Internal Usage Types	Definition	List the Performance Measure number(s) the edit checks were run for.

## Tutorial Steps for Creating a Performance Measure

1. On the Performance Measure list screen, **Select the Add Button.**
2. Enter the measure **Title**.  
**Percentage of SCC residents participating in Phase 5 and Community Transition of the Treatment Program**
3. Select a **Usage Type** from the dropdown box.  
**Budget**
4. Select a **Frequency Type** from the dropdown box.  
**Quarterly**
5. Review **Lead Agency**, this selection defaults to your agency.  
**Retain your agency displayed by default.**
6. The required fields to create the measure have now been input; select Apply to continue entering data for the measure. (Note: selecting Save will direct you back to the performance measure list screen.)  
**Select the Apply button, the measure will show the system assigned Performance Measure Number.**
7. The Performance Measure information line now lists the measure: Number, Title, Status, and the user that currently has the measure In Use.  
**Review the information line listed above the navigation line for Go To Section:**
8. Start with the Definitions section of the measure detail.  
**Select the Definitions section from the options listed in the Go To Section:**
9. Select the measure type from the dropdown box.  
**Outcome**
10. **Enter the measure Description** in the text field.  
**Percentage of Special Commitment center residents participating in Phase 5 and 6 of the Treatment Program.**
11. **Enter the Operational Definition** in the text field.  
**This biennium SCC is reviewing the phase promotions quarterly. These numbers are based on the total number of residents in treatment.**
12. Next navigate to update the Uses section of the measure detail.  
**Select the Uses section from the options listed in the Go To Section:**
13. For this training exercise we will **set the Internal Usage type**. This will allow the measure to be tagged with agency Internal themes.  
**Under Usage Types, check the box for Internal, then select the Set/Unset Supported button.**
14. Next navigate to update the Tracking Data section of the measure detail.  
**Select the Tracking Data section from the options listed in the Go To Section:**
15. Select the **Unit Type** of the measure.

## Percent

16. Apply all changes made to the measure before updating the Tracking Periods and creating a biennium for the measures data.  
Select the **Apply** button.
17. Within the Tracking Periods create a biennium for the measures performance data. (note: Only those biennia that have been created will be listed in the biennium dropdown box.)  
Select the **Create Biennium** button, select the **Biennium** from the dropdown box, select the **Create** button.
18. Select all tracking periods to update Estimate and Target data for the performance data.  
Select the **top check box in the tracking periods grid**, all periods will display with a check mark, select the **Update** button.
19. On the Tracking Periods Amounts update screen, enter Estimate and Target data.  
**Enter for periods 1 Target of 7.4 and an Estimate of 8**  
**Enter for periods 8 Target of 7.6 and an Estimate of 8**  
Select the **Save** button to navigate back to the measure details.
20. Next navigate to update the Associations section of the measure detail.  
Select the **Associations** section from the options listed in the *Go To Section*:
21. Within the Supported Activities for the measures budget Activities can be selected for the measure. For Budget usage type measures a minimum of one activity must be associated to the measure.  
**Uncheck the Supported Only** check box, select the **Filter Data** button. **Verify the 2009-11 Biennium** is highlighted. **Check the box for the Activity**, select the **Set/Unset Supported** button.
22. Navigate back to the Performance Measure list screen.  
Select the **Save** button.
23. Locate the newly created performance measure on the Performance Measure list screen. Review the Edit Checks report for the measure.  
**Check the box for the measure**, select the **Edit Checks** button. **Review** messages then select **Close** button.
24. Create a new contact using the Agency Contact feature at the top of the screen.  
Select the **Agency Contacts** tab.
25. Enter a new agency contact that will be added to your new performance measure.  
Select the **Add** button. **Enter** the following: First Name (**Your First Name**), Last Name (**Smith**), Email Address (**[First name].Smith@agency.wa.gov**), Phone Number (**360-555-5555**). Select the **Save** button.
26. Create a new agency internal theme using the Theses feature at the top of the screen.  
Select the **Themes** tab.
27. Enter a new agency internal theme.  
Select the **Add** button. **Enter title (Your First Last Name)**, select the **Save** button.

28. Navigate back to the Performance Measure list screen to add the new Contact and Theme to your new measure.  
**Select the Performance Measure tab.**
29. Locate the newly created performance measure on the Performance Measure list screen to select for updates.  
**Check the box for the measure, select the Update button.**
30. Add the newly created contact to your measure.  
**Select the Additional Details section, Select the Add button under Contacts, select from the Contact dropdown your newly created agency contact, check the box for Subject Matter Expert, then the Save button.**
31. Add the newly created theme to you measure.  
**Select the Uses section. Uncheck the Supported Only check box, select the Filter Data button. Check the box for the Theme, check the Set/Unset Supported button. Select the Save button.**
32. Locate the newly created performance measure on the Performance Measure list screen to select for Submittal.  
**Check the box for the measure, select the Submit button. (Skip this step if not in training)**
33. The measure has been submitted for review, and is listed on the Performance Measure list screen with a status of Under Review.

## Results through Performance Management Reports

Reports are located in the Enterprise Reporting System. There are two ways to view RPM reports.

One way to access the reports is to select the short cut link **Enterprise Reporting** from within the application on the upper right corner of the screen. This will launch ER in a new browser.

The second way is to use the Enterprise Reporting (ER) link in a new browser. Enterprise Reporting Links:  
Within the state Intranet <http://reporting.ofm.wa.gov/businessobjects/enterprise10/eportfolio/en/logonform.csp>  
Outside the state Intranet <https://fortress.wa.gov/ofm/reporting/businessobjects/enterprise10/eportfolio/en/logonform.csp>

**Special Note for reports and the ‘Target’ vs. ‘Estimate’ data:** The performance measure tracking data for **Targets now is displayed instead of Estimates. Estimates do not display on the reports** listed but are maintained within the measure. For Target data to display on the reports, an entry must be made in the Targets field within the measure detail Tracking Data-Tracking Periods section.

Note: The RPM reports will not display any rich text formatting for the Relevance field.

Performance Measure Reports folder

### **RPM001 Performance Progress by Agency, Activity**

- This report provides information on performance measures as they relate to an agency and their activities.
- For measures in a hierarchy, only the top level measure will display. An ‘\*’ notes the data is calculated from one or more lower level measures.

### **RPM002 Performance Progress by Result Area, Strategy, Activity**

- This report provides information on Statewide Indicators and performance measures as they relate to Statewide Result Areas, Categories, and agency activities.
- For measures in a hierarchy, only the top level measure will display. An ‘\*’ notes the data is calculated from one or more lower level measures.

### **RPM004 Performance Progress by Agency**

- This report contains a quick view of all performance measures by agency. No version is required since the report lists measures as they relate to the agency. This report provides a quick view of an agencies performance measures.
- For measures in a hierarchy, a parameter selection on the schedule screen provides two options: only include the top level measure or include all measures in the hierarchy. A representation of the Hierarchy Tree is display within the report prior to the first measures details.

### **RPM008 Performance Measures and Activities Links**

- This report provides information to the user on which activities each performance measure is linked to in a particular budget period. It is used as a tool to help users identify where critical information may be missing for reporting and budgeting.
- The Unlinked items will display first on this report, followed on the next page with the Linked items.
- For measures in a hierarchy all measures in the hierarchy will display. A representation of the Hierarchy Tree is display within the report for the measures in a hierarchy.

Hands On

1. Log in to Enterprise Reporting.

2. Select the BASS Training folder. (**skip step if not in training class**)
3. Select the Performance Measure Reports folder.
4. Schedule the RPM001 report using the standard ER report creation steps. (**Use the Schedule with Selection Values.**)
5. The number of parameters will vary for each report.
6. Select **Budget Period** from the drop down arrow.
7. **Select Agency** from the drop down arrow.
8. **Select Status of Approved**, then select the **Add button**.
9. Click the **Schedule button** in the upper right hand corner to schedule the report.
10. Click the **instance time** to view the report (once *status* has changed to **Success**)

## Action Plans (an overview)

Provides the ability to manage and track the progress of actions, the steps or activities that will be performed for a strategy to succeed. The Action Plans section of RPM allows for the update and deletion of the plan for improved performance.



- The main Action Plans tab will list all action plans where you are the Lead Agency or a Partnership agency of the plan. Action Plans that have been established, can be managed from the Action Plans tab as well as, from within the associated performance measure details – Additional Details section.
- An action plan can be linked to one or many performance measures. An action plan cannot exist without an association (being linked) to a performance measure.
- Action plans can be linked to performance measures regardless of usage type.
- System provides the ability for an action plan created within one performance measure to be associated (linked) other performance measures.
- Action plans can only be Added (created) from within the performance measure detail, Additional Details section.
- Action Plan changes are not tied to workflow, changes to the action plan will be displayed in all status instances of the performance measure. The action plan does not have a workflow status, only the performance measure(s) it is linked to will have a workflow status.

## Add (Create) a new Action Plan

The only location to create a new action plan is from within the performance measure detail, Additional Details section (on the 'Go to Section' navigation bar, select the 'Additional Details' button.) Choose the 'Add' button to create a new action plan for the performance measure. From here you can also Manage and Update the action plan.

## Action Plan main tab

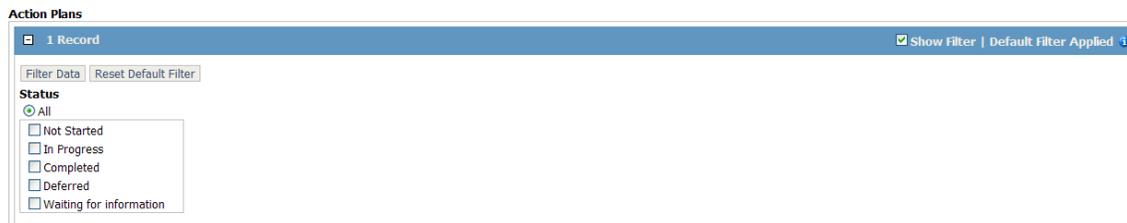


## Show Search

## Action Plan search by Usage Type

- **Usage Type** (how the action plan will be used: Budget, Economic Recovery, GMAP, Internal)

When **changing any of the search** criteria, **select the criteria then the LOAD DATA button to finalize** the selections.



## Show Filter

Action Plan filter by Status

- **Status** (action plan status: Not Started, In Progress, Completed, Deferred, Waiting for information)

When **changing any of the filter** criteria, **select the checkbox(s) then the FILTER DATA button to finalize** your selections.

## Action Plan Action buttons



At the bottom of the page is a list of action plans based on the search and filter criteria selected. Above this list of action plans is a row of Selection/Action buttons:

1. **Update** – Perform a variety of operations on one or more action plans. By selecting the checkbox(s) for a performance measure then the Update button.
2. **Open History Log** – select the checkbox for an action plan, then the Open History Log button to view the historical actions related to the action plan.
3. **Delete** - Only action plans with one usage type and your agency is the lead for the action plan can be deleted.
  - If the action plan is linked to more than one performance measure, a message will be displayed listing all performance measures.
4. **Clear Sort** – Removes any column sort order and its ascending/descending options in the action plan grid.
5. **Reset Default Sort** – Selection will reset the default column sort options to Lead Agency Ascending, and then based on the lead agency the measure number ascending.
  - The number or measures displayed can be selected at the bottom on the screen. Options are 10, 20, 30 or All measures on a page.
  - Note: The more items selected to display on the page will result in a slower response time loading the Performance Measure list screen.

## Action Plan grid columns

Locked	Lead Agency	Partnerships	Number	Title	Due Date	Status	Budget	Economic Recovery	GMAP	Internal	Person Responsible
<input type="checkbox"/>	477		000131	Process Improvements		Not Started	✓				Smith, Jay

1 | (Page 1 of 1) | Rows Per Page 10

6. **Locked** – an icon that indicates if the action plan is locked. Action plans linked to a locked measure will be locked and cannot be updated. OFM Operations can perform a lock and unlock of the performance measure.
7. **Lead Agency** – Lead agency of action plan.
8. **Partnerships** – Contributing agencies to the action plan.
9. **Number** – Action plan number.
10. **Title** – Action plan title.
11. **Due Date** – Action plan completion date.
12. **Status** – Current status of action plan.
13. **Budget** – Check mark indicates usage type indicator for action plan.
14. **Economic Recovery** – Check mark indicates usage type indicator for action plan.
15. **GMAP** – Check mark indicates usage type indicator for action plan.
16. **Internal** – Check mark indicates usage type indicator for action plan.
17. **Person Responsible** – Individual responsible seeking a resolution to the action plan.

# Action Plan Manage screen

**Results through Performance Management**

Enterprise Reporting  
Contact  
Help  
Log Out

Performance Measures | Action Plans | Scenarios | Agency Contacts | Themes | Settings

Action Plans > Manage Action Plan

Apply | Save | Reset | Open History Log | Delete | Cancel

**Action Plan: 000131 - Process Improvements**

**Number**  
000131

**Title**  
Process Improvements

**Description**  
This will decrease the .....

**Purpose**

**Start Date**  
Clear

**Due Date**  
Clear

**Status**  
Not Started

**Status Date**  
8/10/2010

**Status Comment**

**Associated Performance Measures**  
1 Record

Lead Agency#1	Partnerships Number#2	Title
477	001508	Pheasant hunter participation

**Agencies**  
1 Record

Filter Data | Reset Default Filter

Lead and Partnership Agencies Only

Lead#1	Partnership#2	Code#3	Title
<input type="checkbox"/>	<input checked="" type="checkbox"/>	477	Department of Fish and Wildlife

**Usage Types**  
1 Record

Set/Unset Supported | Clear Sort | Reset Default Sort

Supported#1	Title#2	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Budget

**Contacts**  
1 Record

Filter Data | Reset Default Filter

Assigned Contacts Only

Set Person Responsible | Set/Unset Secondary Contact | Clear Sort | Reset Default Sort

Person Responsible#1	Secondary Contact#2	Agency#3	First Name#4	Last Name#4	Phone Number	Email Address	Active
<input type="checkbox"/>	<input checked="" type="checkbox"/>	477	Jay	Smith	(555) 555-5555 ext. j.s@ofm.wa.gov		<input checked="" type="checkbox"/>

Action buttons:

18. **Apply** – records the action plan changes and you will remain on the *current* screen.
19. **Save** – records the action plan changes and returns you to the *previous* screen.
20. **Reset** – resets any changes made and you will remain on the *current* screen.
21. **Open History Log** – Navigates to the history log of action plan changes.

Following actions will be recorded for the action plan:

- a. When the action plan is created
- b. When the sections of the action plan are updated:
  - i. Action Plan Title

- ii. Responsible Individual Name
- iii. Action Plan Agency
- iv. Action Plan Description
- v. Action Plan Purpose
- vi. Action Plan Status
- vii. Action Plan Status Comment
- viii. Action Plan Partnership Agency
- ix. Action Plan Due Date

22. **Delete** – Delete the current record.

23. **Cancel** – Cancels any changes made to the action plan and returns to the *previous* screen.

Action Plan detail fields:

24. **Number** – Action Plan number, system generated and read-only.

25. **Title** – Action plan title explains ‘What you plan to do’ to resolve the issue, 100 characters.

26. **Description** – A statement or narrative describing the action plan. Any details or further description about the task. 8000 characters.

27. **Purpose** – A statement or narrative describing why you are doing the action plan, what you hope to achieve. Why you are doing the task, what you hope to archive. 8000 characters.

28. **Start Date** – the date the action plan will be started by.

29. **Due Date** - the date the action plan is expected to be completed by.

30. **Status** – the current status of the task. Required to add and save an action plan.

31. **Status Date** - is derived based on the last update of the action plan.

32. **Status Comment** – Comments on the current status of the action plan task to be updated for future forums.

33. **Associated Performance Measures** – the linked performance measure(s) that will give context to the action plan. Performance measures that contribute or affect the action plan.

The following fields will be displayed:

- a) Lead Agency of the performance measure
- b) Partnership of the performance measure
- c) Number of the performance measure
- d) Title of the performance measure

34. **Agencies**

- a) Lead or Partnership – the agency that is the lead for completing the task. The lead agency for the action plan. Partnership agency is any other agencies that are contributing to the task. The lead agency for the action plan can be different than the lead agency for the performance measure. For Official Usage types once a lead agency has been added to the action plan it can only be updated by OFM Operations.
- b) Partnership agency are any additional agencies that are contributing to the task and helping to resolve the action plan.

- A 'Yes' will display in the column for lead or partnership for the agencies related the action plan. The agency code and title will display for reference.
  - The Action Plan Agency or Action Plan Partnership Agency identified in the action plan must be either the Lead or Partnership Agency in at least one of the measures associated with it.
  - All agencies associated to the performance measure are not required to share the action plan.
35. **Usage Type** – usage type of action plan can be different from performance measure. Select one or more usage types. The usage types provided are based on the usage types that exist within the linked performance measures. Internal Usage types can be removed from the action plan. Official Usage types once added to the action plan can only be removed by OFM Operations.
36. **Contacts** – based on the Agency contacts list, first last name, agency of contact, email, phone, and active flag.
- a) **Person Responsible** – the name of the individual who is responsible for ensuring it is done. Required to add and save an action plan.
  - b) **Secondary Contact** – secondary contact for action plan.
    - All Performance Measure contacts for performance measures associated with the action plan will be notified by e-mail when the action plan status been updated
    - When Action Plan status updates: the following will be notified via e-mail: OFM User assignment table, OFM BASS mail box, Agency user who submitted PM's, OFM budget operations PM analyst, and GMAP assigned Analyst
    - The primary agency will be used to send an email based on the analyst assignment table.
    - For Action Plan status updates: Internal usage type only measure will notify agency contacts. OFM and GMAP will not receive e-mail notifications for Agency Internal PM's

## Tutorial Steps to Add a new (create) Action Plan

1. The only location to create a new action plan is from within the performance measure details,
2. From the **Performance Measure List screen**, select the **performance measure** that an action plan will be created for (must be a status of Draft or Returned), then the update button.
3. On the '**Go to Section**' navigation bar, select the '**Additional Details**' button.
4. At the bottom of this section is the **Action Plans grid**, Select the '**Add**' button to create a new action plan for the performance measure. You will be navigated to the Mange Action Plan screen.
  - a. At a minimum an action plan should include: 1) a specific task of what will be done, 2) by whom and 3) by when.
  - b. The **required fields to save** a newly added action plan are: Title, Usage Type, and Person Responsible.
  - c. The Usage Type selected is to identify the business process the action plan supports.
5. On an apply or save the Action Plan number will be created.
6. **Enter a Title** that describes the action plan. This field is required to save the action plan.
7. **Enter a Description** of the steps or action of the plan.
8. **Enter the Purpose** of the action plan, what the plan will achieve.
9. **Select the Start Date** for the Action plan. **Select the calendar icon** to select a Month/Day/Year.
10. **Select the Due Date** for the Action plan. **Select the calendar icon** to select a Month/Day/Year.
11. **Select a Status** for the action plan.
12. **Status Date** a system generated date based on the last update to the action plan.

13. **Enter a Status Comment**, to explain the current status of the action plan.
14. **Associated Performance Measures**, by default the performance measure the action plan was created for will be displayed. If there are other action plans that are linked to the action plan, they will also be displayed.
15. **Agencies** grid, by default your agency is listed as the Lead agency. Only those agencies that are a lead or partnership of the performance measures linked to the action plan will display.
16. **Select a Usage Type** for the performance measure, then **select the Set/Unset Supported button**. Only those usage types that are listed for the linked performance measure(s) are listed. One usage type is required to save the action plan.
17. **Select a Contact**, then **select Set Person Responsible button**. A Person Responsible is required to save the measure. If additional persons should be added, select the individual then the 'Set/Unset Secondary Contact' button to add them to the action plan. *NOTE: Only agency contacts that have been added to the master list on the Agency Contacts tab will be available for selection.*
18. **Select the Save button**, to save action plan changes and navigate back to the performance measure details. Select the Apply button to save action plan changes and remain on the action plan details screen. In addition, the newly created action plan will be listed on the main Action Plan tab.

## Tutorial Step for Updating an Action Plan

1. There are two locations to update action plans:
  - a. **From any of the performance measures** that are linked to the action plan. On the ‘Additional Details’ section ‘Action Plan’ grid you can Update the action plan.
  - b. **From the main Action Plan tab**, all action plans where your agency is the Lead Agency or Partnership Agency will be listed.
2. **Select the action plan**, from either location, then the **Update button**.
3. **Make the needed updates**, then the **Save button**.

## Create a Hierarchy (a Mathematical link of performance measures)

A hierarchy in the RPM system is a mathematical link 'parent-child' relationship between performance measures. This system feature will allow for the more detailed entry of performance data (at a program, region, or office level) and the ability to aggregate and display the performance data at an agency/statewide roll-up level.

A hierarchy can have only one top level parent (top level roll-up), but it will provide for the ability to have mid-tier roll-up levels. The lowest level measures, where tracking data is entered, can roll-up to mid-tier levels; those mid-tier roll-up levels can roll-up to the top (parent) level total for all linked performance measures.

### ***Hierarchy Inherited and Non-Inherited data elements***

The parent performance measure inherits the following information from the associated (linked) child measures: Tracking Amount actual, and based on a user selection targets and estimates.

The **child performance measures inherit** the following, the selections and text, **from the top level parent measure:**

- **Measure Type** – located on the Definition section of the measures detail.
  - **Description** – located on the Definition section of the measures detail.
  - **Operational Definition** – located on the Definition section of the measures detail.
  - **Relevance** – located on the Definition section of the measures detail.
  - **Usage Type** – located on the Uses section of the measures detail.
  - **Unit Type** – located on the Tracking Data section of the measures detail.
  - **Unit Label** – located on the Tracing Data section of the measures detail.
  - **Frequency** – located on the Tracking Data section of the measures detail.
  - **Precision** – located on the Tracking Data section of the measures detail.
  - **Direction of Success**– located on the Tracking Data section of the measures detail.
  - **Target Range** – located on the Tracking Data section of the measures detail.
    - **Target selection** – located on the Tracking Data section of the measures detail.
  - **Ratio or non-Ratio selection** – located on the Tracking Data section of the measures detail.
    - **Ratio numerator title** – located on the Tracking Data section of the measures detail.
    - **Ratio denominator title** – located on the Tracking Data section of the measures detail.
- All inherited attribute values for a hierarchy will be updated in a single location, the top level parent and be read-only in the children.
- **Once a hierarchy exists, the following fields cannot be updated anywhere in the hierarchy** (from the Tracking Data section of the measure): Target Range/Non-Range, Ratio/Non-Ratio, Precision, and Frequency.

**For each performance measure in the hierarchy the following are non-inherited fields and can be modified at the child level:**

- **Measure Title** – located on the Definition section of the measures detail.
- **Contact** – located on the Additional Details section of the measures detail.
- **Summary analysis** – located on the Additional Details section of the measures detail.
- **Focusing Question** – located on the Definition section of the measures detail.
- **Geographic locations** – located on the Additional Details section of the measures detail.
- **User defined field** – located on the Additional Details section of the measures detail.

- **Detailed Analysis** – located on the Additional Details section of the measures detail.
- **Notes (unpublished)** – located on the Additional Details section of the measures detail.
- **System data pulled from field** – located on the Tracking Data section of the measures detail.
- **Date data current as of field** – located on the Tracking Data section of the measures detail.
- **Tracking comment** – located on the Tracking Data section of the measures detail.
- **Estimate, Actual, Targets** – located on the Tracking Data section of the measures detail.
- **Tracking Biennium** – located on the Tracking Data section of the measures detail.
- **Program** – located on the Associations section of the measures detail.
- **Subprogram** – located on the Associations section of the measures detail.
- **Attachments and hyperlink sections** – located on the Attachments section of the measures detail.
- **Status** – for the instance the measures status.
- **Lead Agency** – located on the Associations section of the measures detail.
- **Partnership Agencies** – located on the Associations section of the measures detail.
- **Activities** – located on the Association section of the measures detail.
- **Related Performance Measures** – located on the Associations section of the measures detail.
- **Themes** – located on the Uses section of the measure detail.
- **CFDA** – located on the Uses section of the measures detail.

## **Hierarchy Business Rules**

### **Hierarchy measure status:**

1. Any measure in the hierarchy with a status of Approved will be read-only. Select the 'Copy to Draft' button on the Performance Measure List screen or on the Hierarchy Tree view screen to create a Draft status instance of the measure(s).
2. Where more than one status exists for a performance measure, the measure displayed will be based on the **Preferred Performance Measure Status selection** on the **Settings Tab**.

### **Hierarchy Tracking Data:**

3. Tracking comments can be entered at any level in the hierarchy.
4. Parent measures in a hierarchy will inherit all of the tracking biennia of the child measures.
5. Only the lead agency of the top-level performance measure in a hierarchy can update the hierarchy attributes: Roll-up or Not Roll-up estimates and targets, hierarchy type (sum, average).
6. The tracking data field Actuals are always summed, but the Targets and Estimates can be summed or averaged based on the Hierarchy Type selection.

### **Partnership agencies:**

7. A parent measure in the hierarchy must contain all children measure agencies (if a child contains an agency it must also exist in the parent measure.) Each performance measure in the hierarchy can have a different lead or partnership responsibilities.
8. An agency must be associated to the parent before it can be added to a child measure. Any additional measures containing agencies not in the parent, must be added to the parent prior to adding the child measure.
9. An agency must be removed from the child measure before it can be removed from the parent measure.

### **Linking Child Measures to a Top Level Parent Measure:**

10. Children cannot be added until its agency and usage types have been aligned with the parent. All agency(s) and all usage type(s) in the child must exist in the parent.
11. A measure cannot add children if tracking amounts exist in proposed parent. The user must delete the tracking amounts prior to adding children.
12. When linking measures in a hierarchy establish a link from parent to child, not child to parent.
13. To create a hierarchy a user must have Agency Operations security and must be lead or partner of the top-level measure in the hierarchy.
14. Note: when selecting an existing measure the following message will display: 'Making the selected performance measure children in this hierarchy will change the following fields to match the parent: Description, Operational Definition, Relevance, Unit Label, Ratio Number Title, Ratio Denominator Title.' And include both an OK and Cancel button.

### **Email:**

15. When adding or removing a child from the hierarchy, where the child or parent is an official measure, a notice will be sent to all contacts, including GMAP, Budget Analysts, Agency Contacts, of the parent and child.

### **Unlinking:**

16. The parent of the hierarchy must be selected to unlink any child measures.
17. Inherited and non-inherited values will remain for the child when it is unlinked from the parent.
18. A child must be unlinked from a parent before linking to a different parent.

19. An approved measure in a hierarchy cannot be deleted until the measure is unlinked from the hierarchy.
20. A measure cannot be inactivated until the measure is unlinked from the hierarchy.
21. A user must belong to the lead or partner agency of a parent and lead agency of the potential child to create, link or unlink a hierarchy performance measure.
22. A hierarchy cannot be linked or unlinked if either measure is "in use".
23. When a child measure with no children is unlinked from a hierarchy it will become a standalone measure.
24. When a parent measure with linked child measure(s) is unlinked from a hierarchy, the parent and all linked child measure(s) will become stand alone measures.
25. A user must unlink a measure from the hierarchy to change its frequency.

**Usage type:**

26. A usage type cannot be removed from a parent performance measure if a theme for the usage type exists anywhere in the hierarchy. Note: Themes are established by usage types.
27. A usage type added to the parent will be inherited by all measures in the hierarchy. When the measure(s) in the hierarchy are selected to be submitted the measures status will become Under Review, and will need OFM approval.

**Performance Measures available for selection (inclusion in the hierarchy):**

28. Measures that are included in another hierarchy are not listed in the measures available for selection to link to the hierarchy.
29. A child candidate must be visible to the current user. The parent must have an agency that exists in the child.
30. For a measure to qualify as a child, it must match the following tracking data attributes of the potential parent: Unit Type, Target Range or Target selection, Ratio or non-Ratio selection, Precision, desired direction, frequency.  
If the potential child is the parent of a hierarchy, the hierarchy attributes (roll up targets and estimates, hierarchy type) must match the potential parent.

## Manage Hierarchy screen

Enterprise Reporting  
Contact  
Help  
Log Out

Results through Performance Management

Performance Measures | Action Plans | Scenarios | Agency Contacts | Themes | Settings

Performance Measures > Manage Hierarchy

Apply | Save | Reset | Update Hierarchy | Add New Measure as Child | Hierarchy Tree | Cancel

Performance Measure: 002105 - Top Parent of Hierarchy | In Use By: Sara2 Corbin

Load Data | Reset Default Search

**Usage Type**  
 All  
 Budget  
 Economic Recovery  
 GMAP  
 Internal

**Theme**  
 All  
 Budget - Janice testing Mag Themes  
 Economic Recovery - Theme for model testing  
 GMAP - Inactive theme  
 GMAP - KK Manage\_Hier\_Del\_Child  
 GMAP - Theme for PM uses testing

**Active**  
 All  
 Yes  
 No

**Program**  
 All  
 010 - Board Program  
 020 - Administrative Services Program  
 040 - Liquor Purchasing & Distribution Program  
 050 - Regulatory Services Program  
 060 - Enforcement Program  
 070 - Information Technology Services Program  
 850 - Nonbudgeted Funds Program

**Hierarchy Type**  
 Average

Rollup Estimates and Targets

**Performance Measures**

6 Records

Set/Unset Child | Clear Sort | Reset Default Sort

Parent	Child	Has Children	Lead Agency	Partnerships Number	Title
<input type="checkbox"/>			195	002107	Child 2 of Hierarchy
<input type="checkbox"/>	<input checked="" type="checkbox"/>		195	002106	Child 1 of hierarchy
<input type="checkbox"/>			195	000683	Businesses in compliance with tobacco laws
<input type="checkbox"/>			195	000681	Businesses in compliance with liquor laws
<input type="checkbox"/>			195	000044	Cases Shipped
<input type="checkbox"/>			195	000037	LCB Distributed Revenue

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To start: **Select the performance measure from the Performance Measure List screen.** Check the box of the measure, **then select the Manage Hierarchy button.**

Note: The measure selected cannot contain tracking data (applies to both the Approved and Draft/Review instances).

### Manage Hierarchy Action Buttons:

- Apply** – records the changes and you will remain on the *current* screen.
- Save** – records the changes and returns you to the *previous* screen.
- Reset** – returns to the default screen settings.
- Update Hierarchy** – displays the hierarchy attribute selections: Hierarchy Type and Rollup Estimates and Targets options.
- Add New Measure as child** – provides the ability to create a new measure that will become a child measure of the current measure in the hierarchy.
- Hierarchy Tree** – displays an outline view of measures in the hierarchy.
- Cancel** – changes are not executed and you will be navigated back to the performance measure list screen.

### Manage Hierarchy Search Options:

- Load Data** – When **changing any of the search criteria select the criteria then select the LOAD DATA button to finalize** the selections.
- Reset Default Search** – the Reset Default Search button selects All Usage Types, All Themes, Only Active measures, and All Programs.

**Hierarchy Type** – read-only, displays rollup selection of sum or average. Modifiable by using the Update Hierarchy button.

**Rollup Estimates and Targets** – Read-only, a Check in the box indicates a yes to rollup. Modifiable by using the Update Hierarchy button.

**Performance Measures** grid – a list of available measures that can be selected to be included in the hierarchy.

Buttons:

- **Set/Unset Child** – ability to define a parent child relationship within a Performance Measure. Provide the ability to unlink a child from a parent.
- **Clear Sort** – clear any sort selections in the grid.
- **Reset Default Sort** – resets default sort order of grid.

Columns:

- h) **Parent** – A checkmark identifies whether a measure belongs to an existing hierarchy as a parent level measure.
- i) **Child** – A checkmark identifies whether a measure belongs to an existing hierarchy as a child level measure.
- j) **Has Children** – A checkmark identifies whether the current measure has children in the hierarchy.
- k) **Lead Agency** – the lead agency of the performance measure.
- l) **Partnerships** – partnership agencies of the measure.
- m) **Number** – performance measure number.
- n) **Title** – performance measure title.

## Steps to create a Hierarchy

1. On the Performance Measure List screen, **Add a new measure.**
2. **Check the box on the line of the new measure**, then select the **Manage Hierarchy button.**
3. **A message will appear;** ‘This action caused a new hierarchy to be created. The following fields will not be updateable: Target Range or Target Selection, Ratio or Non-Ratio Selection, Precision, and Frequency. Are you sure you want to continue?’ **Select the OK button.**
4. **Select the Hierarchy Type**, A Summary hierarchy type means that data at the parent measure level will be the sum of the children measures; an Average hierarchy type means that data at the parent measure level will be the average of the children measures
  - Options are Summary or Average
  - When a hierarchy type Average is selected, the calculation for each period will be a straight average of all child elements which have a non-null amount. Parent amounts will not be used in the calculation.
5. **Retain default checkmark for Rollup Estimates and Targets**, or uncheck.
  - **Checked** identifies whether the Estimates and Targets at the Parent level will be a sum total of the child measure Estimates and Targets. **Target and estimate values are read-only at the parent.**
  - **Unchecked** identifies then the **Estimates and Targets values may be edited at all level in the hierarchy.**
6. **Select the Save button.**
7. The hierarchy attributes are now established, the Manage Hierarchy screen is now displayed. On this screen, performance measures available to be linked to the hierarchy are displayed. Note: a measure must now be selected and set as a child to complete the establishment of the hierarchy.
8. **Select the checkbox of the measure**, to be set as a child in the hierarchy, then select the **Set/Unset Child button.**
9. **A message will appear;** ‘Making the selected performance measures children in the hierarchy will change the following fields to match the parent: Description, Operational Definition, Relevance, Unit Label, Ratio Numerator Title, Ratio Denominator Title.’ This is stating if the measure being selected to be a child in the hierarchy has values for any of the listed fields, they will be overwritten to display the values of the parent for the listed fields. **Select the OK button.**
10. **Select the Save button.**
11. To continue building the hierarchy. Select an existing performance measure check box then the Set/Unset Child button, or select the ‘Add New Measure as a Child’ button.

Note: Actuals are always rolled up for each selection. Only the lowest level of the hierarchy will allow for entering data for actuals.

Note: Updates to the Tracking Data in the child performance measures will be reflected in the rollup totals of the parent for all items in the hierarchy based on the Settings tab selection for Preferred Performance Measure Status. For example, if a child measure has an Approved instance and a Draft instance, the Selection from the Settings tab will determine which tracking number is used to display the parent total.

## Hierarchy Tree view

The Hierarchy Tree displays all performance measures of the hierarchy in an outline view. Tree view provides the ability to view the parent (higher level) to a measure in the hierarchy.

For the following walkthrough, please refer to the screen capture above.

### **Example of Parent and Child measure links for a hierarchy**

When draft tracking data is read-only, a linked lower level child measure exits for tracking data entry.

**The top measure is the parent of the hierarchy.** This measure will display the total of all child measures tracking data for Actuals, Targets, Estimates. This hierarchies attributes are marked Yes, roll-up Targets and Estimates.

- Item #1 (read-only tracking fields)
  - ❖ Item #1 displays the sum of tracking data from Items #2, #3, and #8.

**Performance measures listed indented once are children of the parent.**

- Item #2 (updateable tracking data fields)
- Item #3 (read-only tracking fields) – measure has linked child measures.
- Item #8 (updateable tracking data fields)

**Performance measures listed indented twice are child measure(s) of the performance measure listed directly above.** An expand '+' or collapse '-' symbol will display for the parent.

- Items #4 (read-only tracking fields), Item #6 (updateable tracking fields), Item # 7 (updateable tracking fields) are children of parent Item #3.

Performance measures that are child measures with linked lower level child measures.

- Item #4 (read-only tracking fields) is a child of item #3
  - ❖ Measure Item #3 displays the sum of tracking data from Item #4
- Item #5 (updateable tracking fields) is a child of item #4
  - ❖ Measure Item #4 displays the sum of tracking data from Item #5

## Explanation of the Hierarchy Tree

The current item (performance measure) will be highlighted upon entry into the page. For example, performance measure number 001774 (item #4) above is highlighted blue based on selecting the measure on the performance measure list screen and then the Hierarchy Tree button.

The performance measures are listed by number and title, and the measure status is displayed in parenthesis.

- Note: Where more than one status exists for a performance measure, the measure displayed will be based on the **Preferred Performance Measure Status selection** on the **Settings Tab**.

Expand the '+' or Collapse the '-' to view the issues. The child measures are displayed when you expand the parent measure by selecting the "+".

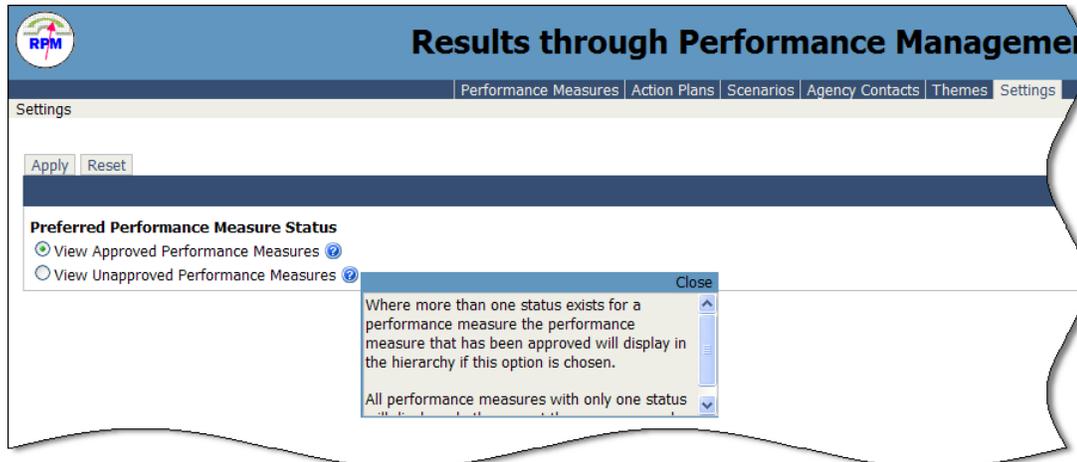
Each item has a checkbox to select an action button:

- a) **Manage** – for the selected measure (that does not contain tracking data) you will be navigated to the Manage Hierarchy screen to set/unset child measures for the selected performance measure.
- b) **Update** – Select one or many measures to update the measure details.
- c) **Tracking** – Select one or many measures to update tracking data and comments.
  - Measures where tracking data is read-only in the hierarchy will display grayed out.
  - The update of Comments is provided for all measures.
  - Note: If multiple measures have been selected, a 'Save on Navigation' option is by default marked Yes (checked). This will save all updates, prior to navigating to the next measure. Uncheck selection box to select the Save or Apply button after changes.
- d) **Copy to Draft** – Select one or many measures to create a modifiable working copy of an approved measure. Measures with a status of Draft or Returned can be updated.
- e) **Edit Checks** – Select one or many measures to run the edit checks, displays a report listing any critical and warning message for the selected measures.
- f) **Submit** – Select one or many measures to submit for approval.
- g) **Import** – used to select the excel file for the import of tracking data.
- h) **Export** – select one or many measures to export tracking data to an excel worksheet.
- i) **Open History Log** – select a measure to view modification history for the measure.
- j) **Select All** – places a checkmark selection for all measures.
- k) **Deselect All** – removes all checkmark selection for all measures.
- l) **Expand All** – expand all lower level measures in the hierarchy that are not currently being displayed.
- m) **Collapse All** – collapse all lower level measures in the hierarchy that are currently being displayed.

A *lock symbol* will be displayed to the left of the checkbox for measures that have an OFM Operational Lock placed on them. The draft copy of the measure can be updated, but not submitted when the Lock icon displays for the measure.

## Settings tab (for view of measure data in a Hierarchy or Scenario)

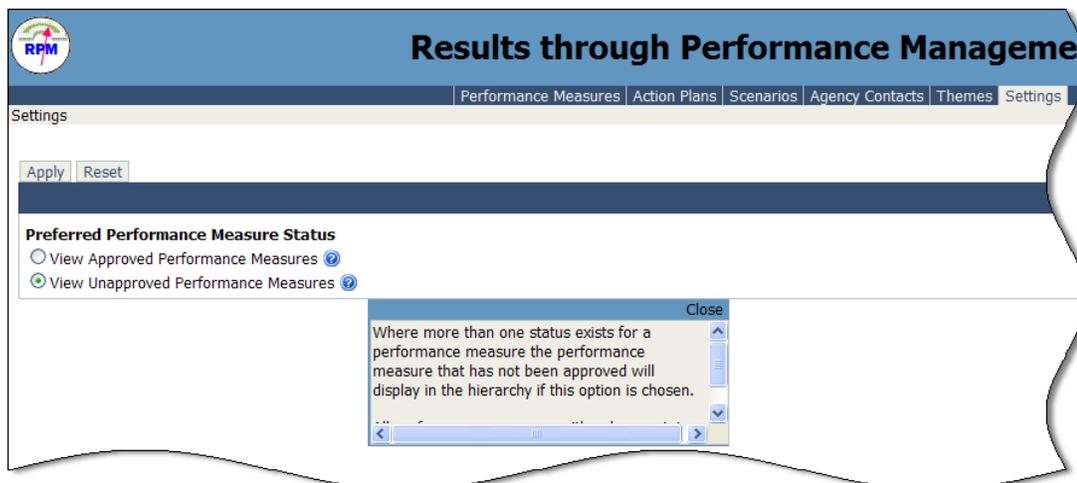
The settings tab provides the ability to select the preferred performance measure status for measures that are part of a hierarchy or a scenario. Where more than one status exists for a performance measure the settings tab will provide for a selection of View Approved measure(s) or View Unapproved measure(s) when managing a hierarchy or scenario.



### Tool Tip for View Approved Performance Measure Status states:

Where more than one status exists for a performance measure the performance measure that has been approved will display in the hierarchy if this option is chosen.

All performance measures with only one status will display whether or not they are approved.



### Tool Tip for View Unapproved Performance Measure Status states:

Where more than one status exists for a performance measure the performance measure that has not been approved will display in the hierarchy if this option is chosen.

All performance measures with only one status will display whether or not they are approved.

## Scenario (an overview)

The Scenario feature of the RPM system provides the ability to group related performance measures by Topics, Subtopics, and to each other to create a drilldown relationship. Additionally this feature provides the ability to creating linkages between performance measure to define correlations and connections. Linked measures do not have a mathematical roll-up of tracking data, but rather provide a means to group measures in like categories.

Note: Measure data elements are not derived and tracking data is not summed or averaged for linked measures in a scenario.

### ***Business Rules for Scenarios***

1. For an Agency user to add a measure to a scenario they must be the lead agency or partner agency of the measure.
2. When both an approved and a working status instance of a performance measure exists, the measure displayed in the scenario will be based on the **Preferred Performance Measure Status** selection on the **Settings Tab**.
3. When grouping measures by topics and subtopic, the measure data is not modified.
4. Provides the ability to select a measure at any level of a hierarchy to include in the scenario and does not require the parent to be included.
5. Provides the ability to add official and internal measures to a scenario.
6. Once an Official Usage Type has been added to a scenario, it cannot be removed by any Agency user, an OFM Operations user must remove the official usage type.
7. A performance measure can be included in many scenarios.
8. A scenario can have none to many topics (topics and subtopics are specific to a scenario).
9. When deleting a topic, all contents below the selected level will be deleted from the scenario instance (a warning message is displayed for conformation.)
10. A topic can have none to many subtopics. (topics and subtopics are specific to a scenario.)
11. A subtopic is associated to the scenario topic it has been created for.
12. When deleting a subtopic, all contents below the selected level will be deleted from the scenario instance (a warning message is displayed for conformation.)
13. Provides the ability to assign and modify a list order for topics and subtopics

Note: When deleting performance Measures on PM List Screen:

A performance measure cannot be deleted if it is associated with a scenario. A report will display a listing of scenarios that the performance measure is associated with.

## Scenario Tab

Enterprise Reporting  
Contact  
Help  
Log Out

Results through Performance Management

Performance Measures | Action Plans | Scenarios | Agency Contacts | Themes | Settings

Scenarios Jay Smith : 477 - Department of Fish and Wildlife

Show Search | Default Search Applied

Load Data | Reset Default Search

Usage Type

All

Budget

Economic Recovery

GMAP

Internal

Scenarios

1 Record Show Filter | Default Filter Applied

Filter Data | Reset Default Filter

Owner Editable

All  All

Smith, Jay  Yes  No

Add | Update | Scenario Tree | Copy | Open History Log | Delete | Clear Sort | Reset Default Sort

Owner	Agency	Participating Agencies	Number	Title	Budget	Economic Recovery	GMAP	Internal	Editable	Has Drilldown
Smith, Jay	477		00058	Fish program					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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### Show Search

- **Usage Type** (how the scenarios will be used)

### Show Filter

- **Owner** – (lists the name of the owner of the scenario)
- **Editable** – (filter option to identify scenarios that are editable 'Yes', are viewable but not editable 'No', or 'All' lists all scenarios editable and viewable)

When a Search for All Usage Type, Filter for All Owner and All Editable have been selected the following list of Scenarios will be displayed on the scenario tab:

- Scenarios where you are the owner of the scenario
  - Scenarios that are marked "Viewable in My Group" and "Viewable outside My Group"
  - Scenarios that are marked "Editable in My Group" and "Editable outside My Group"
1. If the 'Outside My Group Access' is either Read-only or Editable, then any agency that has a measure in the scenario can see the scenario. This applies to all other agencies (outside of your agency) that have access to RPM. If your agency is listed as the Owner of the scenario, the 'Outside My Group Access' does not relate to you or other members of your agency. The agency of the scenario owner will look at the 'Inside My Group Access' permissions to determine access for other members of your agency.
  2. Scenarios designated by the Owner as private, "Private in My Group" and "Private outside My Group", are not viewable by any other system users.
  3. For Agency Operations and Agency Edit user: If a scenario can be viewed by the system user, measures in the scenario where the user's agency is not that lead or partnership agency will be read-only.
  4. For OFM Operations and OFM Analyst user: If a scenario can be viewed by the system user, measures in the scenario that are Internal usage type only will be read-only

## Action Buttons

1. **Add** – Used to create a new scenario where you are the owner.
2. **Update** – Used to update an existing scenarios that is editable to you.
3. **Scenario Tree** – Used to navigate to the scenario tree view for the selected scenario.
  - The Scenario Tree view provides the ability for users to view in an outline form the scenarios measures within topic and subtopic.
  - The Scenario Tree view provides an ability to expand or collapse the topics and subtopics to view their related measures.
4. **Copy** – Provides the ability to make a copy of an existing scenario that is viewable or editable to you.
  - All contents will be copied to the new scenario
  - A new title of ‘Copy of Scenario Number[scenario number of original]’ is assigned
  - A new scenario number is assigned
  - A new create date will be added to the copy
  - The owner name of the user who copied the scenario will be assigned to the copy
  - The system will assign a creation date to the scenario (the date the copy was made)
  - The scenario copy will receive a system assigned unique scenario number
  - The system will default for the scenario access rights designation on a copy as ‘Private Inside My Group Access’ and ‘Private Outside My Group Access’
5. **Open History Log** – Select the scenario then the button to review a history of changes.
6. **Delete** – Delete the selected scenario, confirm the warning message to complete deletion.
  - Scenarios can be deleted by: the scenario owner, OFM operations for official usage type, Agency Operations for Internal usage type.
  - You must have edit rights to the scenario to perform a delete.
  - The system will provide prompts/warning messages to the user when a scenario is selected to be deleted (when the button is selected)
7. **Clear Sort** – clears the sort selections on the scenario grid.
8. **Reset Default** – restores the default sort order Scenario Number descending on the scenario grid.

## Scenarios Grid Columns

1. **Owner** – Name of scenario owner, the individual who created the scenario.
2. **Owner Agency** – The agency associated with the owner.
3. **Participating Agencies** – All agencies listed as a lead or partnership for the measures included in the scenario.
4. **Number** – The system assigned scenario number.
5. **Title** – The scenario title.
6. **Usage type columns:** a checkmark indicates the usage type Budget, Economic Recovery, GMAP, Internal.
7. **Editable** – A checkmark indicated your ability to edit the scenario
8. **Has Drilldown** – A checkmark indicates if the scenario contains topics, subtopics, measures.

## Scenario Details

Note: The owner of the scenario and any user with edit access to the scenario can update the scenario detail fields.

Consistent with other areas of the RPM system:

- To commit a selection in a grid, check the box for the item and select the action button or set/unset supported button, after making changes on the screen select the Apply button to save changes and remain on the screen (the Save button will save changes and return to the previous screen)

1. **After selecting the Add** (or Update for existing scenarios) button under the Scenario section **on the Scenario Tab**, you will be navigated to the Manage Scenario screen where the following fields will be displayed.

The **Manage Scenario screen** provides the ability to create/manage the scenario title and attributes, and create/manage related topic.

Enterprise Reporting  
Contact  
Help  
Log Out

Performance Measures | Action Plans | Scenarios | Agency Contacts | Themes | Settings

Scenarios > Manage Scenario Jay Smith : 477 - Department of Fish and Wildlife

Apply | Save | Reset | Scenario Tree | Open History Log | Delete | Cancel

Scenario: 00058 - Fish program

**Number**  
00058

**Title**  
Fish program

**Inside My Group Access**  
Private

**Outside My Group Access**  
Private

**Owner**  
Jay Smith

**Agencies**  
1 Record

Owner	Participating	Code	Title
<input type="checkbox"/>	<input checked="" type="checkbox"/>	477	Department of Fish and Wildlife

**Usage Types**  
4 Records

Supported	Title
<input checked="" type="checkbox"/>	Internal
<input type="checkbox"/>	Budget
<input type="checkbox"/>	Economic Recovery
<input type="checkbox"/>	GMAP

**Topics**  
1 Record

List Order	Title	Has Drilldown
1	Hatcheries	<input checked="" type="checkbox"/>

2. **Number** – Scenario number assigned by the system on the save/apply button selection.
3. **Title** – A title is required to save a scenario.
  - a. Scenario titles do not have to be unique
  - b. Maximum of 100 characters
4. **Inside My Group Access** – Private, Read-Only, Editable. Defines the security rights to the scenario for other users in your agency with RPM security access.
5. **Outside My Group Access** – Private, Read-Only, Editable. Defines the security rights to the scenario for other users outside your agency with RPM security access.
6. **Owner** – Lists the name of the owner of the scenario.

7. **Agencies** – Read-only display. A checkmark will display under the Owner column for the agency of the scenario owner. A checkmark will display under the Participating column for all agencies listed as lead or partnership for the measures included in the scenario
8. **Usage Type** – A usage type is required to save a scenario. One or many usage types can be included for the scenario. Identifies the business process the scenario supports.
  - The usage type of the scenario can be different from that of the performance measures included in the scenario. Performance measures with any usage type can be included in the scenario. Once an Official Usage Type has been added to a scenario, it cannot be removed by any Agency user, an OFM Operations user must remove the official usage type.
9. **Topics** – A scenario can have none to many topics. Performance Measures can be linked and/or Subtopic created for a selected topic.

Action buttons for Topics section:

- a. **Add** – Create topics for the scenario.
- b. **Update** – Update the details for a selected topic. Update the topic title, add/update subtopics for the selected scenario, and link performance measures to the topic.
- c. **Reorder** – Reorders the topics for a preview of the new order. This is only a preview. You must Apply or Save to finalize the changes. The display of topics and subtopics within a scenario will be based on their list order.
- d. **Delete** – Delete the selected Topic and all linked subtopic and performance measures from the scenario. Note: measures are not deleted from the system, but rather removed from the scenario.
- e. **Reset** – Reset grid sort order.
- f. **Clear Sort** – Clear the current list order.
- g. **Reset Default Sort** – Resets the system default sort order.

**NOTE: To continue the scenario features and fields walk through and navigate to the Manage Topics screen, the following steps were completed on the Manage Scenario screen to create and save the scenario:**

**Entry of a Scenario Title, Selection of a Usage Type, Selection of the Apply Button, then under the Topic section Selection of the Add button.**

On the **Manage Topic screen** the ability to create related subtopic and link performance measures to the topic is available.

1. **List Order** – List order will be unique at each level in the scenario. System assigned on the save/apply button selection, but can be reordered on the Manage Scenario screen.
2. **Title** – A title is required to save a topic.

- a. topic titles do not have to be unique
  - b. Maximum of 100 characters
3. **Subtopics** – section to create and manage subtopics for the current topic.

Action buttons for Subtopics section:

- a. **Add** – Create subtopics for the current topic. Selection provides the ability to Add the topic title and link performance measures to the subtopic.
  - b. **Update** – Update the details for a selected subtopic. Selection provides the ability to update the topic title and link performance measures to the subtopic.
  - c. **Reorder** – Reorders the subtopics for a preview of the new order. This is only a preview. You must Apply or Save to finalize the changes. The display of topics and subtopics within a scenario will be based on their list order.
  - d. **Delete** – Delete the selected subtopic and all linked performance measures from the scenario. Note: measures are not deleted from the system, but rather removed from the scenario.
  - e. **Reset** – Reset grid list order.
  - f. **Clear Sort** – Clear the current sort order.
  - g. **Reset Default Sort** – Resets the system default sort order.
4. **Performance Measures** – section to link existing performance measures for the selected topic.

Action buttons for Performance Measure section:

- a. **Manage** – to link or remove performance measures from the scenario.
  - On the selection of the Manage button you will navigate to the Manage Performance Measures Drilldowns screen.
  - Based on the Search and Filter criteria, measures where your agency is the lead or partner are displayed for selection.
  - Check the measure then the Set/Unset Drilldowns button to include a measure in the scenario.
- b. **Update** – to link or remove a drilldown measure(s) to the selected performance measure.
- c. **Update Performance Measures** – for the selected performance measure(s) you will be navigated to the performance measures details screen for view and update. After updates have been completed selecting the Save button will navigate you back to the scenario. Note: only measures in draft or returned status can be updated. Approved and pending measures will be read-only.
- d. **Reorder** – Reorders the performance measures for a preview of the new order. This is only a preview. You must Apply or Save to finalize the changes. The display of performance measures within a scenario will be based on their list order.
- e. **Remove** – Remove the selected performance measures from the scenario.
- f. **Reset** – Reset grid list order.
- g. **Clear Sort** – Clear the current sort order.
- h. **Reset Default Sort** – Resets the system default sort order.

**NOTE: To continue the scenario features and fields walk through and navigate to the Manage Subtopics screen, the following steps were completed on the Manage Topic screen to create and save the scenario's topic:**

**Entry of the Topic title, Selection of the Apply Button, then under the Subtopics section Selection of the Add button.**

On the **Manage Subtopic** screen the ability to link performance measures to the subtopic is available.

1. **List Order** – List order will be unique at each level in the scenario. System assigned on the save/apply button selection, but can be reordered on the Manage Topics screen.
2. **Title** – A title is required to save a subtopic.
  - a. Subtopic titles do not have to be unique
  - b. Maximum of 100 characters
3. **Performance Measures** – section to link existing performance measures for the selected subtopic.

Action buttons for Performance Measure section:

- a. **Manage** – to link or remove performance measures from the scenario.
  - On the selection of the Manage button you will navigate to the Manage Performance Measures Drilldowns screen.
  - Based on the Search and Filter criteria, measures where your agency is the lead or partner are displayed for selection.
  - Check the measure then the Set/Unset Drilldowns button to include a measure in the scenario.
- b. **Update** – to link or remove a drilldown measure(s) to the selected performance measure.
- c. **Update Performance Measures** – for the selected performance measure(s) you will be navigated to the performance measures details screen for view and update. After updates have been completed selecting the Save button will navigate you back to the scenario. Note: only measures in draft or returned status can be updated. Approved and pending measures will be read-only.
- d. **Reorder** – Reorders the performance measures for a preview of the new order. This is only a preview. You must Apply or Save to finalize the changes. The display of performance measures within a scenario will be based on their list order.
- e. **Remove** – Remove the selected performance measures from the scenario.
- f. **Reset** – Reset grid list order.
- g. **Clear Sort** – Clear the current sort order.
- h. **Reset Default Sort** – Resets the system default sort order.

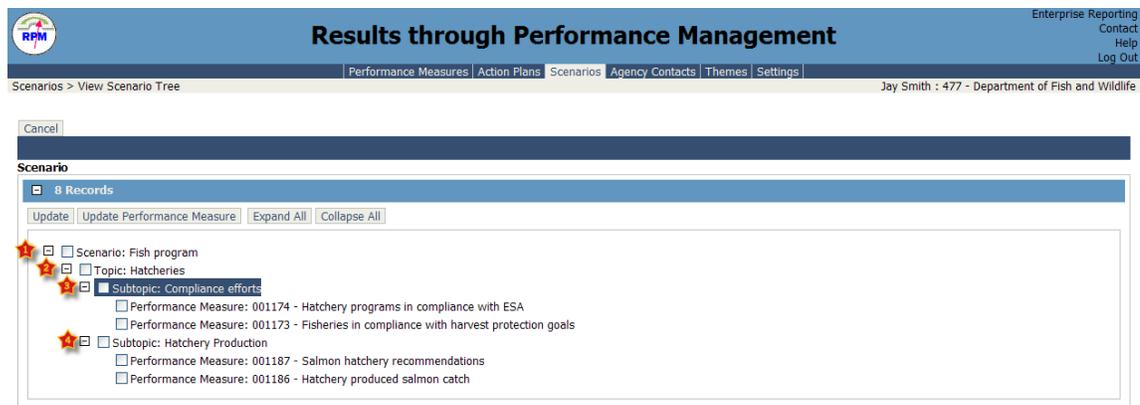
## Step to Create a Scenario

1. On the **Scenario Tab**, under the Scenario section **Select the Add button**.
2. The number for the new Scenario will be assigned on the save/apply.
3. **Enter a title for the Scenario** that is descriptive. Required to save the scenario.
4. **Select an option for Inside My Group Access**. The setting determines for those with RPM security in your agency if the scenario is not viewable (Private), can view (Read-Only), or is editable (Editable).
5. **Select an option for Outside My Group Access**. The setting determines for those with RPM security not in your agency if the scenario is not viewable (Private), can view (Read-Only), or is editable (Editable).
6. The system will assign your name as the Owner of the scenario.
7. Under the Agencies section, your agency number will appear checked as the owner.
8. **Select one or more Usage Types**, for the business process that the scenario is supporting, **then the Set/Unset Supported button**. Required to save the scenario.
9. **Select the Apply button** to commit the changes and create the scenario.
10. **Under the Topics section select the Add button**.
11. List order will be assigned by the system, use the Reorder button on the Manage Scenario screen to change topic list order.
12. **Enter a title for the Topic** that is descriptive (required to save the topic), then **select the Apply button**.
13. To create a lower level grouping for the current Topic, **Select the Add button under the Subtopics section**. Performance measures can be linked to the subtopic by selecting the Manage button on the Manage Subtopic screen.

### **OR**

To link Performance Measure to the current Topic grouping, **Select the Manage Button under the Performance Measure section**.

# Scenario Tree view



Item #1 is the **Scenario title**: Fish Program

Item #2 is the **Topic title**: Hatcheries

The topic has two subtopics;

Item #3 is a **Subtopic title**: Compliance efforts

There are two measures in the subtopic.

Item #4 is a **Subtopic title**: Hatchery production

There are two measures in the subtopic.

The current item (topic, subtopic, or performance measure) will be highlighted upon entry into the page. The highlighted scenario item viewed prior to selecting the Scenario Tree button.

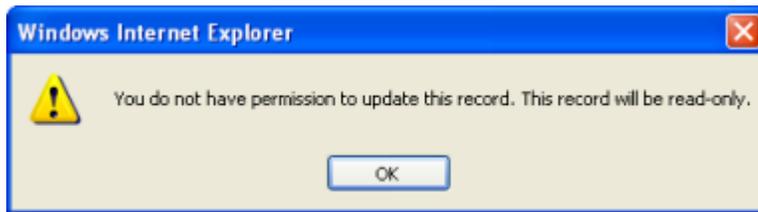
The performance measures are listed by number and title.

- Note: Where more than one status exists for a performance measure, the measure displayed will be based on the **Preferred Performance Measure Status selection** on the **Settings Tab**.
- If a measure has an OFM Operations Lock applied, the draft measure is updateable but cannot be submitted.
- The scenario screen will not display the measure status (based on the Settings tab selection) or the OFM Operations Lock icon.

Expand the '+' or Collapse the '-' to view the issues. The child measures are displayed when you expand the parent measure by selecting the "+".

Each item has a checkbox to select an action button:

1. **Update** – Select one Scenario item (scenario title, topic, subtopic, or performance measure) to update the scenario item details.
  2. **Update Performance Measure** – Select one performance measure to update the measure details.
- Note: If the measure selected is in a status of Approved or Under Review the following message is displayed.



- Note: Where more than one status exists for a performance measure the performance measure listed is based on the Settings Tab – Preferred Performance Measure Status. Verify your setting selection if the Status of the measure is not as you expect.
- 3. **Expand All** – Expand all lower level items in the scenario that are not currently being displayed.
- 4. **Collapse All** – Collapse all lower level items in the scenario that are currently being displayed.

## Release Notes Section

1. The application will insert a space after the ampersand when it is followed by the pound symbol and will not happen when the pound symbol is listed before the ampersand (#&). (Ex: &# will produce & #)
2. When the Internet Explorer option of Text Size Largest is used some fields will not display its full contents and will display as truncated.
3. Fortress users may not be able to view attachments. The project team has documented the issue and will work to a resolution. If you experience this, please call the Budget Portfolio helpline at (360) 725-5278.
4. Issues Log: an error message will be displayed if the control function 'Paste' is enabled. Cut and Paste functionality is not supported within the Attachment File field of the issues log.
5. Rich text feature for Insert Data Table, Column sizing option to set the cell properties:
  - a. Click inside the cell of the column
  - b. Click the table button
  - c. Click on the edit cell properties selection
  - d. Set the properties of the cell using the dialog box
  - e. Click 'OK'
6. On the Issues Log, when an issue or response has been added and saved, use the '+' to expand issue if needed.
7. On the Manage Scenario screen, when an official usage type has been selected to be unset from the scenario (in the Usage Types grid) you can exit the page using the Reset or Cancel button, or by selecting the Scenarios screen from the breadcrumb bar (select OK on warning message.)
  - Note: Once an Official Usage Type has been added to a scenario, it cannot be removed by any Agency user, an OFM Operations user must remove the official usage type.