CFAO KENYA LTD

ONLINE PMS

PMS V3. Change GUIDE

Table of Contents

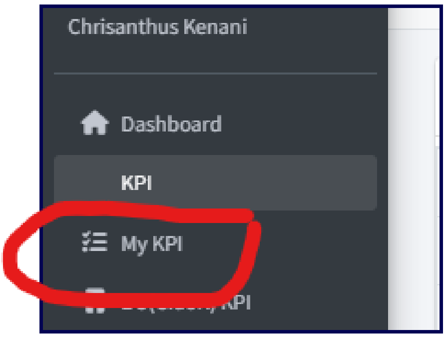
Change list

1. Look and Feel
   i. A simpler approach to basic tasks with a consistent view
   ii. A hierarchal view of things
       Enable team leaders view the tree down
   iii. Results preview
       Help track preliminary results based on formulae and matrix fed
   iv. Responsive
       Enhanced responsiveness and content wrapping on smaller screens and handheld devices
   v. Assessment
       Methodology of answering questions now on scale range
   vi. Administration & Management
       Ease is in system administration and team/level management
   vii. Navigation
       Using breadcrumb menu, it's now easy to navigate to parent menu
2. Security Upgrade
   i. Account Management
       User account locks after three unsuccessful login attempts
   ii. Security patches
3. Help page
   Submit PMS related help/change requests through the portal
4. PMS Email Address
   User will only receive PMS emails and Notifications from only
   Cfao PMS cpms@cfao.com
   Emails from **pms_notifier@ck-pms.com** are henceforth retired

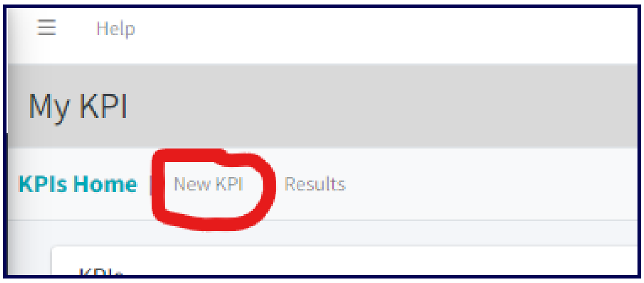
KPI

How to submit a KPI

1. Click on **My KPI** Link on left navigation panel



2. On the page **My KPI** click on **New KPI**



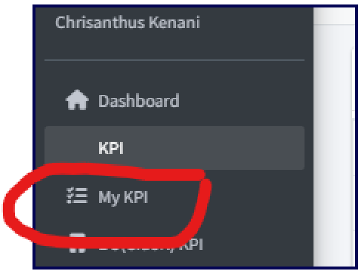
3. Populate all the relevant fields and submit

NB:

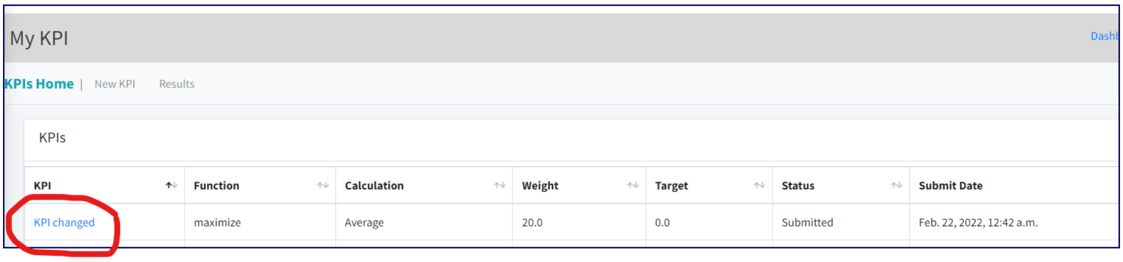
-	KPI submission has timelines set by HR
-	One can only submit a certain minimum and maximum number of KPIs, as set by HR
-	Sum of KPI weights should add up to 100

How to edit a KPI

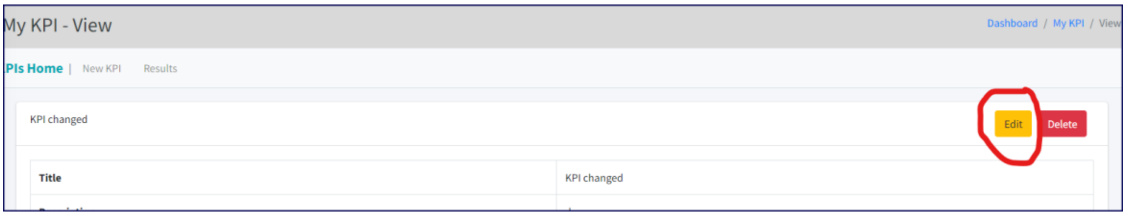
1. Click on **My KPI** Link on left navigation panel



2. On **My KPI,** page click on the KPI you wish to Edit



3. Click on the Edit Button on the top right of the **KPI Page**



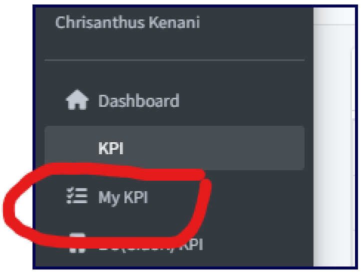
4. Make the corrections and Submit

NB:

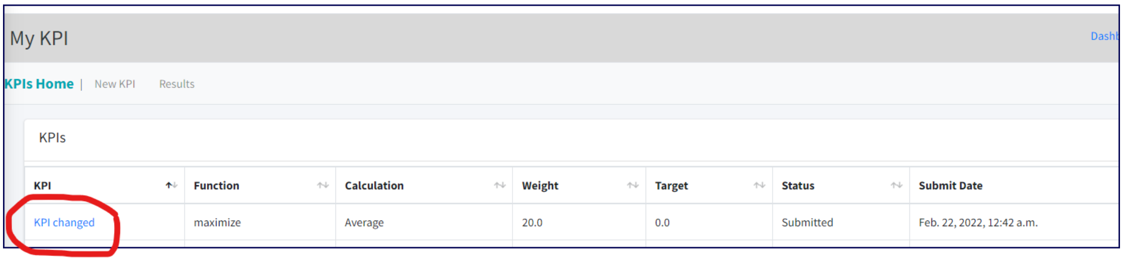
- One can edit KPI after submission deadline
- One can only edit a KPI in "Submitted" or "Edit" status. Approved KPIs cannot be edited
- Sum of KPI weights should add up to 100

How to delete a KPI

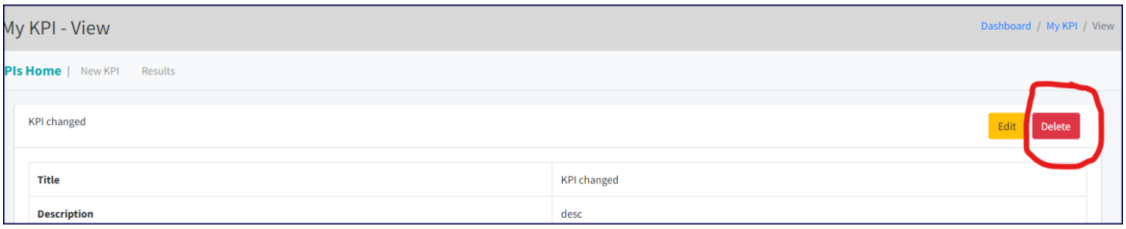
1. Click on **My KPI** Link on left navigation panel



2. On **My KPI,** page click on the KPI you wish to Delete



3. Click on the Delete Button on the top right of the **KPI Page**



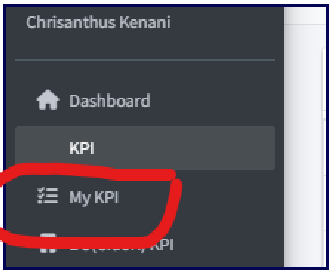
4. Confirm KPI Deletion

NB:

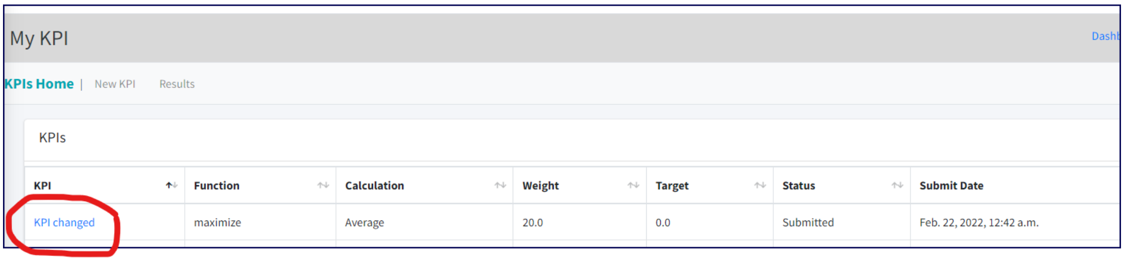
- One can delete KPI after submission deadline.
- One can only delete a KPI in “Submitted” or “Edit” status. Approved KPIs cannot be edited

How to submit KPI Results

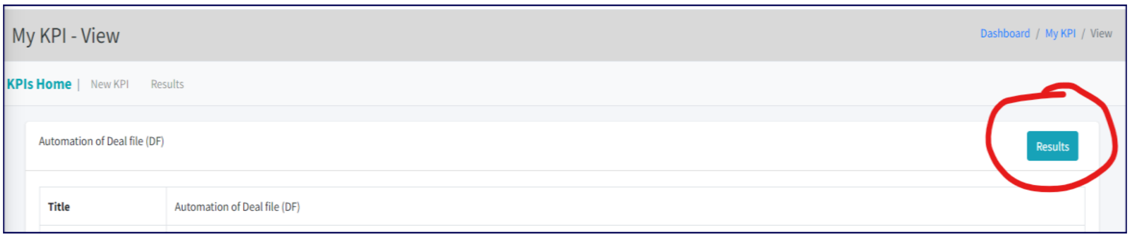
1. Click on **My KPI** Link on left navigation panel



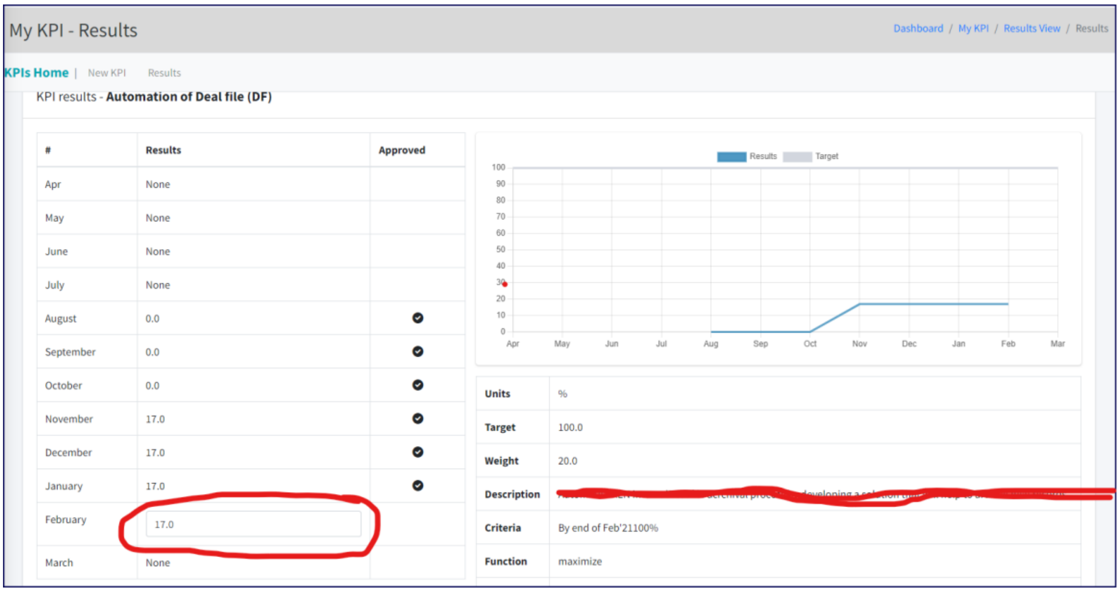
2. On **My KPI,** page click on the KPI you wish to Edit



3. Click on the Results Button on the top right of the **KPI Page**

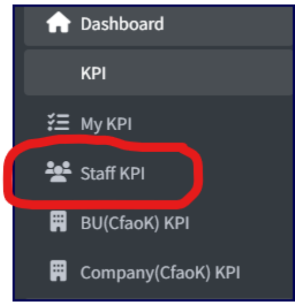


4. Input/Edit the monthly KPI results you wish and submit

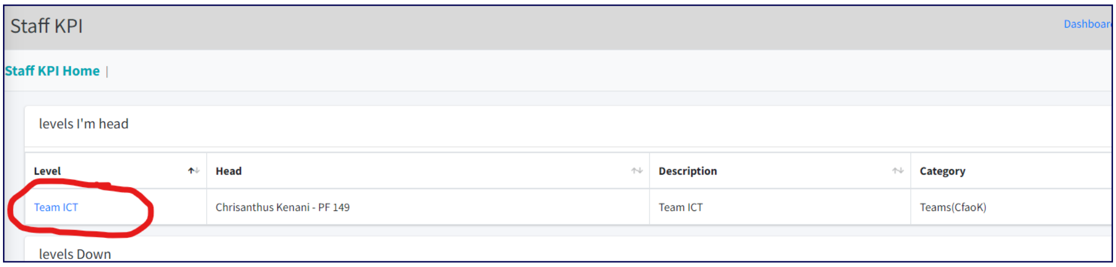


How to approve KPI results

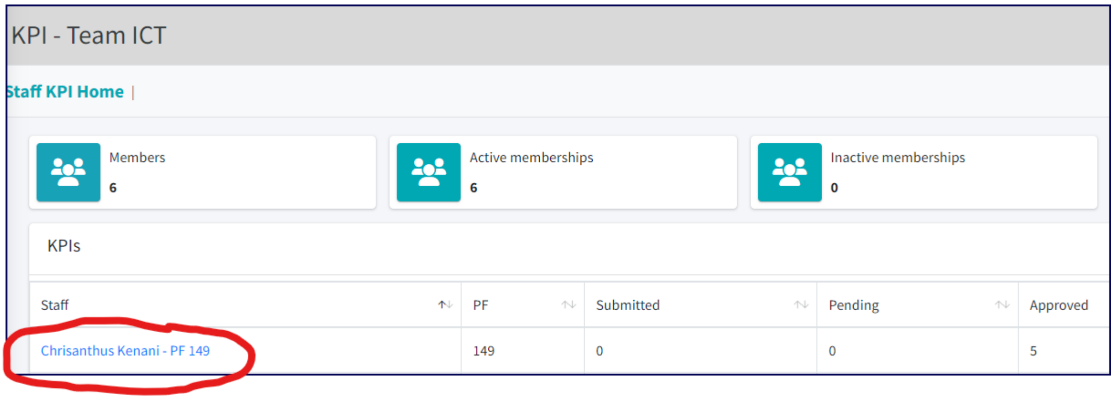
1. Click on **Staff KPI** Link on left navigation panel



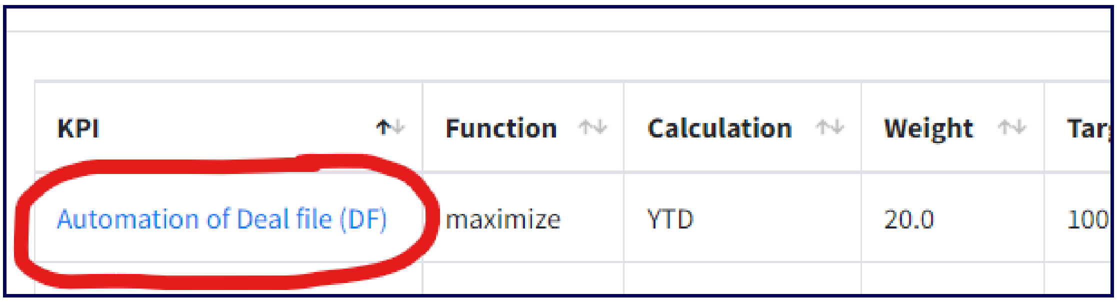
2. Click to select the team you head



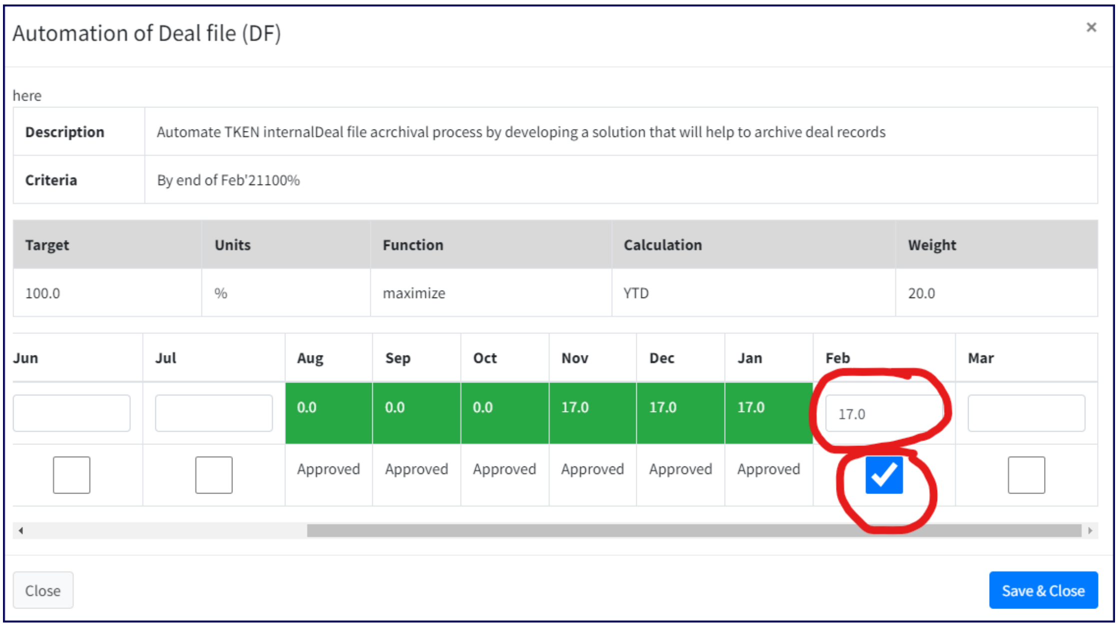
3. Click to select a specific team member



4. Click to select the specific KPIs



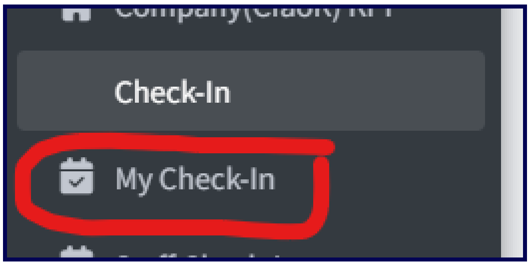
5. Edit Specific KPI result (if need be) and check the approved checkbox below



Check-In

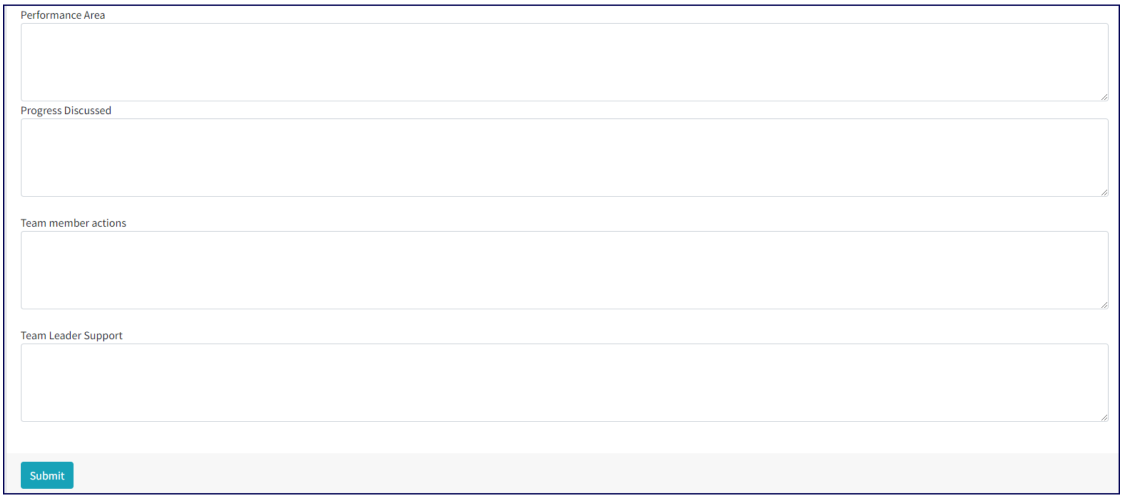
How to submit a Check-In

1. Click on **My Check-In** Link on left navigation panel



2. On **My Check-In** Page click on "**Submit Month Check-In(New)**"

3. Fill the fields requested and submit

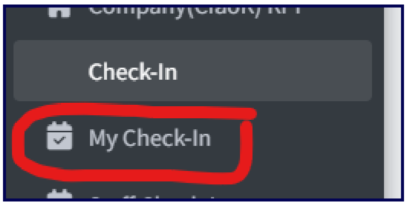


NB:

-	One cannot Submit a monthly Check-In after HR set submission deadlines.
-	One can only delete/edit a Check-In in "Submitted" or "Pending" status. Approved Check-Ins cannot be edited

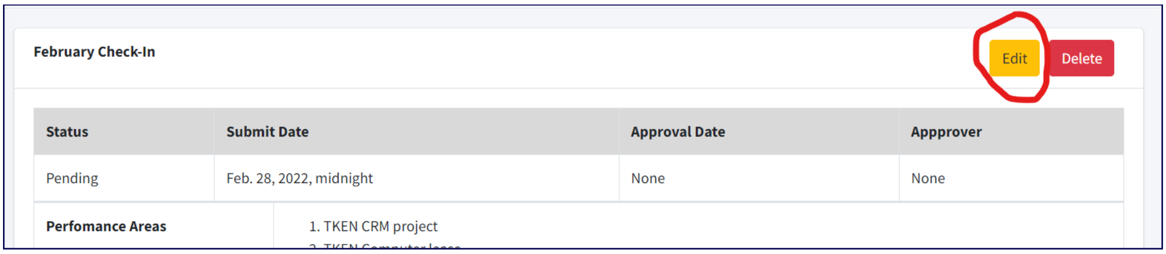
How to edit a Check-In

1. Click on **My Check-In** Link on left navigation panel



2. Click to select Check-In to edit

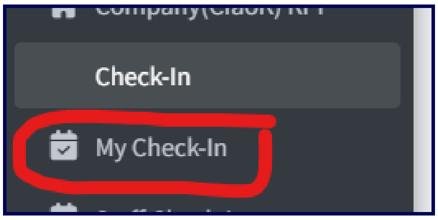
3. Click on "**Edit**" Button to edit the KPI



4. Edit and Submit Check-In

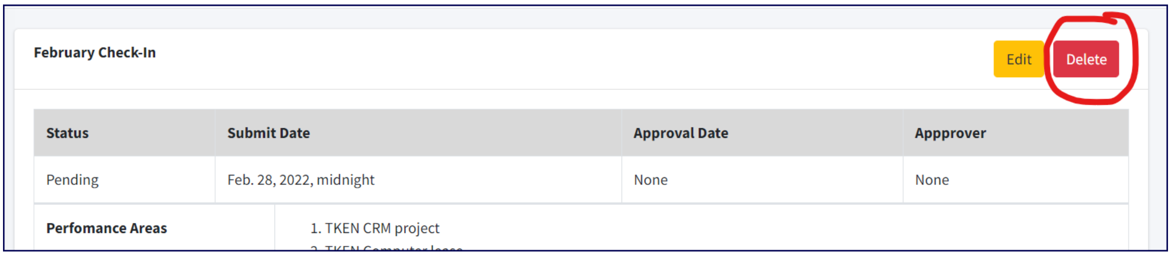
How to delete a Check-In

1. Click on **My Check-In** Link on left navigation panel



2. Click to select Check-In to delete

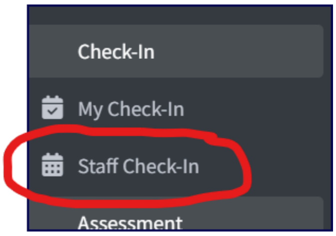
3. Click on "**Delete**" Button to edit the KPI



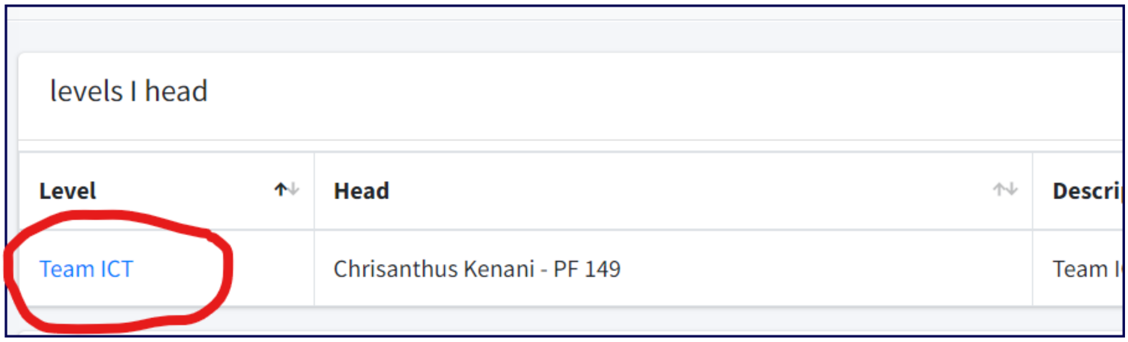
4. Confirm Deletion of KPI

How to approve Check-Ins

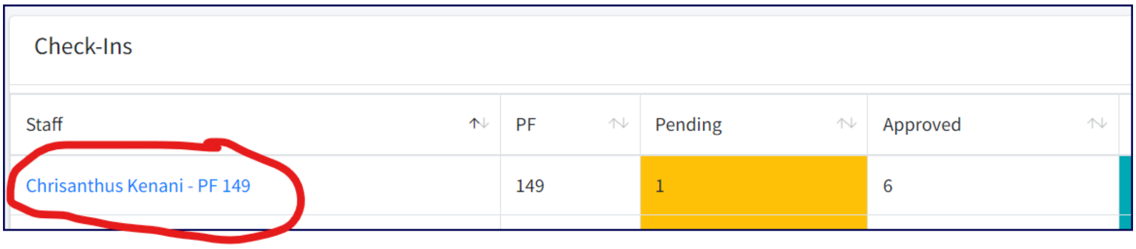
1. Click on **Staff Check-In** Link on left navigation panel



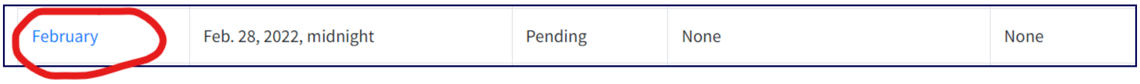
2. Click on team you head



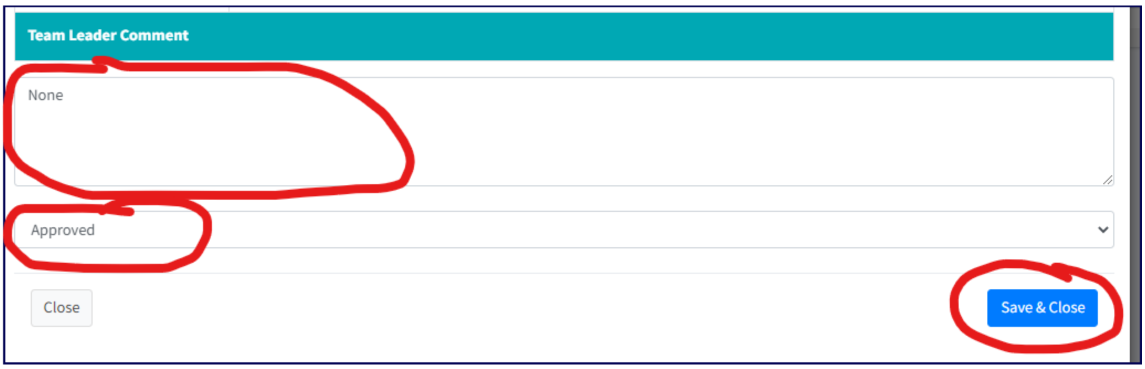
3. Click to select specific staff



4. Click to select specific month



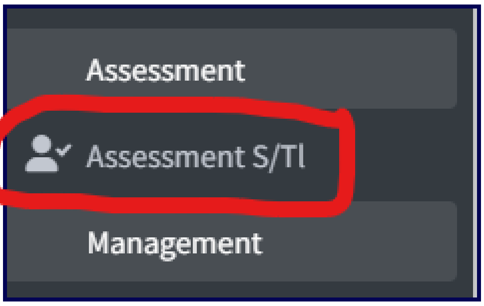
5. Confirm by feeding “Team leader comments” and dropdown to “Approved”



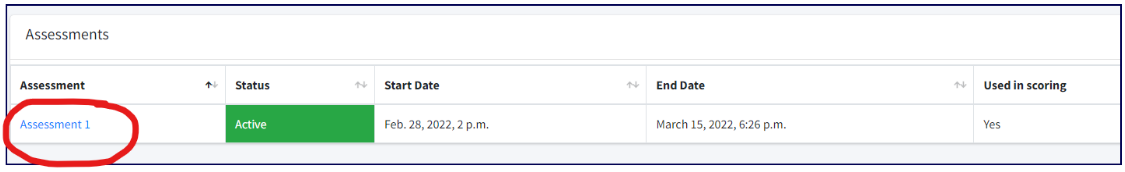
Assessment

How to Submit/Edit an assessment

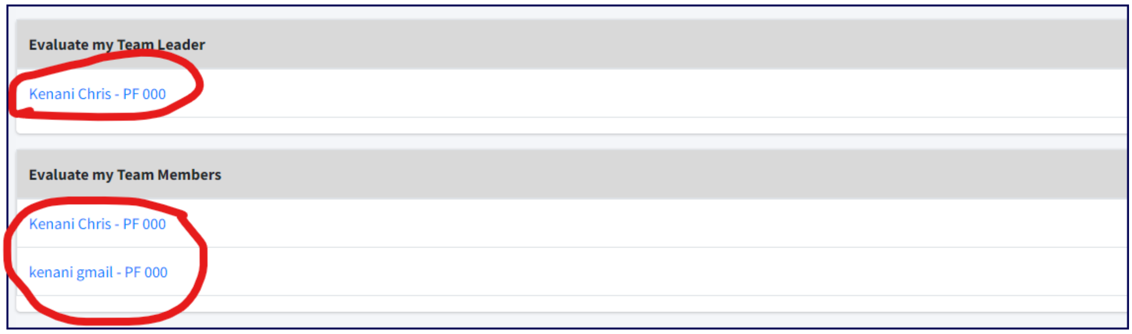
1. Click “**Assessment S/TL**” on the left navigation menu



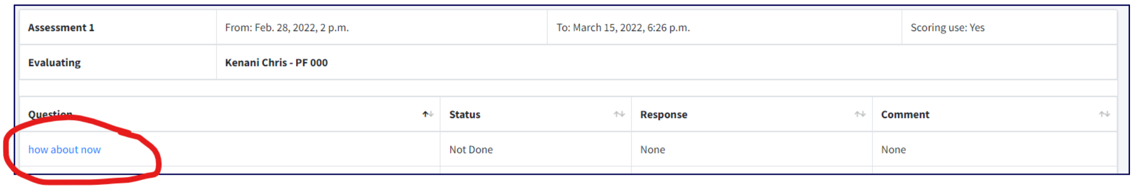
2. Click to select an active/on going assessment



3. Click to select specific staff to Assess



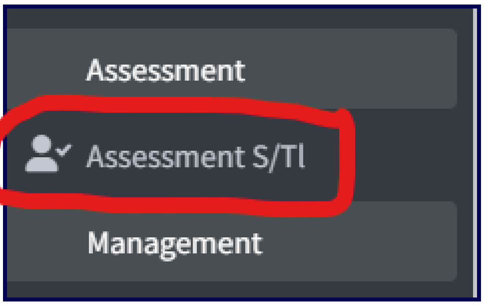
4. Click to select specific Question to assess member/team leader



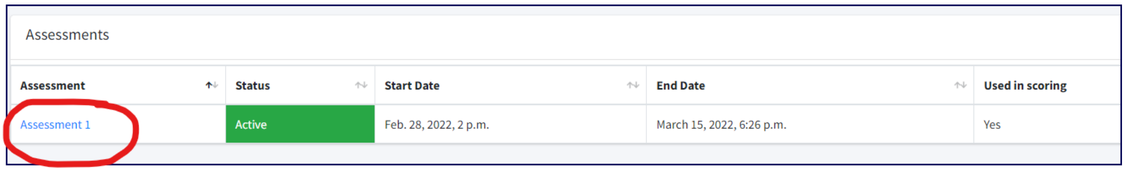
5. Drag to score Team leader/member and feed comment, whenever prompted

How to get assessment Results

1. Click “**Assessment S/TL**” on the left navigation menu



2. Click to select an active/on going assessment

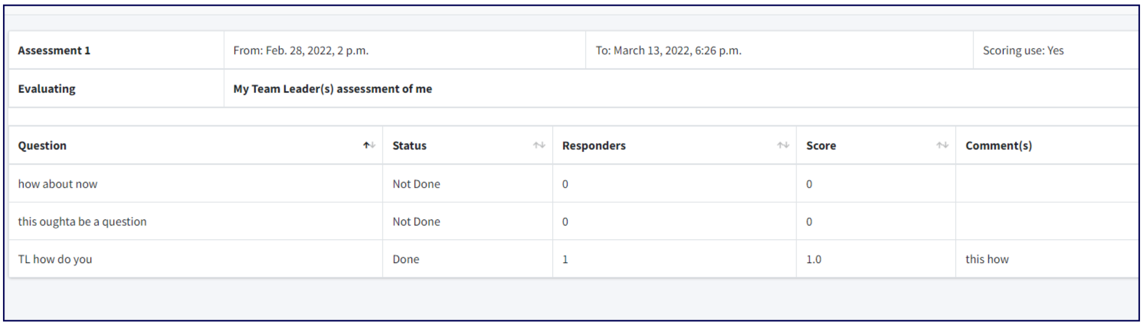


Assessments

Assessment	Status	Start Date	End Date	Used in scoring
Assessment 1	Active	Feb. 28, 2022, 2 p.m.	March 15, 2022, 6:26 p.m.	Yes

3. Click to select type of assessment

4. View Results



Assessment 1	From: Feb. 28, 2022, 2 p.m.	To: March 13, 2022, 6:26 p.m.	Scoring use: Yes
Evaluating	My Team Leader(s) assessment of me		

Question	Status	Responders	Score	Comment(s)
how about now	Not Done	0	0	
this oughta be a question	Not Done	0	0	
TL how do you	Done	1	1.0	this how