Regional KPI Dashboard
- Standard User Guide
- Audience: non-technical users
- Updated: 2026-02-10

1. What this system is for

- The Regional KPI Dashboard shows key performance information for your region.
- You can view KPI metrics, charts, and case studies, and apply date and region filters.

2. Sign in

- Open the dashboard link provided by your organisation.
- Enter your Email Address and Password.
- Select Login.
- If you forgot your password, enter your email first and click Forgot password?
- This sends a reset request to an admin who will issue a temporary password.

3. First login after a reset

- If you were given a temporary password, you will be asked to change it.
- Enter Temporary Password, New Password, and Confirm New Password.
- Click Update Password to continue.

4. Choosing your screen

- Use the left sidebar View Mode selector.
- Most users will see: KPI Dashboard and Case Studies.
- Admins also see: Admin Dashboard.

5. Using KPI Dashboard

- The KPI Dashboard opens with your current region and time settings.
- Use Region Filter in the sidebar. Admin, Manager, and RPL users can choose All Regions.
- Use Time Filters to switch between All Time, Year, Quarter, Month, Week, or Custom Range.
- Custom Range must be 3 months or less.

6. KPI tabs explained

- Governance: steering group and volunteer activity.
- Partnerships: organisation and partner coverage.
- Delivery: walks delivered, participation, and demographics.
- Income: funds raised, grants/payments, and trend chart.
- Comms: outreach and communication metrics.
- Case Studies tab: read case studies filtered by your selected dates and region.

7. Using Case Studies screen

- Open Case Studies from View Mode.
- Read existing entries sorted by date.
- To add one: open Upload New Case Study, complete Title, Story/Testimonial, Date, and Region,
  then click Submit Case Study.
- Both Title and Story are required.

8. Last data refresh

- A Last Data Refresh card appears in the sidebar after login.
- Green means data was refreshed recently.
- Amber means refresh is older.
- Red means refresh is overdue or unknown.

9. Logging out

- Use the Logout button in the sidebar when you finish.

10. Common issues

- User not found: check the email spelling and ask an admin to confirm your account.
- Invalid password: retry carefully; passwords are case-sensitive.
- No data for selected filters: widen date range or switch region.
- Cannot reset password: confirm you entered your email before pressing Forgot password?.

11. Admin-only features (for awareness)

- Only Admin users can access Admin Dashboard functions such as user management,
- Beacon sync/upload, and audit logs.
- If you need one of these actions, contact an admin.