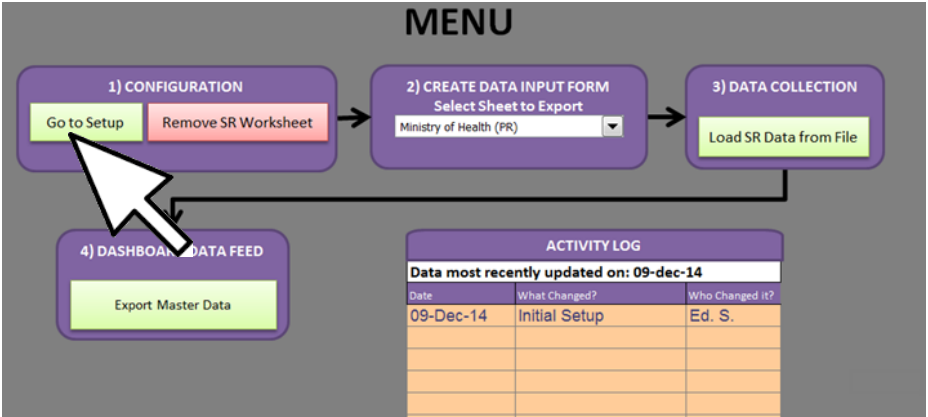


# QUICKSTART: PR MANAGEMENT DASHBOARD

# QUICKSTART: PR MANAGEMENT DASHBOARD

★ To generate the PR Management Dashboard, first obtain and install SAP Crystal Dashboard Design 2011 software, and download PR Data Master ver 2.0 R4 and PR Data Feed ver 2.0 R4 Excel files. For more detail and system requirements, see *Principal Recipient Management Dashboard Installation and Setup Guide*.

1 Open Data Master ver 2.0 R4 file.  
In MENU, click on Go to Setup



★ If you see the message “Safety warning: macros are disabled” along with a window with options, choose “Enable macros ” and click on the Accept button, then continue with Step 1.

2 In new window, click on General Grant Information

Choose language\*, country\*, grant title, grant number, PR name, last rating\*, phase start and end dates, component\*, round, currency\*, date of last rating and current period\*.  
\* from drop-down menus.

★ Last updated is generated automatically from the Menu

The 'General Grant Information' form has a list of fields on the left, some with status icons (green checkmark or red X). A red arrow points from the 'General Grant Information' field to the table on the right.

| General Grant Facts |                    |
|---------------------|--------------------|
| Language            | English            |
| Country:            | Ficticia           |
| Grant Title:        | The AIDS Support   |
| Grant Number        | XX-101-X01-X-00    |
| PR Name             | Ministry of Health |
| Last Rating         | A2                 |
| Phase Start Date:   | 01-jun-12          |
| Phase End date      | 31-may-15          |
| Component           | HIV / AIDS         |
| Round               | RCC                |
| Currency            | \$ - USD           |
| Date of Last Rating | 31-dec-14          |
| Current Period      | Q1-14              |
| Current Period No.  | 8                  |
| Last updated:       |                    |



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3

Click on [SR Names](#)

| INPUT IN ORANGE CELLS          |   | Total SRs | Refresh Worksheet List    |
|--------------------------------|---|-----------|---------------------------|
| 1 General Grant Information    | ✓ | PR/SR     | PR / SRs Names            |
| 2 SR Names                     | ✓ | PR1       | Ministry of Health (PR)   |
| 3 Create New SR Worksheets     | ✗ | SR1       | Data SR 001               |
| 4 Financial Thresholds         | ✗ | SR2       | CPU Affordable Medicines  |
| 5 Product Monitoring           | ✗ | SR3       | Monitoring and Evaluation |
| 6 Indicator Mapping            | ✗ | SR4       | HIV AIDS PV               |
| 7 Refresh prog indicators list | ✗ | SR5       | DSD                       |
| 8 Programmatic Thresholds      | ✗ | SR6       | PMTCT                     |
| 9 Period Dates Check           | ✓ | SR7       | TB Directorate            |
|                                |   | SR8       | NHLS                      |
|                                |   | SR9       | JHPIEGO                   |
|                                |   | SR10      | Aurum                     |
|                                |   | SR11      | Right to Care             |
|                                |   | SR12      | CRS                       |
|                                |   | SR13      | World Vision              |
|                                |   | SR14      | Africare                  |
|                                |   | SR15      | EMAD                      |
|                                |   | SR16      | AcDeV                     |
|                                |   | SR17      | Intermondes               |
|                                |   | SR18      | ASBEF                     |
|                                |   | SR19      | UTELAIN                   |
|                                |   | SR20      | MINERD                    |
|                                |   | SR21      | MESCVT                    |

5

Click on

[Financial Thresholds](#)

To set the thresholds for the three colors to appear, the PR will set the number below which the number will be red, and above which the number will be green.

| INPUT IN ORANGE CELLS          |   | Comment | Financial Indicator | Thresholds-Red | Threshold-Green |
|--------------------------------|---|---------|---------------------|----------------|-----------------|
| 1 General Grant Information    | ✓ | FI1     | Budget              |                |                 |
| 2 SR Names                     | ✓ | FI2     | Disbursed           | 100.00%        | 115.00%         |
| 3 Create New SR Worksheets     | ✓ | FI3     | Expensed            | 70.00%         | 90.00%          |
| 4 Financial Thresholds         | ✗ |         |                     |                |                 |
| 5 Product Monitoring           | ✗ |         |                     |                |                 |
| 6 Indicator Mapping            | ✗ |         |                     |                |                 |
| 7 Refresh prog indicators list | ✗ |         |                     |                |                 |
| 8 Programmatic Thresholds      | ✗ |         |                     |                |                 |
| 9 Period Dates Check           | ✓ |         |                     |                |                 |

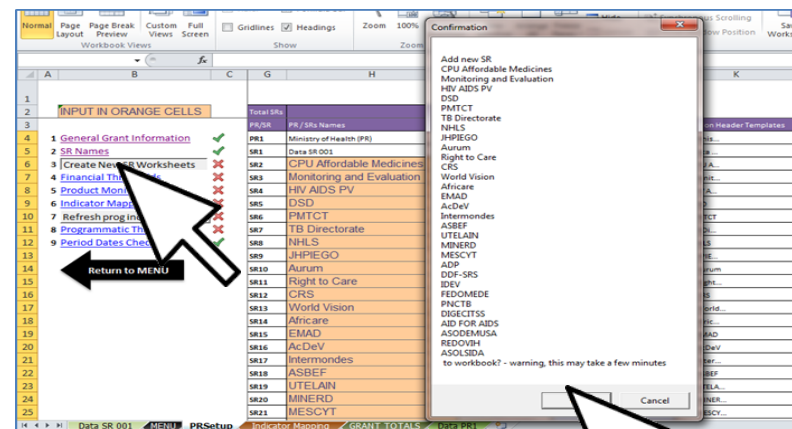
Enter names (maximum 50 characters) of all SRs involved in the grant Up to 49 SR names may be entered. The PR name appears by default at the top of the list.

- ★ ONLY enter names in ORANGE cells.
- ★ LEAVE SR1 as Data SR 001  
(This line is a template used to generate subsequent rows)
- ★ Data in other columns is AUTOMATICALLY generated.

4

Click on [Create New SR worksheets](#)

When the dialogue box opens, click **OK** to continue.



| INPUT IN ORANGE CELLS          |   | Total SRs | Refresh Worksheet List    |
|--------------------------------|---|-----------|---------------------------|
| 1 General Grant Information    | ✓ | PR/SR     | PR / SRs Names            |
| 2 SR Names                     | ✓ | PR1       | Ministry of Health (PR)   |
| 3 Create New SR Worksheets     | ✓ | SR1       | Data SR 001               |
| 4 Financial Thresholds         | ✗ | SR2       | CPU Affordable Medicines  |
| 5 Product Monitoring           | ✗ | SR3       | Monitoring and Evaluation |
| 6 Indicator Mapping            | ✗ | SR4       | HIV AIDS PV               |
| 7 Refresh prog indicators list | ✗ | SR5       | DSD                       |
| 8 Programmatic Thresholds      | ✗ | SR6       | PMTCT                     |
| 9 Period Dates Check           | ✓ | SR7       | TB Directorate            |
|                                |   | SR8       | NHLS                      |
|                                |   | SR9       | JHPIEGO                   |
|                                |   | SR10      | Aurum                     |
|                                |   | SR11      | Right to Care             |
|                                |   | SR12      | CRS                       |
|                                |   | SR13      | World Vision              |
|                                |   | SR14      | Africare                  |
|                                |   | SR15      | EMAD                      |
|                                |   | SR16      | AcDeV                     |
|                                |   | SR17      | Intermondes               |
|                                |   | SR18      | ASBEF                     |
|                                |   | SR19      | UTELAIN                   |
|                                |   | SR20      | MINERD                    |
|                                |   | SR21      | MESCVT                    |

Once the process is complete, a new tab is created for each SR worksheet.

- ★ If new SRs need to be added later, repeat Steps 3-4

7

Click on

[Indicator Mapping](#)

**Indicator Mapping**, allows the PR to customize and allocate indicators at the PR and SR levels.

| INPUT IN ORANGE CELLS          |   | Objectivo | Indicador  | Tipo       | PR1 | SR1 | SR2 | SR3 | SR4 | SR5 | SR6 | SR7 | SR8 | SR9 | SR10 | SR11 | SR12 | SR13 | SR14 | SR15 | SR16 | SR17 | SR18 | SR19 | SR20 | SR21 |
|--------------------------------|---|-----------|--|------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|------|------|------|------|------|------|------|------|------|------|------|
| 1 General Grant Information    | ✓ | FI1       | Presupuesto  | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
| 2 SR Names                     | ✓ | FI2       | Desembolsos  | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
| 3 Create New SR Worksheets     | ✓ | FI3       | Gastos   | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
| 4 Financial Thresholds         | ✗ | FI4       | Informes financieros planificados                                      | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
| 5 Product Monitoring           | ✗ | FI5       | Informes financieros planificados                                      | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
| 6 Indicator Mapping            | ✗ | FI6       | No. de recomendaciones de auditoria no cumplidas                       | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
| 7 Refresh prog indicators list | ✗ | FI7       | No. de recomendaciones de auditoria no cumplidas para dentro del plazo | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
| 8 Programmatic Thresholds      | ✗ | FI8       | No. de recomendaciones de auditoria no cumplidas y fuera del plazo     | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
| 9 Period Dates Check           | ✓ | FI9       | Verifica de supervisión planificada                                    | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
|                                |   | FI10      | Verifica de supervisión no verificadas                                 | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
|                                |   | FI11      | No. de acciones de supervisión recomendadas                            | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
|                                |   | FI12      | No. de acciones de supervisión fuera del plazo                         | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
|                                |   | FI13      | Informes programáticos planificados                                    | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
|                                |   | FI14      | Informes programáticos fuera del plazo                                 | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
|                                |   | FI15      | Personal clave planificado   | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |
|                                |   | FI16      | Personal clave no planificado  | Financiera | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓   | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    | ✓    |

- ★ The PR must then mark “✓” from the dropdown menu (for selected) or “X” (for not selected) for each indicator for the PR and each SR.

This process is valid for all indicators, whether financial, management, PSM, or programmatic.

Once selection and prioritization Indicators sections are completed, press the **Refresh top 15** button. Pressing this button will update the indicator sheet.

Double-check at this stage to ensure programmatic indicators are correct

Go back to [Indicator Mapping](#)

The **Refresh Activation** button prepares the sheets of the PR and SRs.

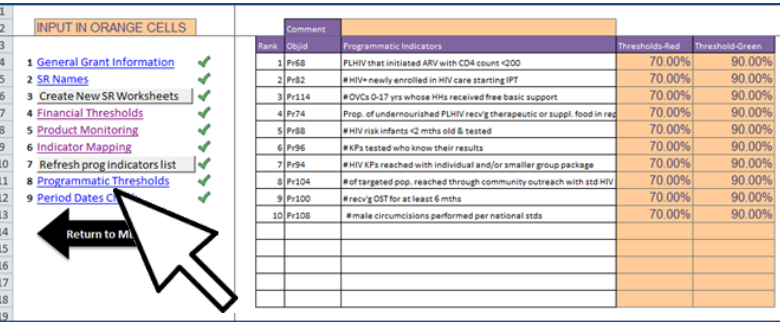
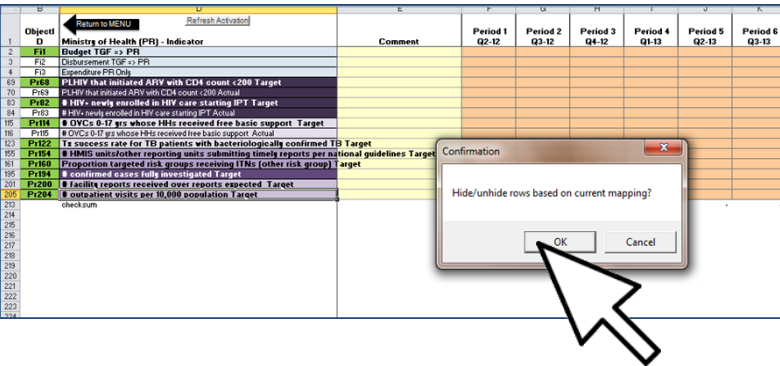
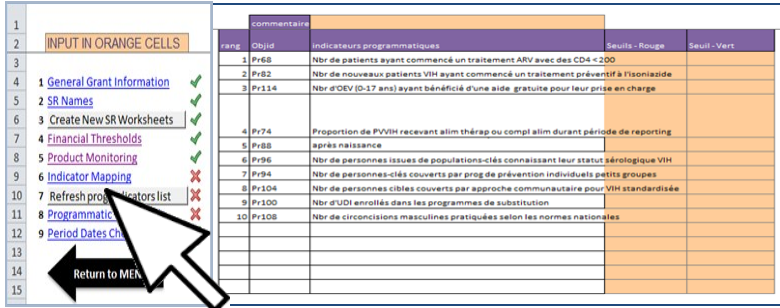
Click on **Ok** to complete the process

Go back to data-entry sheet  
Click on [Programmatic Thresholds](#)

Each indicator may have different thresholds and the PR is responsible for determining these thresholds

Example of thresholds set for a programmatic indicator, using the standard thresholds the Global Fund publishes

|        |               |
|--------|---------------|
| Green  | ≥90%          |
| Yellow | <90% and ≥60% |
| Red    | <60%          |



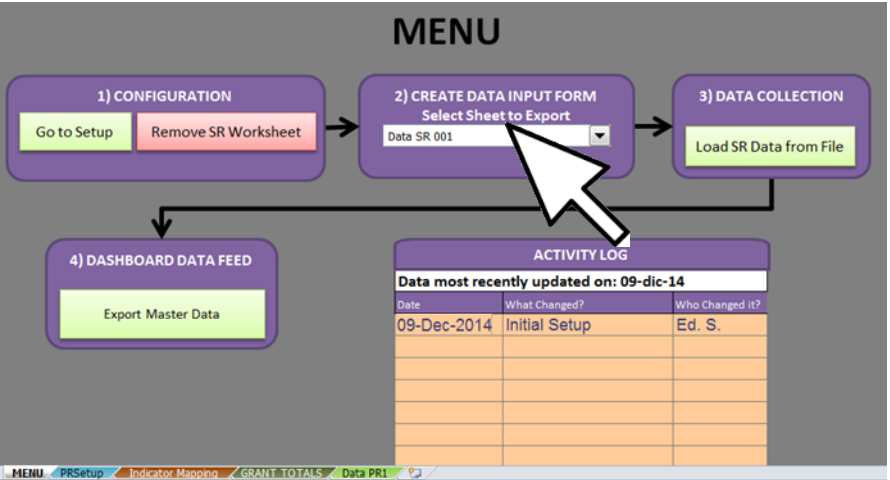
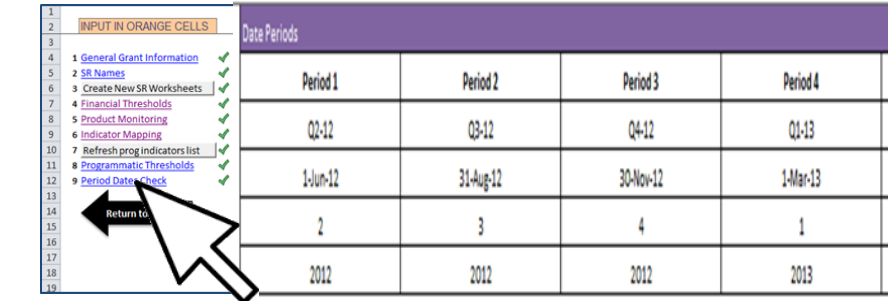
Click on [Period Date Check](#)

This step serves to verify reporting periods that were automatically generated by the application.

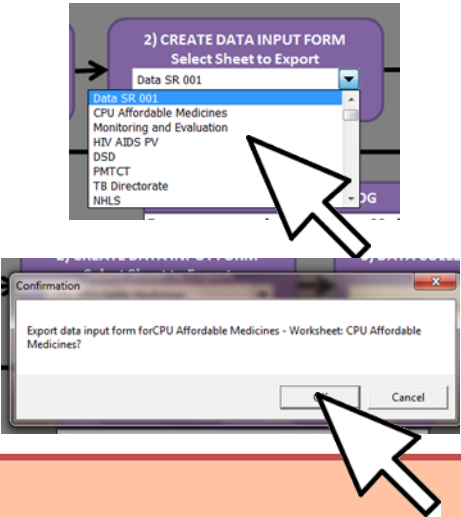
Before proceeding to Step 6, PR Dashboard Administrator must create a folder to which Data Feed files from SRs are saved.



Click on **CREATE DATA INPUT FORM**



When the dialogue box opens, select the corresponding SR from the drop-down menu.  
When an SR is chosen from the drop-down menu, the following message appears.  
Press **Ok** to create data input form.  
Repeat process for each SR.

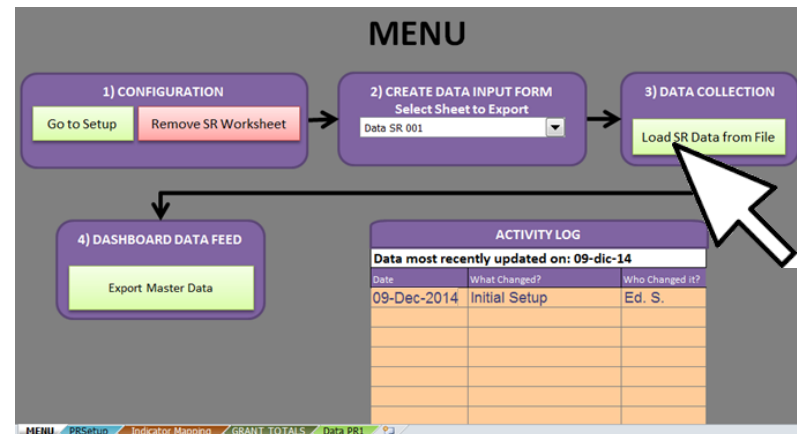


The PR can email the SR the data-entry sheet.  
Otherwise, the PR can provide the SR with the data-entry sheet on a USB or even on paper.  
Once data-entry sheets are received from SR, then go to step 11.



11

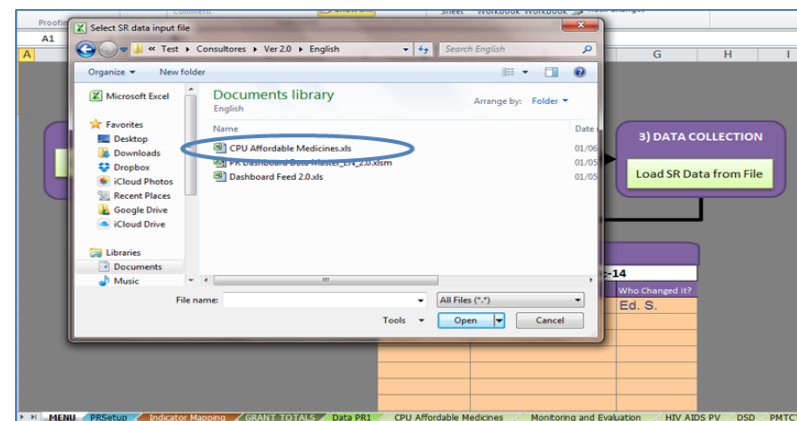
Click on  
**Load SR Data from File**



When the dialogue box opens, select the file to be uploaded, click on **Open**

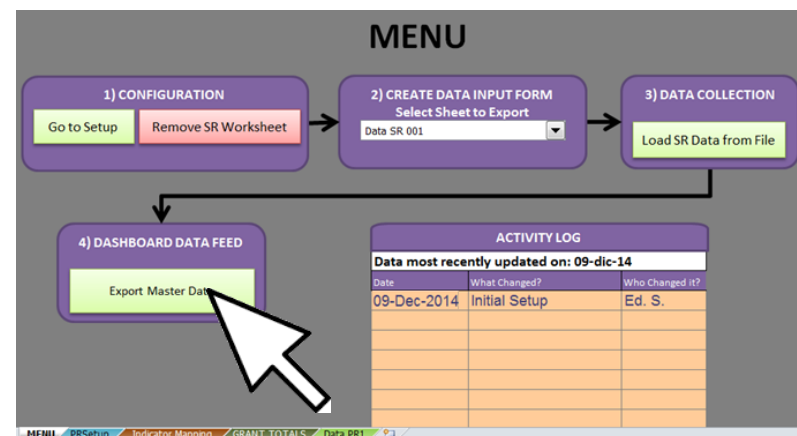
Then the following message appears:  
**"Data importation complete."**

Repeat Step 11 to add all SRs



12

Click on  
**Export Master Data**



In the dialogue box that opens, select  
**PR Dashboard FEED Ver. 2.0 R4**

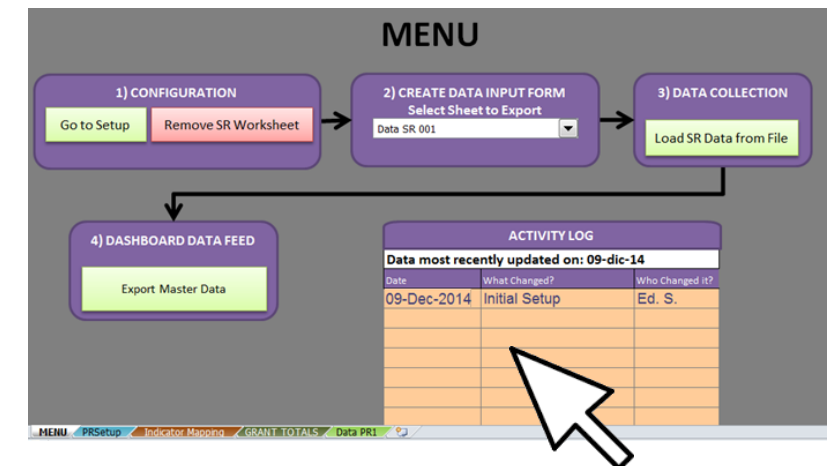
When the data feed export is complete, click **OK**



13

Click on the orange panel to complete **ACTIVITY LOG** with most recent changes.

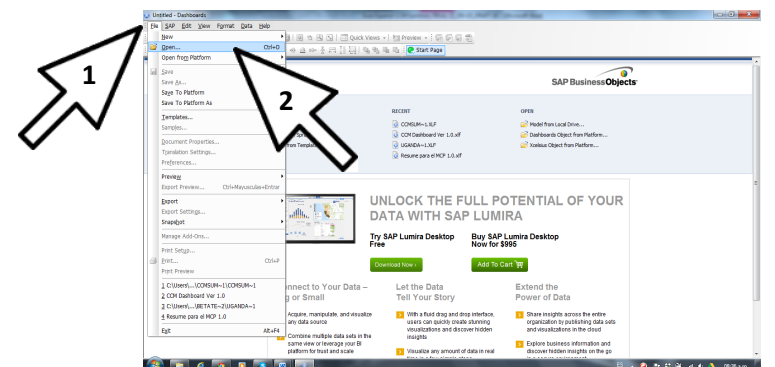
★ Resave file.



14

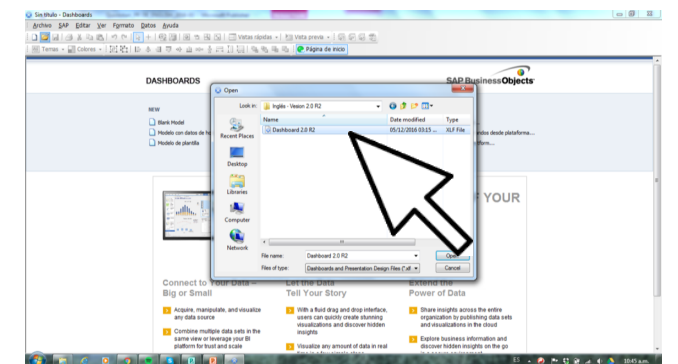
To generate the PR Management Dashboard:  
Open the SAP Dashboard software.

Click on **File** (upper left corner of screen) and **Open**



15

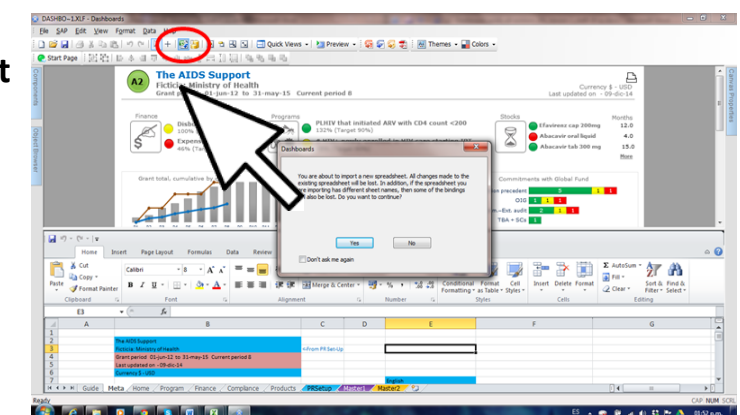
A dialogue box will open with a file library.  
Select the **Dashboard 2.0 R4.xlf** file and click on **Open**



16

Click on the **Import Excel Sheet icon** (to the right of the + sign on the ribbon) OR select **Data** from the top menu, then **Import**

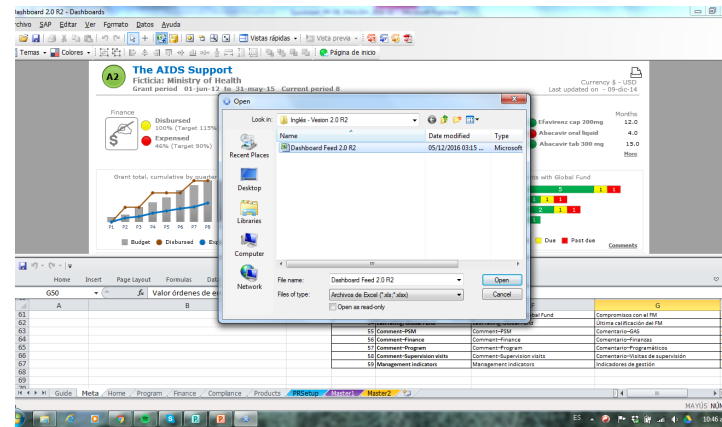
When the dialogue box opens, click on **Yes**



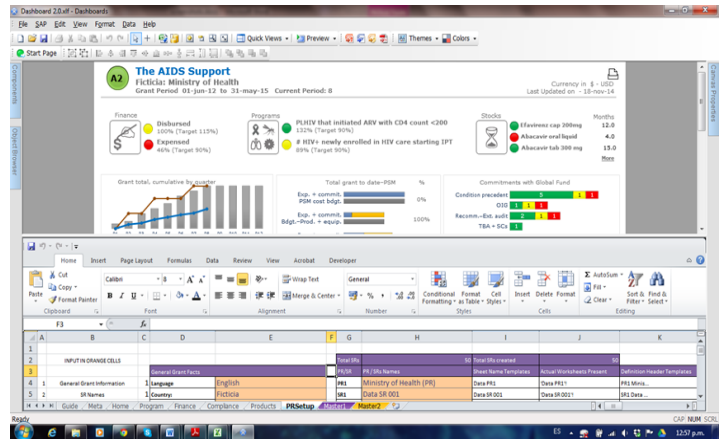
Version 2.0 R4—September 2017

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Select **PR Dashboard FEED Ver. 2.0 R4**  
and click on **Open**



After up to 30 seconds, the PR Dashboard  
will display updated PR data.



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To visualize the PR Dashboard in other file  
formats (for list and suggestions for use,  
see **PR Dashboard User Guide**):

In File menu, select **Export**  
Click on selected format

