Performance Tracking Power BI Dashboard

Project Management Plan



**Document Information**

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**Distribution of Final Document**

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1. **PURPOSE:**

The purpose of this project is to design and implement a Power BI dashboard for tracking employee and departmental performance. It aims to enable real-time monitoring, performance alerts, and data-driven decision-making through visual insights.

* Enhance managerial decision-making with timely and accurate insights.
* Identify high performers and underperformers for reward, recognition, or intervention.
* Promote transparency and accountability across departments.

# Business Objectives:

# To develop a multilayered Power BI dashboard for comprehensive employee performance tracking.

# To enable employee-wise performance tracking to assess individual contributions and improvements.

# To implement department-wise tracking for evaluating team-level efficiency and productivity.

# To provide admin-level access for managing user permissions and securing sensitive performance data (by using premium)

# To incorporate automated alerts for underperformance to ensure timely interventions and support. (by using premium)

# Providing a visual representation of underperformance across departments and individual employees for actionable insights.

# In-scope:

* Development of Power BI dashboards for performance tracking.
* Department-wise performance analytics.
* Employee-level KPI and target tracking logic.
* Identification and visualization of over and under-performance.

## Out-scope:

* Real-time integration with HRMS or payroll systems.
* Mobile application development
* Direct performance improvement actions or HR interventions.
* External benchmarking or industry comparison dashboards.
* Custom visualization components not supported by Power BI.
* Any services not discussed during requirement elicitation meetings is by default considered as out-scope.

**5. Deliverables from the Project Team:**

* Power BI Dashboard – Employee Performance Overview
* Visual KPIs for attendance, goal completion, appraisal scores, etc.
* Drill-down by employee, team, department, time-period.
* Department-wise Performance Analysis
* Cross-comparison of departments.
* Aggregated and visual summaries with trends.
* Individual Employee Performance Tracking
* Scorecards, trend lines, and rating summaries.
* Performance Alerts & Thresholds
* Conditional alerts for over/underperformance.
* Customizable KPIs and thresholds.
* Role-Based Access Control
* Admin-level and manager-level access setup.
* Data visibility according to user roles.
* Scheduled data refresh and maintenance guidelines.
* Feedback and Iteration Loop
* Reviews, modifications, and final approval.

1. **Functional Requirements:**

* **Employee Logic and kpi /Targets calculation**- Based on the KPI provided by the client the daily performance of the employee will be tracked
* Login and logout timings-Tracks employee attendance duration by capturing daily login and logout timestamps for productivity analysis (to be asked)
* **Department wise**-Enables comparative performance analysis across different departments to identify strengths and inefficiencies.
* **Activity Monitoring**-Logs and evaluates employee tasks or actions throughout the day to assess engagement and workload distribution.
* **Under performance calculation**-Detects and highlights employees or departments falling below defined KPI thresholds for timely intervention.

# Technical Requirements:

# Power BI (Pro version): Used for dashboard development and visualization.

# Access to Karma App: Via API or data export for retrieving employee performance data.

# AWS Access: For data storage and processing, if required.

# DWH/Excel/Google Sheets Access: Alternative data sources for integration into Power BI.

# Data Requirements:

# Employee Profile Data: Employee ID, Name, Department, Job Role, Hire Date, Manager Name/ID.

# KPI/Targets: KPI data, Daily/Weekly/Monthly assigned to departments and employees

# Department Wise: Dept code, Name, Department head, Manager Name/ID.

# Peer Recognition Data: Recognition ID, Sender, Receiver, Date, Category, Comments, Points/Value.

# Feedback Scores: Feedback ID, Employee, Reviewer, Date, Score, Category, Comments.

# Goal Progress Data: Goal ID, Employee, Description, Start/End Date, Status, Completion Percentage.

# Engagement Metrics: Login Frequency, App Usage Time, Participation Rate.

# Historical Performance Data: Past performance records for trend analysis.

# Success Metrics:

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| **Metric** | Description |
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# 10. Compliance and data privacy:

# Compliance and data privacy focus on keeping employee performance data safe.

* **Ensure all data handling complies with relevant regulations:** These are laws that say how you must handle personal data (like employee names or feedback). The project must follow these rules to avoid breaking the law.
* **Implement role-based access control in Power BI to secure sensitive data**: Only authorized people (like HR or managers) can see certain data. This is like giving only the teacher the key to the classroom, not every student.
* **Use encrypted data transfers and secure storage to protect employee information**: Data moving from the Karma app to Power BI (or stored on AWS) is protected with encryption, like a secret code, so hackers can’t steal it
* **The areas, functionalities, mentioned in this Out-of-Scope section are intentionally excluded from the scope of this research**. Any assumptions, analysis, recommendations, or decisions made beyond the project boundaries are not the responsibility of the project team. Specifically, this document does not cover integration with third party HR or payroll systems, real-time performance tracking automation, or any functionalities beyond the current version. The scope is limited to employee performance visualization using available historical data, and excludes any predictive analytics, employee feedback mechanisms, or decision-making support for promotions or terminations.

# 11. Risk management and contingency plan:

# The risk management and contingency plan identifies potential problems with building the

# dashboards and outlines how to handle them. Here are the risks and plans:

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| **Risk** | **Our Contingency plan** |
| Inaccurate or incomplete data from Karma app | Check the data with the client before using it in Power BI. Use a data cleansing process to fix errors, like removing duplicates |
| Low user adoption due to dashboard complexity | Design simple dashboards with clear labels and tooltips. Provide training videos or guides to teach users how to navigate them. |
| Data privacy breaches | Use strict access controls (only HR sees sensitive data), conduct security checks, and encrypt data to keep it safe |
| System Downtime | Implement automated fail over mechanisms and real-time servermonitoring to minimize disruptions and ensure continuous Demand forecasting model operations |
| Data Integrity Issues | Establish regular data backups with rollback plans for critical events, ensuring no loss of data. |
| Scope Creep | Define project boundaries clearly, with formal approval processes for any additional enhancements beyond the agreed scope. |

# Scalability and expansion plan:

* **To facilitate region-wise performance tracking to identify geographic trends and discrepancies**
* **Integration with Karma app for attendance (login/logout) and activity monitoring.**
* **Design Power BI data models to handle increasing data volumes**:

The dashboards are built to work smoothly even if the company adds more employees or collects more data (e.g., more feedback or recognitions)

* **Plan for future features:**

The project plans for adding new things later, like new performance metrics (e.g., customer satisfaction scores) or connecting to other HR tools.

* **Accommodate organizational growth:**

The dashboards can support more departments or users as the company expands, without needing a complete rebuild.

1. **Service Level Agreement (SLA) & Support**

# Technical Support (Remote): Continuous monitoring and support to ensure system uptime and optimal performance (depending on uninterrupted power supply, internet and live feed/footage).

# Response Time: Critical issues will be addressed within a few hours of reporting.

# Bug Fixes & Patch Releases: Regular quarterly updates to enhance security, improve

# system performance, and introduce new features as needed.

# Server Maintenance & Monitoring: Monthly performance checks, real-time cloud server monitoring, and proactive issue resolution to prevent downtime.

# Post-Implementation Support: Comprehensive training sessions for the staff to ensure smooth adoption and system operation.

# Stakeholders:

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| **Stakeholder** | **Responsibility/Benefit** |
| Project Sponsor/Client | Approves scope, budget, and outcomes; expects timely delivery and performance insights |
| Data Analysts / BI Team | Validate KPI logic and ensure accuracy of visualizations |
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