

Department of Education  
National Capital Region  
SCHOOLS DIVISION OFFICE - MARIKINA CITY

# Integrated Performance Management System

User Manual

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## Introduction

The Integrated Performance Management System (IPMS) represents a pivotal advancement in the realm of performance management, particularly within the context of implementing programs, projects, and the delivery of services. IPMS is a comprehensive system designed to support the processes of planning, monitoring, evaluation, and reporting, thus enhancing the overall efficiency and effectiveness of the educational workforce. The IPMS plays a pivotal role in aligning the department's objectives with the division's strategic goals, enabling it to better address the needs and aspirations of its clientele.

At its core, IPMS integrates data-driven decision-making, performance metrics, and accountability mechanisms to foster transparency and accountability in the operations of the SDO Marikina City. This system empowers the department to set clear and measurable targets, track progress in real time, and make informed adjustments as needed. Additionally, it allows for data-driven insights to inform policy formulation and resource allocation, ensuring that limited resources are utilized optimally to achieve the schools' educational development objectives. As the SDO Marikina City continues to strive for excellence in service delivery and education development, the adoption of IPMS underscores the commitment to modernizing governance practices and enhancing the design and delivery of programs and services, as well as the quality of life for Marikina City residents.

### What is IPMS?

The Integrated Performance Management System (IPMS) stands as a dynamic strategy harnessed by SDO Marikina City to elevate organizational performance and achieve its objectives with precision. This comprehensive approach involves the seamless fusion of data repositories, portfolios, and task management, enabling the continual monitoring and enhancement of employee performance, ultimately influencing program design and service delivery optimization.

At its core, the IPMS comprises two integral systems, harmoniously unified to form a cohesive framework: the **Integrated Performance Management System**, adept at meticulously tracking and assessing employee performance metrics, and the **Data Management System**, engineered to adeptly handle data storage, processing, and seamless sharing across diverse platforms within the realm of SDO Marikina City. This synergistic integration empowers the organization with the tools needed to streamline operations, align strategies, and institutionalize a culture of excellence, discipline, and good taste.

## **Integrated Performance Management System**

The Integrated Performance Management System (IPMS) is anchored to DepEd's Results-Based Performance Management System (RPMS). It serves as a pioneering and transformative solution to enhance work performance and serves as a rich source of data for continuous learning and development. This innovative system is designed to empower the SDO's workforce and drive strategic improvements in service delivery.

At its core, the IPMS in SDO Marikina City is a structured framework that establishes clear performance expectations, measures, and feedback mechanisms for all employees. Through well-defined performance indicators and key performance objectives, it enables staff to align their efforts with the department's overarching goals. Furthermore, it offers regular performance assessments and feedback sessions, fostering a culture of accountability and continuous improvement. This data-rich environment not only provides a snapshot of individual and team performance but also functions as a dynamic source of insights for learning and development initiatives.

## **Data Management System**

The SDO Data Management System, affectionately known as DECODES (Data Encoding for Convenient Optimum Delivery of Educational Services), represents a cutting-edge solution for the Schools Division of Marikina City. DECODES is more than just a system; it's a vital conduit for the seamless sharing of organizational data, both within the division and with external stakeholders, within the context of educational services. This innovative platform not only streamlines data management but also fosters a collaborative environment that empowers educators, administrators, and the community to collectively enhance the quality of education in Marikina City.

## Setting Up Your IPMS

There are three stages in setting up your IPMS account:

1. **Uploading your annual performance target** – Enhance your performance commitment, monitoring, and evaluation by uploading your annual performance targets. Utilize the provided template to clearly outline your Key Result Areas along with their associated performance objectives and anticipated outputs, quantifying these outcomes from January through December of the current year.
2. **Creating your portfolio** – A Portfolio serves as a vital tool for efficiently organizing and overseeing programs, projects, activities, and services in alignment with the strategic objectives of SDO Marikina City. It empowers you to establish clear milestones, effectively prioritize tasks and workloads, foster collaboration, and facilitate seamless resource sharing among project team members.
3. **Adding and managing your tasks** - One of the primary objectives of the IPMS is to streamline your daily tasks and workloads, aligning them with your performance targets. Whether you're incorporating routine tasks or setting schedules, the platform empowers you to calculate the comprehensive workload you must complete over a specified time frame.

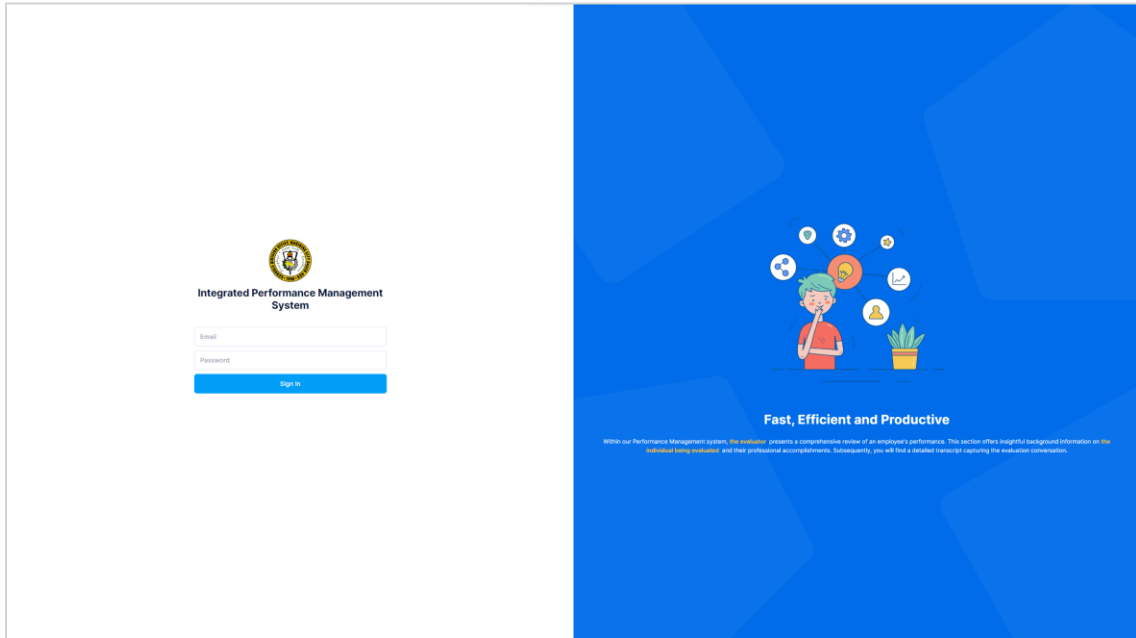
## The IPMS User Interface

The IPMS User Interface is composed of the following:

1. Sign in Page
2. IPMS Dashboard
3. Performance Targets Page
4. Portfolio Page
5. Tasks page
6. Teams Page
7. Accomplishment Report Page

## Sign in Page

The **Sign In** page provides secure access to your account, prompting you to enter your registered email and password. With a sleek design and user-friendly interface, it ensures a seamless authentication experience for accessing personalized content and services.



### Signing in using username and password

1. Launch your preferred web browser (Chrome, Edge, Safari, Firefox, etc.).
2. Input the URL **<https://ipms.depedmarikina.ph>** and press Enter.
3. Enter your registered email and password in the appropriate fields.

**Note to user:** Use your Employee Self-Service (ESS) registered email and password for this purpose. In case of a forgotten password, contact the Systems Administrator.

4. Click the “**Sign in**” button or press Enter.

## The IPMS Dashboard Page

The screenshot shows the IPMS Dashboard interface. At the top left is the user profile for Ryan Lee Regencia, Information Technology Officer I, ICTU. The main dashboard area includes:

- Target Completion:** As of May 13, 2024, the rate is 0.00%.
- Expected Outputs:** As of May 13, 2024, the fraction is 0 / 72.
- Task Management as of May 13, 2024:**
  - Completed Tasks: 0 / 0 | 0%
  - Pending Tasks: 0 / 0 | 0%
  - In Progress Tasks: 0 / 0 | 0%
  - Scheduled Tasks: 0 / 0 | 0%
- Number of Portfolios:** 0 Active Programs, 0 Active Projects, 0 Active Services, and 0 Activities.
- Tasks for this Week (May 13 - May 17):** No Task Found.
- Portfolio:** No Portfolio Found.

After a successful sign-in, you will be redirected to the IPMS Dashboard that provides access to the following details:

Profile card for Ryan Lee Regencia, Information Technology Officer I, ICTU. The card features the organization's logo and the user's name and title.

Your complete name, position, and department (office or unit).

Target Completion card showing a rate of 0.00% as of May 13, 2024.

The target completion rate is calculated by dividing the total actual number of targets achieved by the total number of targets, and then multiplying the result by 100 to express it as a percentage.

Expected Outputs card showing a fraction of 0 / 0 as of May 13, 2024.

The expected number of outputs is a fraction. The numerator is the total actual targets achieved, and the denominator is the total number of targets required. This fraction indicates progress towards meeting the set targets.

Task Management Status section as of May 13, 2024:

- Completed Tasks: 0 / 0 | 0%
- Pending Tasks: 0 / 0 | 0%
- In Progress Tasks: 0 / 0 | 0%
- Scheduled Tasks: 0 / 0 | 0%

The Task Management Status section displays various task categories such as completed tasks, pending tasks, tasks in progress, and scheduled tasks. Additionally, it provides a fraction where the numerator represents the total actual number of tasks achieved, and the denominator

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represents the total number of tasks listed across all categories.

For computation: Calculate the percentage by dividing the number of tasks of that type by the total number of tasks listed. Then, multiply the result by 100 and round it to two decimal points for accuracy.

Number of Portfolios

0 Active Programs      0 Active Projects

0 Active Services      0 Activities

Number of existing portfolios (i.e., Programs, Projects, Activities, and Services) connected to your account.

Tasks for this Week (May 13 - May 17) [View all Tasks](#)

Task Description ^	Portfolio Name	Status
No data available in table		

10 ▾ Showing no records < >

Tasks scheduled for the week are listed here. Additionally, there is a hyperlink labeled 'View all Tasks' that will redirect you to the Tasks page for a comprehensive overview.

Portfolio [View all Portfolio](#)














Portfolio Name ^	Tasks	Progress	Status	Role
No data available in table				

10 ▾ Showing no records < >

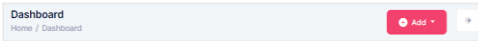
This is a list of portfolios connected to your account. Additionally, a hyperlink labeled 'View all Portfolios' is provided, which will redirect you to the Portfolios page for a comprehensive overview of all your portfolios.

## Navigating the IPMS

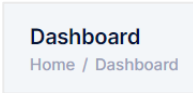
The **side navigation bar** within the IPMS (Integrated Performance Management System) serves as a central hub for accessing key sections and features designed to streamline project management and performance tracking. Each section provides access to specific functionalities tailored to enhance efficiency and effectiveness within the system.

	Buttons	Functionality
		<i>Dashboard</i> Click to view an overview of project performance and key metrics.
		<i>Targets</i> Click to access the Performance Targets page to view and manage your project's performance objectives.
		<i>Portfolio</i> Click to manage your project portfolio, including project details and progress.
		<i>Tasks</i> Click to manage project tasks, assign them, and track their status.
		<i>Teams</i> Click to manage team members, roles, and permissions.
		<i>Reports</i> Click to generate and view detailed reports on project accomplishments and performance.
		<i>Office Performance</i> Click to analyze performance metrics for your office or department.
		<i>Data Portal</i> Click to access comprehensive project data and analytics.
		<i>IPMS Manual</i> Click to view the IPMS Manual.
		<i>User Settings</i> Click to access the menu: My Profile and Sign Out button.
		<div data-bbox="782 1579 976 1621"> <a href="#">My Profile</a>  </div> <div data-bbox="1024 1579 1398 1648">           Click to view and edit personal information.         </div>
		<div data-bbox="782 1684 976 1726"> <a href="#">Sign Out</a>  </div> <div data-bbox="1024 1684 1398 1789">           Click to securely end your session and protect your account.         </div>

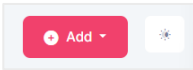
## The Site Header



The **site header** is located at the top of every page. It displays the title of the current page you are viewing.

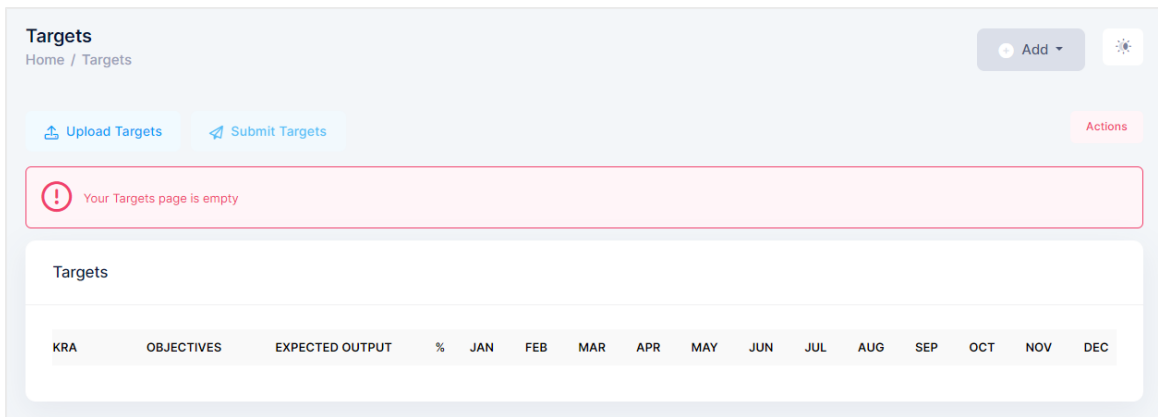


Beneath the title, you will find the **breadcrumb trail**, that shows the current location and is updated as you navigate through the site, and serves as a handy way to return to the Dashboard.



On the right-hand side of the site header, you'll spot the **"Add Task"** button and **"Accessibility"** options. These essential buttons remain accessible from every page across the site for your convenience.

## Performance Targets Page


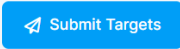
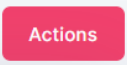
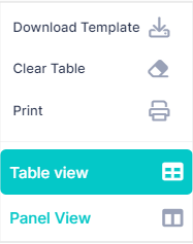


The **Performance Targets page** offers a straightforward way to submit your yearly performance targets using a provided template. It serves as a practical monitoring tool, enabling monthly updates to your performance data.

## Targets Page Toolbar

This toolbar facilitates the management of performance targets. It houses the Upload Targets, Submit Targets, and the Actions buttons.



	Button	Function	Condition
		<i>Upload Targets</i>	Shows the file upload dialog box  <i>Default: Enabled.</i>  Disabled only when the performance targets table is not empty.
		<i>Submit Targets</i>	Submits the uploaded performance targets and enables the button for creating a portfolio and adding task and event  <i>Default: Disabled.</i>  Enabled only when uploaded performance targets total is at 100%.
		<i>Actions</i>	Hides and displays the actions menu  <i>None</i>
		<i>Download Template</i>	Downloads the prescribed template for uploading the performance targets  <i>None</i>
		<i>Clear Table</i>	Deletes the entries in the performance target table  <i>Default: Disabled.</i>  Enabled only when the performance targets table is not empty and not yet submitted.
		<i>Print</i>	Prints the table  <i>Default: Disabled.</i>  Enabled only when the performance targets table is not empty.
		<i>Table View</i>	Default view  <i>None</i>
		<i>Panel View</i>	Displays the performance targets in separate panels  <i>None</i>

## Setting Performance Targets

### Accomplishing the Prescribed Template

1. Navigate to the Performance Targets page, click the **“Actions”** button and select **“Download Template”** button. This will download the prescribed template for the uploading of your annual performance targets.



2. Fill each column with the appropriate content based on your Individual Performance Commitment Review Form (IPCRF):

Column A - Key Result Area [targets\_kra]

Column B - Objectives [targets\_objectives]

Column C - Percentage [percentage]

Column D - Expected Output [expected\_output]

Columns E to P - Physical Targets (quantity)

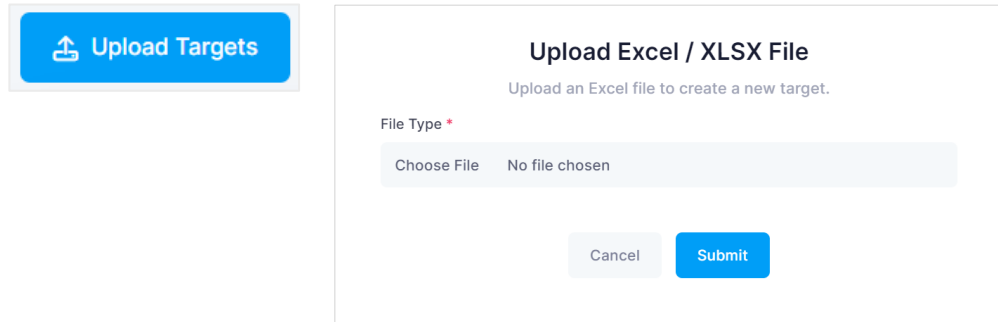
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	targets_kra	targets_objectives	percentage	expected_output	january	february	march	april	may	june	july	august	september	october	november	december
1	ICT Systems and Infrastructure Management	Maintain 100% availability of IT infrastructure essential for service delivery and operations	15	Critical IT infrastructure components, such as servers, networks, and systems, remain operational and accessible at all times without any significant downtime or disruptions	1	1	1	1	1	1	1	1	1	1	1	1
2	ICT Systems and Infrastructure Management	Maintain 100% availability of ICT-based systems used to increase service efficiency; Maintenance of existing SDO eGovernance platforms	25	All existing eGovernance platforms within the Schools Division Office (SDO) remain fully functional and accessible. (Division website, IPMS, ODS, ESS, Inoventory, SDR)	6	6	6	6	6	6	6	6	6	6	6	6
3	ICT programs and projects implementation	Achieve 100% alignment on strategic objectives relative to ICT aligned with promoting governance and addressing school needs	20	All ICT initiatives and projects within the organization are fully aligned with the strategic objectives of promoting governance and addressing the needs of schools.	1	1	1	1	1	1	1	1	1	1	1	1
4	ICT policies and standards implementation	Achieve 100% compliance on targeted streamlined policies and governance processes that align IT solutions with customer expectations and service requirements	10	All IT services, policies, and governance processes are fully compliant with targeted streamlined policies and align with customer expectations and service requirements	1	1	1	1	1	1	1	1	1	1	1	1
5	Technical assistance to schools on integration of ICT in school governance, teaching and learning	Achieve 100% accomplishment on programmed workloads relating to ICT integration for teaching and learning	10	Successfully completed all planned tasks and activities related to integrating ICT into teaching and learning processes	1	1	1	1	1	1	1	1	1	1	1	1
6	Technical assistance to schools on integration of ICT in school governance, teaching and learning	Achieve 100% accomplishment of the programmed workloads on assisting the LRMDOS	2	Successfully completed all planned tasks and activities related to supporting the Learning Resource Management and Development System (LRMDS)	1	1	1	1	1	1	1	1	1	1	1	1
7	Partnerships and stakeholder management	Achieve 100% completion of ICT related learning and development programs for teaching and non-teaching personnel	10	All planned ICT training initiatives for both teaching and non-teaching staff are successfully executed and completed	0	0	0	0	1	0	0	1	0	0	0	0
8	Partnerships and stakeholder management	Ensure 100% alignment of ICT resources based on program requirements	5	All necessary ICT resources, including hardware, software, network infrastructure, and other technological tools, are allocated according to the specific needs and demands of the programs or projects in place	0	0	0	0	1	0	0	0	0	0	0	0
9	ICT M&E	Achieve 100% compliance of schools on ICT PPA requirements	3	All schools within the jurisdiction adhere to the prescribed ICT Procurement Plan and Activities (PPA) requirements set forth by the Schools Division Office (SDO) or relevant governing body	1	1	1	1	1	1	1	1	1	1	1	1
10																

**Note to user:** Instructions on how to fill the template will be provided during the training. Use only the prescribed template to avoid errors during uploading.

3. Save the file, after accomplishing the template. You may rename the file for easier identification.

## Uploading the Template

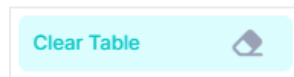
1. On the same page, click the “**Upload Targets**” button. A pop-up will appear on the screen.



2. Click “**Choose File**” and locate the template you have accomplished.
3. Click the “**Submit**” button to start uploading.

## Clearing the Table

1. Navigate to the Performance Targets page. Click the “**Actions**” button and select “**Clear Table**”. This will clear the targets you have uploaded.

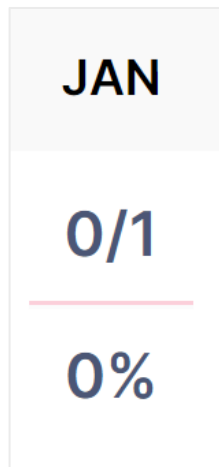


**Note to user:** You can clear the table only if the targets have not yet been submitted.

## Updating the Target Accomplishments

This feature simplifies the process of adjusting your targets to match your evolving goals. To update a target, simply click on the corresponding target under the desired month column. This action triggers a convenient pop-up window, guiding you through the process of modifying the target number to align with your current objectives.

**Note to user:** The Target value can only be manually updated if the performance targets have not yet been submitted.



**Update Accomplishment** ×

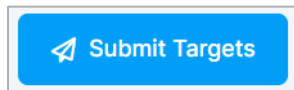
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Target

Actual Accomplishment

### Submitting the Targets

1. Navigate to the Performance Targets page. Click the **“Submit Targets”** button. This will submit the uploaded performance targets and enables the button for creating a portfolio and adding task and event.



### Connecting a Folder to your Expected Outputs

Beyond managing your performance targets, you have the capability to organize your Means of Verification (MOVs) or evidences by leveraging cloud storage and integrating it with your expected outputs. This functionality allows for seamless storage and retrieval of supporting documentation, ensuring clarity and accountability in achieving your goals. You may use your Google Drive or One Drive cloud storage for this purpose.

**Note to user:** Instructions on how to fill the template will be provided during the training. Use only the prescribed template to avoid errors during uploading.

1. On the same page, click the **“Folder”** ( ) icon. A pop-up will appear on screen.

KRA	OBJECTIVES	EXPECTED OUTPUT
ICT Systems and Infrastructure Management	Maintain 100% availability of IT infrastructure essential for service delivery and operations	Critical IT infrastructure components, such as servers, networks, and systems, remain operational and accessible at all times without any significant downtime or disruptions

**Link Output to Portfolio**
✕

---

Output: Critical IT infrastructure components, such as servers, networks, and systems, remain operational and accessible at all times without any significant downtime or disruptions

File/Folder URL

Remove
Save

2. Copy and paste the shared link of your folder from your cloud storage.

**Link Output to Portfolio**
✕

---

Output: Critical IT infrastructure components, such as servers, networks, and systems, remain operational and accessible at all times without any significant downtime or disruptions

File/Folder URL  
<https://docs.google.com/spreadsheets/d/1Jgr47KqsTBapUCG>

Remove
Save

3. Click **“Save”**. The linked text will transform into a clickable hyperlink. You can confirm this transformation by clicking on the text, which should now direct you to the linked folder.

KRA	OBJECTIVES	EXPECTED OUTPUT
ICT Systems and Infrastructure Management	Maintain 100% availability of IT infrastructure essential for service delivery and operations	<a href="#">Critical IT infrastructure components, such as servers, networks, and systems, remain operational and accessible at all times without any significant downtime or disruptions</a>

## Removing Linked Folder

1. To remove a linked folder, click the “Folder” (■) icon to open the pop-up.

Link Output to Portfolio ×

Output: Critical IT infrastructure components, such as servers, networks, and systems, remain operational and accessible at all times without any significant downtime or disruptions

File/Folder URL  
<https://docs.google.com/spreadsheets/d/1Jgr47KqsTBapUCG>

Remove Save

2. Click “Remove”. The pop-up will automatically close. As a result, the text will no longer be clickable, indicating the removal of the hyperlink.

## Changing Performance Targets View

Users have the flexibility to choose between two distinct viewing options: Table view and Panel view. Each view offers a unique presentation style tailored to suit different preferences and workflows. To change the view, simply click the “Actions” button and select your preferred view.

### Table View

KRA	OBJECTIVES	EXPECTED OUTPUT	%	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
ICT Systems and Infrastructure Management	Maintain 100% availability of IT infrastructure essential for service delivery and operations	Critical IT infrastructure components, such as servers, networks, and systems, remain operational and accessible at all times without any significant downtime or disruptions	15	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%
	Maintain 100% availability of ICT-based systems used to increase service efficiency: Maintenance of existing SDO eGovernance platforms	All existing eGovernance platforms within the Schools Division Office (SDO) remain fully functional and accessible. (Division website, IPMS, ODTs, ESS, Innoventory, SOIL)	25	0/6 0%	0/6 0%	0/6 0%	0/6 0%	0/6 0%	0/6 0%	0/6 0%	0/6 0%	0/6 0%	0/6 0%	0/6 0%	0/6 0%

**Note to user:** The “Folder” icon is exclusively available in the Table view.

## Panel View

**Targets**  
Home / Targets

Upload Targets Submit Targets

**KEY RESULT AREAS**

- ICT M&E
- ICT policies and standards implementation
- ICT programs and projects implementation
- ICT Systems and Infrastructure Management
- Partnerships and stakeholder management
- Technical assistance to schools on integration of ICT in school governance, teaching and learning

**OBJECTIVES**

- Maintain 100% availability of IT infrastructure essential for service delivery and operations
- Maintain 100% availability of ICT-based systems used to increase service efficiency; Maintenance of existing SDO eGovernance platforms
- Achieve 100% alignment on strategic objectives relative to ICT aligned with promoting governance and addressing school needs
- Achieve 100% compliance on targeted streamlined policies and governance processes that align IT solutions with customer expectations and service requirements
- Achieve 100% accomplishment on programmed workloads relating to ICT integration for teaching and learning
- Achieve 100% accomplishment of the programmed workloads on assisting the LRMS
- Achieve 100% completion of ICT related learning and development programs for teaching and non-teaching personnel
- Ensure 100% allotment of ICT resources based on program requirements
- Achieve 100% compliance of schools on ICT PPA requirements

**EXPECTED OUTPUT**

Expected Output: Critical IT infrastructure components, such as servers, networks, and systems, remain operational and accessible at all times without any significant downtime or disruptions **15%**

**PERFORMANCE / TARGETS**

TARGET	ACTUAL	RATINGS	GAP
1	0	0	100

MONTH	PERFORMANCE	GAP
JANUARY	0/1 0%	100%
FEBRUARY	0/1 0%	100%
MARCH	0/1 0%	100%
APRIL	0/1 0%	100%
MAY	0/1 0%	100%
JUNE	0/1 0%	100%
JULY	0/1 0%	100%
AUGUST	0/1 0%	100%
SEPTEMBER	0/1 0%	100%
OCTOBER	0/1 0%	100%
NOVEMBER	0/1 0%	100%
DECEMBER	0/1 0%	100%

**KEY RESULT AREAS**

- ICT M&E
- ICT policies and standards implementation
- ICT programs and projects implementation
- ICT Systems and Infrastructure Management
- Partnerships and stakeholder management
- Technical assistance to schools on integration of ICT in school governance, teaching and learning

**OBJECTIVES**

- Maintain 100% availability of IT infrastructure essential for service delivery and operations
- Maintain 100% availability of ICT-based systems used to increase service efficiency; Maintenance of existing SDO eGovernance platforms
- Achieve 100% alignment on strategic objectives relative to ICT aligned with promoting governance and addressing school needs
- Achieve 100% compliance on targeted streamlined policies and governance processes that align IT solutions with customer expectations and service requirements

In Panel View, the default display includes only the Key Result Areas (KRAs) and objectives.

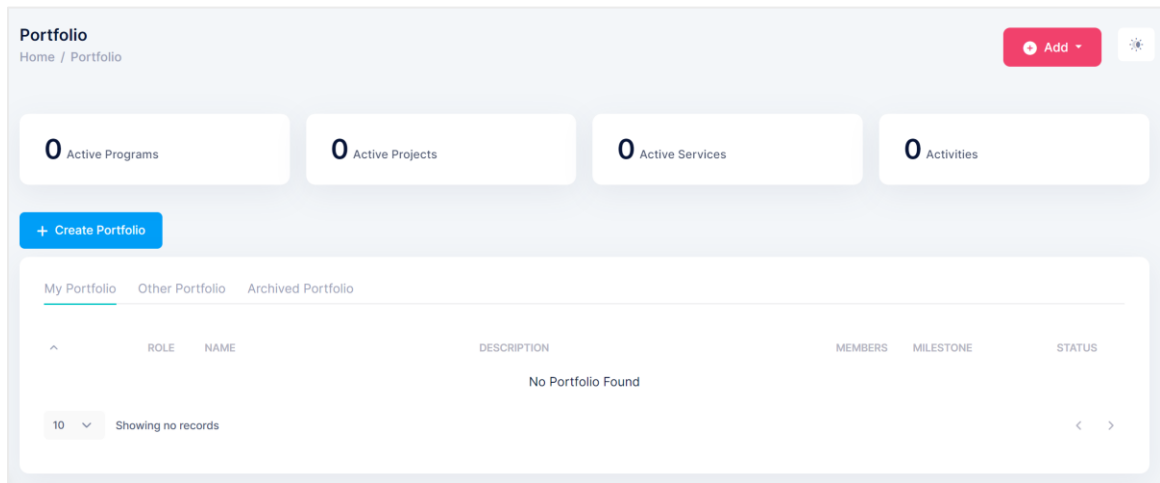
Maintain 100% availability of IT infrastructure essential for service delivery and operations

To view the Expected Output of a specific objective, simply click on the objective.

Expected Output: Critical IT infrastructure components, such as servers, networks, and systems, remain operational and accessible at all times without any significant downtime or disruptions **15%**

Additionally, to display the Performance Targets associated with the Expected Output, click on the specific Expected Output.

## The Portfolio Page

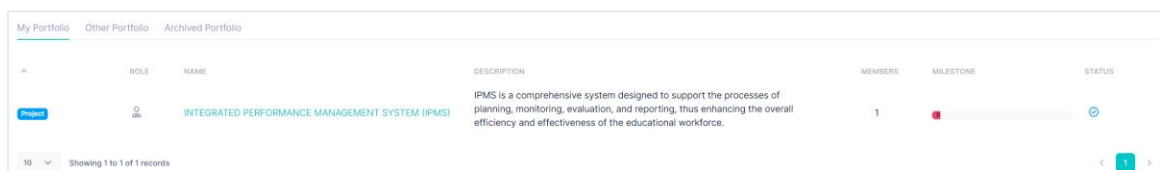


The **Portfolio** page offers a complete snapshot of your current programs, projects, activities, and services. It simplifies the process of organizing, monitoring, and assessing the performance and status of each portfolio, enabling a more thorough understanding of your initiatives. With user-friendly tools and readily available data, this page empowers you to make informed decisions, optimize resource allocation, and work towards achieving your strategic objectives.

### Types of Portfolios

- **Program** are coordinated activities that address and support the organization's long-term goals and include a range of interventions, such as policies, services, and efforts.
- **Project** are temporary initiatives designed to achieve a specific objective and are often time-bound with a defined scope, budget, and timeline.
- **Activity** refers to specific tasks or actions that are undertaken to achieve the overall goals and objectives.
- **Service** refers to a specific offering or support mechanism provided by SDO Marikina City to schools, employees, or to the general public such as administrative assistance, counseling, partnerships, finance, etc. aimed at facilitating learning and enhancing the educational experience.

### Portfolio Display



Portfolios are displayed and arranged in tabs:

- **My Portfolios** - This tab displays the portfolios you've created and currently oversee.
- **Other Portfolios** - This tab displays the portfolios created and managed by others.
- **Archived Portfolio** – This tab displays the portfolios you have archived.

## Managing Your Portfolio

### Create Portfolio ×

- Step 1**  
Portfolio Details
- Step 2**  
Key Result Area
- Step 3**  
Portfolio Information
- Step 4**  
Portfolio Permissions

**Intermediate Outcome \***

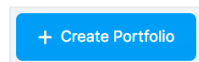
Select Outcome ▼

**Portfolio Type \***

Select Portfolio Type ▼

**Continue**

1. To create a portfolio, click the “**Create Portfolio**” button, and a pop-up will appear on the screen.



2. Select an **Intermediate Outcome**. An intermediate outcome is a measurable result or change that occurs as a direct consequence of program activities and contributes to achieving the overall goal, typically representing progress toward the intended impact.

**Intermediate Outcome \***

Select Outcome ▼

3. Select the **Portfolio Type** of portfolio you would like to create (i.e., Programs, Projects, Activities, Services).

**Portfolio Type \***

Select Portfolio Type ▼

4. Select the **Key Result Area**. The values displayed in the dropdown depend on your uploaded performance targets.

Key Result Area \*

Select an option

**Note to user:** *Uploading your Performance Targets and managing your portfolio are necessary steps before you can proceed to creating a portfolio.*

5. Select the **Objective**. The dropdown should display your performance objectives.

Objectives \*

Select an option

6. Type in the **Portfolio Name** (a definitive name of the program, project, activity, or service). This should coincide with the defined and approved programs, projects, activities, or services assigned to you or to your unit.

Portfolio Name \*

7. Type in a short **Portfolio Description**. The value should be the same as the description of the approved program, project, activity, or service.

Portfolio Description \*

8. The default value for **Status** is Active.

Status \*

Active

9. Toggle the **Portfolio Permission** to set the appropriate access level for users joining your portfolio. Note that the option to "Allow members to send and receive feedback" is enabled by default.

Portfolio Permissions

Allow members to view each others tasks

Allow members to view shared files

Allow members to send and receive feedback

Allow members to view each others notes

10. To save, click the “**Add Portfolio**” button. After clicking, the 'My Portfolio' table will reload, revealing the newly added portfolio.

11. To edit a portfolio, simply navigate to the Portfolio Page, find the 'My Portfolio' table, and click on the name of the portfolio you need to edit.

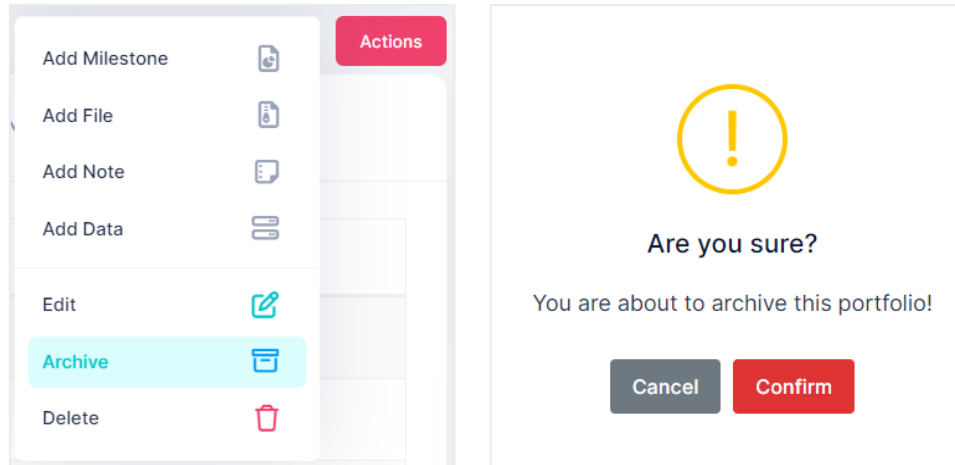
ROLE	NAME	DESCRIPTION	MEMBERS	MILESTONE	STATUS
Project	INTEGRATED PERFORMANCE MANAGEMENT SYSTEM (IPMS)	IPMS is a comprehensive system designed to support the processes of planning, monitoring, evaluation, and reporting, thus enhancing the overall efficiency and effectiveness of the educational workforce.	1	<div style="width: 100%;"><div style="width: 100%;"></div></div>	<span>✓</span>

12. Once you have clicked on the portfolio, locate the “**Actions**” button positioned at the middle right side. Hover over it, and a dropdown menu will appear. From there, select the “**Edit**” option. Upon selection, a pop-up will appear on the right side of the screen.

The image shows two parts of the interface. On the left, a dropdown menu is open under the 'Actions' button, listing options: Add Milestone, Add File, Add Note, Add Data, Edit (highlighted), Archive, and Delete. On the right, the 'Update Portfolio' modal is displayed for the 'Integrated Performance Management System (IPMS)'. The form includes fields for: Intermediate Outcome (Enabling Mechanisms-Governance), Portfolio Type (Project), Key Result Area (ICT policies and standards implementation), Objectives (Achieve 100% compliance on targeted streamlined policies and governance processes...), Portfolio Name (Integrated Performance Management System (IPMS)), Portfolio Description (IPMS is a comprehensive system designed to support the processes of planning, monitoring, evaluation, and reporting, thus enhancing the overall efficiency and effectiveness of the educational workforce.), and Status (Active). A 'Update Portfolio' button is at the bottom.

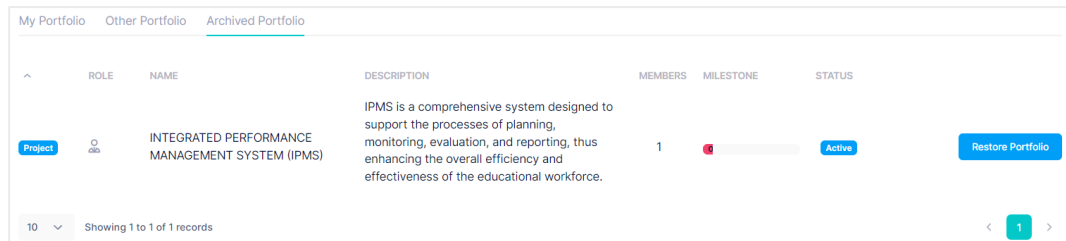
13. To save your edits, click the “**Update Portfolio**” button. Please note that all required fields must be filled in to successfully update the portfolio.

14. To archive your portfolio, locate the “**Actions**” button on the middle right side of the page. Hover over it and choose “**Archive**” from the menu. Confirm your selection when prompted. If there are any tasks still in progress within the portfolio, an alert will appear. Otherwise, the portfolio will be archived successfully.

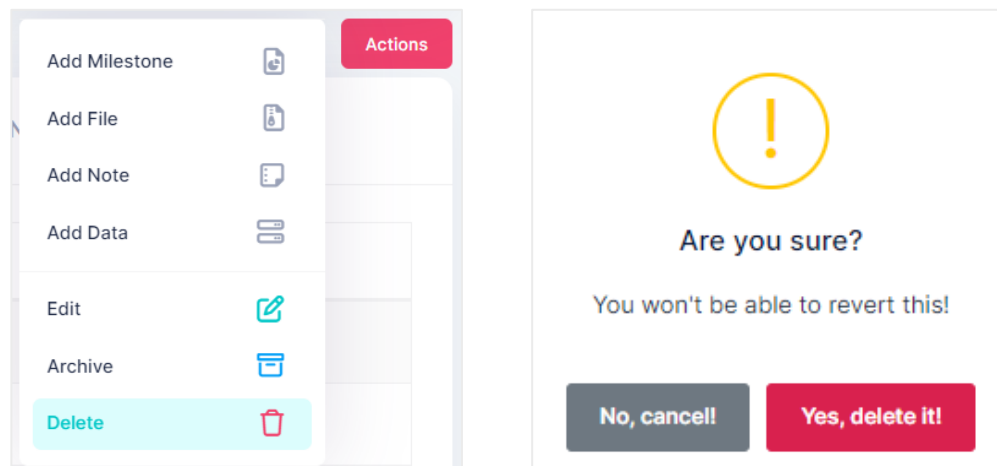


**Note to user:** You can successfully archive a portfolio only if there are no tasks in progress within that portfolio.

- To restore a previously archived portfolio, navigate to the Portfolio Page, find the 'Archived Portfolio' table. Locate the portfolio you need to restore and click the "**Restore Portfolio**" button.



- To delete your portfolio, the option is also available from the "**Actions**" button. Then select the "**Delete**" button.

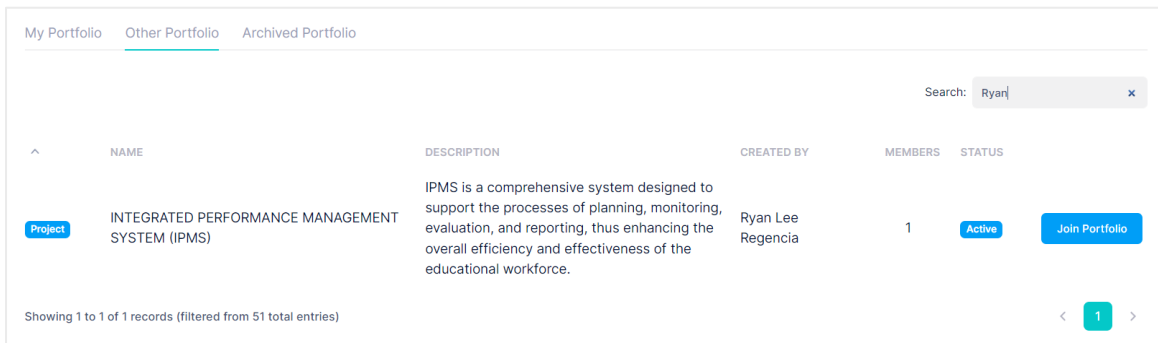


**Note to user:** You can only delete a portfolio if there are no members joined to it.

**Notes to user:** Portfolios are created and managed in alignment with the approved Division Educational Development Plan (DEDP) or Work and Financial Plans (WFP), serving as a crucial mechanism for validating progress toward achieving the Intermediate Outcomes specified in the DEDP.

It's recommended that the process owner, program, or project manager initiates the portfolio creation process and invites members to join. Additionally, you can click on the "Other Portfolio" tab to review and join any specific portfolios that have already been created.

## Joining a Portfolio

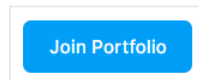


	NAME	DESCRIPTION	CREATED BY	MEMBERS	STATUS	
<b>Project</b>	INTEGRATED PERFORMANCE MANAGEMENT SYSTEM (IPMS)	IPMS is a comprehensive system designed to support the processes of planning, monitoring, evaluation, and reporting, thus enhancing the overall efficiency and effectiveness of the educational workforce.	Ryan Lee Regencia	1	<b>Active</b>	<b>Join Portfolio</b>

Showing 1 to 1 of 1 records (filtered from 51 total entries)

Participating in a Portfolio using IPMS offers the opportunity to collaborate, pool resources, synchronize activities, enhance decision-making, and foster valuable learning experiences alongside fellow personnel. To join a portfolio, simply follow the established guidelines and procedures for your assigned role.

1. Navigate to the Portfolio page, and then select the “**Other Portfolio**” tab.
2. Locate the desired Portfolio, and click the “**Join Portfolio**” button.



3. A pop-up will appear on the screen.

**Portfolio Summary** [X]

**Portfolio Name:**  
Integrated Performance Management System (IPMS)

**Description:**  
IPMS is a comprehensive system designed to support the processes of planning, monitoring, evaluation, and reporting, thus enhancing the overall efficiency and effectiveness of the educational workforce.

**Members:**  
1

**Permissions:**

Allow members to view <b>tasks</b>	YES
Allow members to view shared <b>files</b>	YES
Allow members to view <b>notes</b>	YES
Allow members to send and receive <b>feedbacks</b>	YES

Cancel **Join Portfolio**

- To join, click the “**Join Portfolio**” button.
- The “**Join Portfolio**” button will transition to “*Pending Approval*” status once clicked, indicating that your request to join the portfolio has been submitted and is awaiting approval from the portfolio owner. This status denotes that the portfolio owner needs to review and accept your request before you can gain access to the portfolio's content and resources.

**Pending Approval**

**Note to user:** As the portfolio owner, you have full control over all aspects of the portfolio. However, if you are a participant, your access and capabilities depend on the permissions set by the owner.

## Viewing Your Portfolio

The screenshot displays the 'Portfolio' view for a project named 'Integrated Performance Management System (IPMS)'. The interface includes a header with the portfolio name, a breadcrumb trail 'Home / Portfolio', and an 'Add' button. Below the header, there is a description of the IPMS system. Two summary boxes show the creation date 'May 13, 2024' and the number of tasks '0'. A navigation bar contains tabs for 'MEMBERS', 'MILESTONES', 'TASKS', 'FILES', 'NOTES', 'EVENTS', and 'FEEDBACK'. An 'Actions' button is located in the top right of the main content area. Below the navigation bar is a table with columns for 'NAME', 'NUMBER OF TASKS', 'COMPLETION RATE', and 'COMPLETION TIME'. The table lists two members: Maria Cilar Frogosa and Ryan Lee Regencia, both with 0 tasks and 'Not yet available' completion times. A pagination bar at the bottom shows 'Showing 1 to 2 of 2 records' and a page indicator '1'.

The Portfolio View provides access to the following details:

**Integrated Performance Management System (IPMS)** Project Active  
IPMS is a comprehensive system designed to support the processes of planning, monitoring, evaluation, and reporting, thus enhancing the overall efficiency and effectiveness of the educational workforce.

The portfolio name, status, type, and description.

**May 13, 2024**  
Date Created

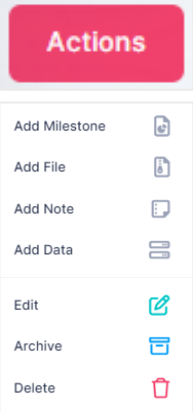

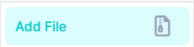

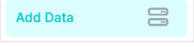
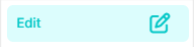


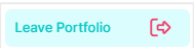
The date when you created your portfolio.

**0**  
All Tasks

The number of tasks under that portfolio.

## Portfolio View Toolbar

The Portfolio View toolbar features a single element, the **“Actions”** button, which serves as a dropdown menu. This menu includes various options such as adding milestones, files, notes, and data, as well as editing, archiving, leaving, and deleting the portfolio. These options offer users a range of functionalities to effectively manage and customize their portfolios according to their needs.

	Button	Function	Condition
		A pop-up window will appear with fields to enter information for a new milestone.	Complete all required fields.
		A pop-up window will display fields required for uploading a file.	Complete all required fields.
		A pop-up window will appear, providing fields to add a new note.	Complete all required fields.
		A pop-up window will emerge, presenting relevant data for establishing connections.	None
		A pop-up window will appear on the right side of the screen.	This section is accessible exclusively to the Portfolio Owner.
		An alert will pop up requesting confirmation to archive the item.	Ensure there are no tasks in progress within this portfolio.
		Pressing this button will permanently delete the Portfolio, making it inaccessible and removing it from view.	This functionality is restricted to the Portfolio Owner. Additionally, a portfolio can only be deleted if no members are currently joined.
		Clicking this button will revoke the member's access to the Portfolio.	This content is exclusively visible to members who have joined the portfolio and are not the owner.

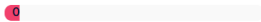

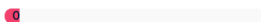
**Note to user:**

*Edit and Delete: Only the owner can see and use these buttons to modify or remove portfolio.*

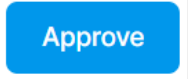
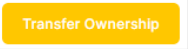
*Leave Portfolio: Only members can see this button, allowing them to voluntarily exit the portfolio when needed.*

## Viewing Portfolio Members

This table offers a comprehensive view of all individuals who have recently joined the portfolio. Each row in the table corresponds to an individual member and displays their relevant details.

MEMBERS				MILESTONES	TASKS ▾	FILES ▾	NOTES ▾	EVENTS	FEEDBACK
NAME ^	NUMBER OF TASKS	COMPLETION RATE	COMPLETION TIME						
Kimberly Edge de Guzman	0		Not yet available						
Ryan Lee Regencia	0		Not yet available						

10 ▾ Showing 1 to 2 of 2 records < 1 >

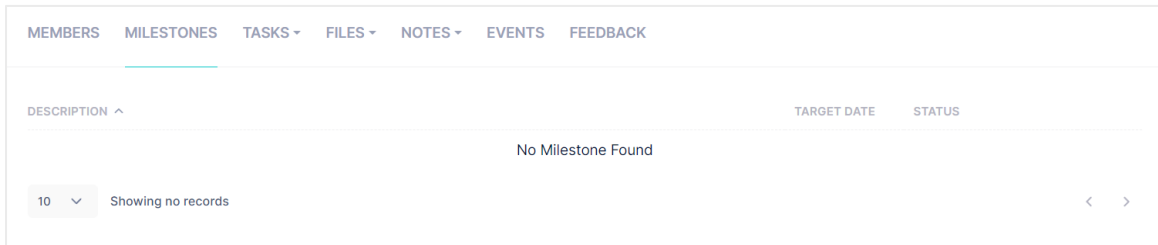
Button	Function
	<p><i>Approve</i></p> <p><b>Purpose:</b> This button is used to confirm or validate the membership of the individual in the portfolio.</p> <p><b>How to Use:</b> To approve a member, simply click on the 'Approve' button located in their corresponding row. Once clicked, the member's status will be updated to reflect their approved status.</p>
	<p><i>Transfer Ownership</i></p> <p><b>Purpose:</b> This button allows you to transfer the ownership rights of certain portfolio elements from one member to another.</p> <p><b>How to Use:</b> To transfer ownership, click the 'Transfer Ownership' button in the row of the member you need to assign new ownership rights to. Follow the prompts to select which elements of the portfolio are to be transferred and to whom.</p>

**Note to user:** The 'Approve' and 'Transfer Ownership' buttons are exclusively visible to the owner of the portfolio. This ensures that only individuals with the appropriate level of authority can make significant changes.

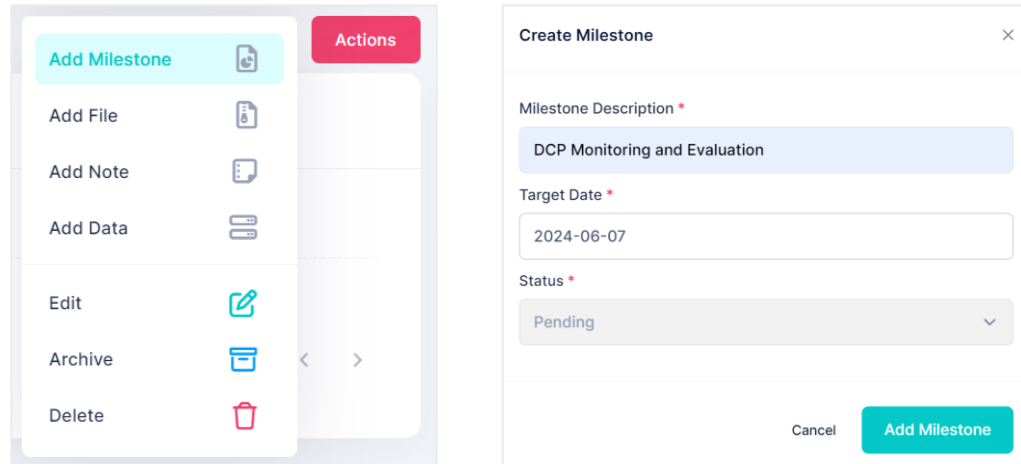
Please be aware that actions performed using the 'Approve' and 'Transfer Ownership' buttons are typically irreversible. Exercise caution and confirm all details are correct before proceeding with these actions.

## Managing Portfolio Milestones

The **Milestones** tab offers a comprehensive overview of all milestones contributed by portfolio members. Acting as a centralized repository, it facilitates the tracking of progress and achievements within the portfolio.



1. To add a milestone, hover over the **“Actions”** and select **“Add Milestone”**. A pop-up will appear.



2. Fill in the **Milestone Description** of the milestone.

Milestone Description \*

DCP Monitoring and Evaluation

3. Specify the **Target Date** for achieving the milestone.

Target Date \*

2024-06-07

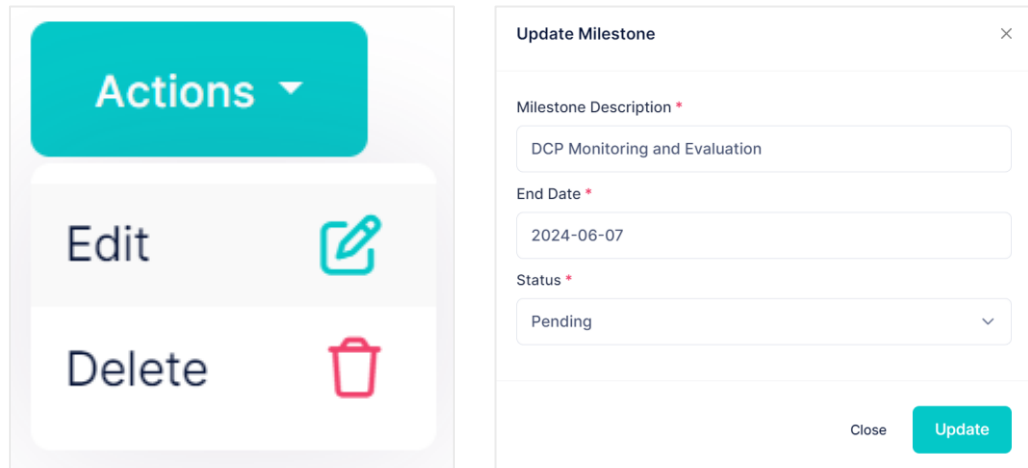
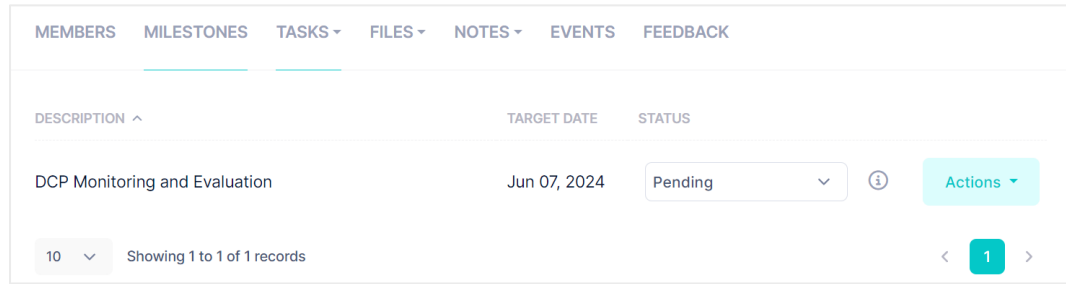
4. **Status** for the milestone is *pending* by default.

Status \*

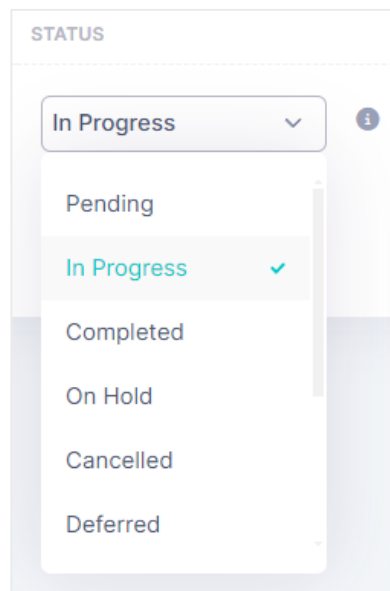
Pending

5. Once you are finished, click on the **“Add Milestone”** button.

- To edit the milestone, click the “**Edit**” (✎) button located inside the “**Actions**” button. A pop-up window will appear.



- Click “**Update**”.
- To edit only the status, click on the dropdown button associated with the status field.

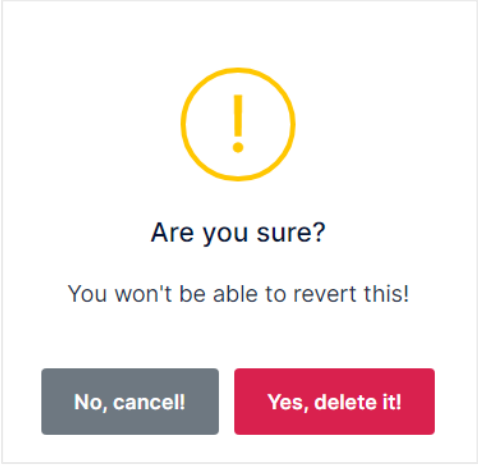
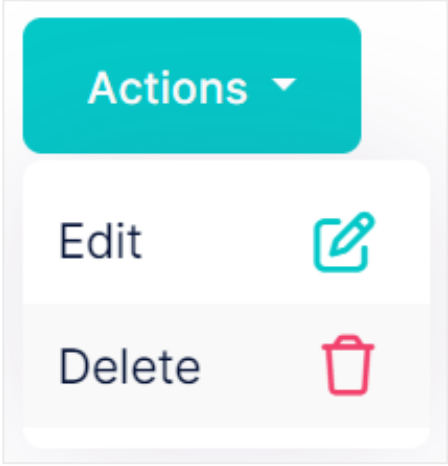


Option	Definition
<i>Pending</i>	The activity has not yet started or is awaiting initiation.
<i>In Progress</i>	The activity is currently ongoing or actively being worked on.
<i>Completed</i>	The activity has been finished or accomplished.
<i>On Hold</i>	The activity has been temporarily suspended or delayed.
<i>Cancelled</i>	The activity has been terminated or called off before completion.
<i>Deferred</i>	The activity has been postponed to a later time or date.
<i>Bumped Off</i>	The activity has been removed or replaced from the schedule or list.

<i>Rescheduled</i>	The activity has been moved to a different date or time.
<i>Delayed</i>	The activity has been pushed back beyond its scheduled start time.
<i>Rejected</i>	The activity was not approved or accepted.

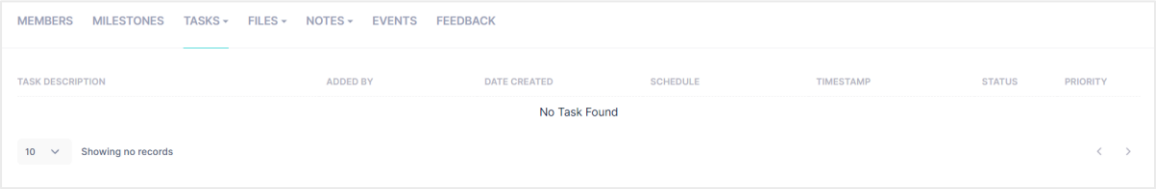
**Note to user:** Hover over the *i* icon to see what the selected status means.

9. To delete, click the “Delete” (🗑️) button and a confirmation dialog will appear.



**Viewing Portfolio Tasks**

The **Tasks** tab in the portfolio features three key dropdown menus: All, My tasks and Others’ task. By navigating these sections, you can effectively manage your tasks while maintaining an overview of the project’s overall progress. The visibility of tasks belonging to other members is contingent upon the permissions granted by the portfolio owner.

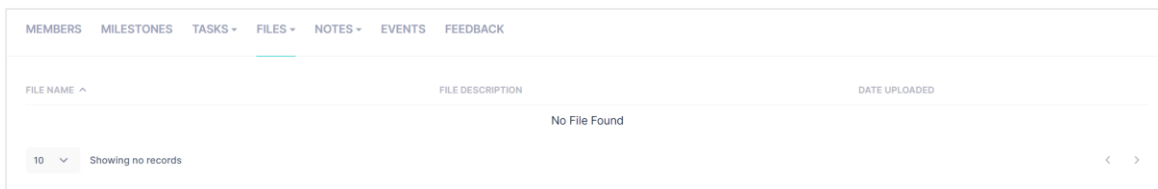


All	This table encompasses both the tasks you've individually added to the portfolio and those contributed by other members.
My tasks	This table includes all the tasks that you have personally added to the portfolio, allowing you to track and manage your own contributions and responsibilities efficiently.

Others task This table displays tasks that have been added by other members of the portfolio. This helps in staying informed about the efforts and progress of other team members, facilitating better collaboration and coordination across the team.

## Managing Portfolio Files

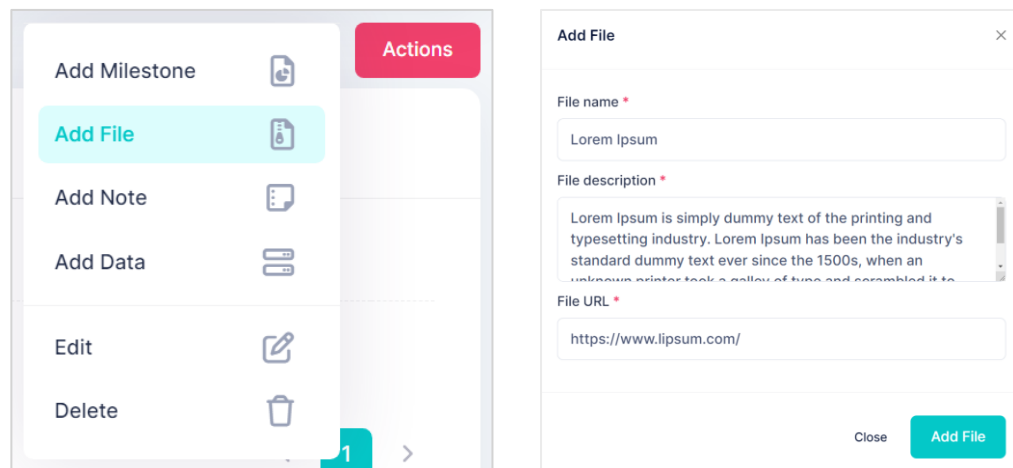
The **Files** tab has My files and Others' file sections for easy file management. Each member sees only their own files, ensuring privacy. Visibility of others' files depends on owner-set permissions. This setup offers control over personal files while allowing access to permitted files, ensuring a secure collaboration environment.



My files This table contains all the files you have added. This section is designed to give you a personal space where you can easily manage and access your own documents. Each file entry comes equipped with an 'Edit' and 'Delete' button inside the Actions button.

Others file This table specifically showcases all the files that have been added by other members. This setup allows you to view and access documents contributed by your teammates, fostering collaboration and ensuring that everyone in the team has visibility into shared resources.

1. To add a file, hover over the “**Actions**” button, then select the “**Add File**” option. A pop-up will appear.



1. Fill in the file name.

File name \*

2. Provide a description for the file.

File description \*

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to

3. Enter the File URL.

File URL \*

4. Click **“Add File”** to save. Note that successful saving requires filling out all the required fields.
5. To edit the file, click the **“Edit”** (✎) button located inside the **“Actions”** button. A pop-up will appear.

MEMBERS	MILESTONES	TASKS ▾	FILES ▾	NOTES ▾	EVENTS	FEEDBACK
FILE NAME ^	FILE DESCRIPTION	DATE UPLOADED				
Lorem Ipsum	Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.	May 13, 2024	Actions ▾			

10 ▾ Showing 1 to 1 of 1 records < 1 >

**Actions ▾**

Edit ✎

Delete 🗑

**Edit File** ✕

File name \*

File description \*

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to

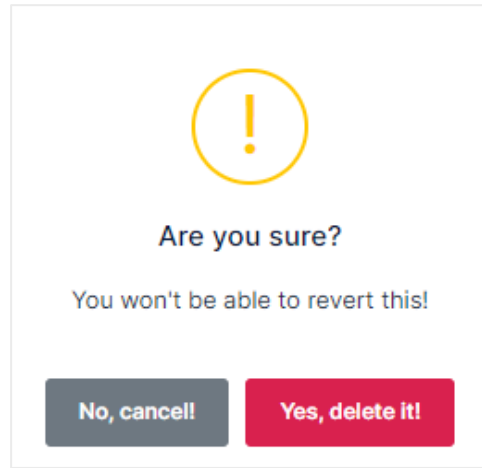
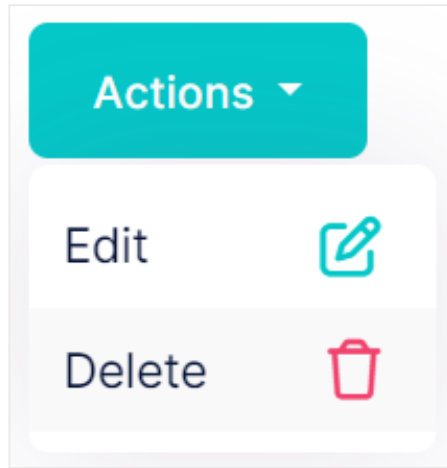
File URL \*

Close **Update**

**Note to user:** Fill up all the required fields to successfully update the file.

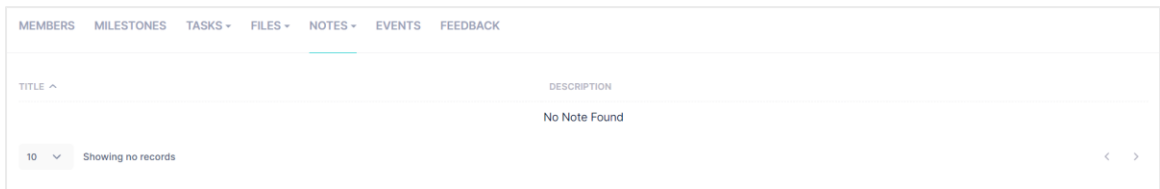
6. Click **“Update”**.

- To delete the file, click the **“Delete”** (🗑️) button. A confirmation will appear.



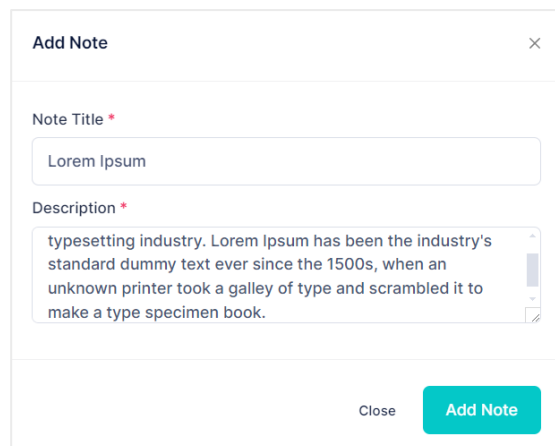
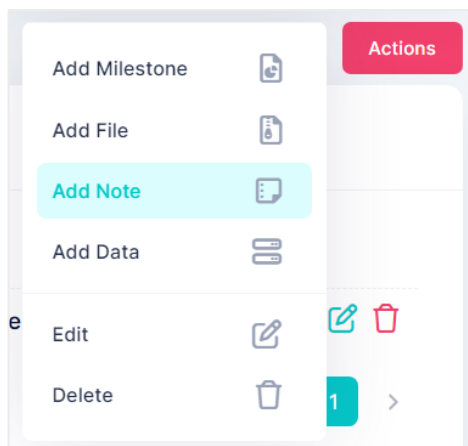
## Managing Portfolio Notes

The **Notes** tab in the portfolio has two dropdown menus: My notes and Others note. This design emphasizes privacy, giving each member control over their personal notes. Colleagues' notes can be accessed based on permissions set by the owner.



My notes	This table This section displays all the notes you have personally added. You can review, edit, and manage your own notes here.
Others note	This table contains entries made by other members of the portfolio. It serves as a collaborative space where everyone can share valuable information.

- To add a note, hover over the **“Actions”** button, then select the **“Add Note”** option. A pop-up will appear.



2. Fill in the note title.

Note Title \*

3. Provide a description for the note.

Description \*

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to

4. Click **“Add Note”**. Note that successful saving requires filling out all the required fields.
5. To edit the note, click the **“Edit”** (✎) button located inside the **“Actions”** button. A pop-up will appear.

TITLE ^	DESCRIPTION	
Lorem Ipsum	Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.	Actions ▾

10 ▾ Showing 1 to 1 of 1 records

< 1 >

Actions ▾

Edit ✎

Delete 🗑

Edit Note

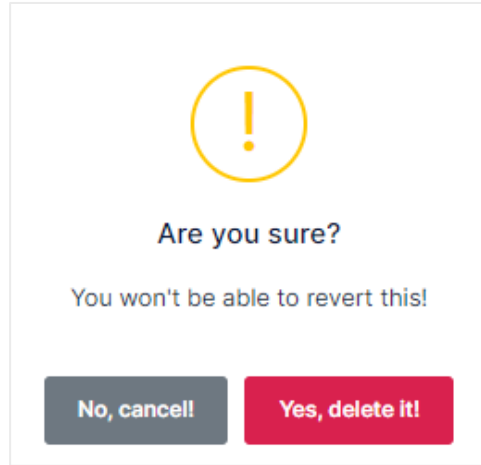
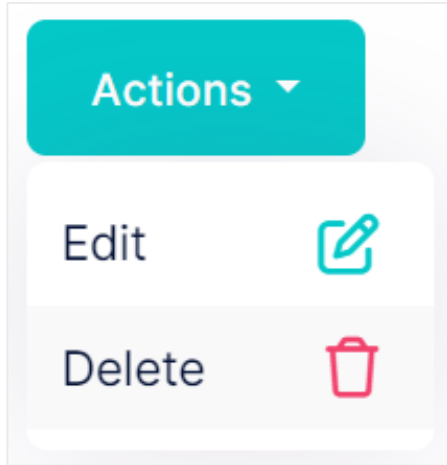
Note Title \*

Description \*

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to

Cancel Update

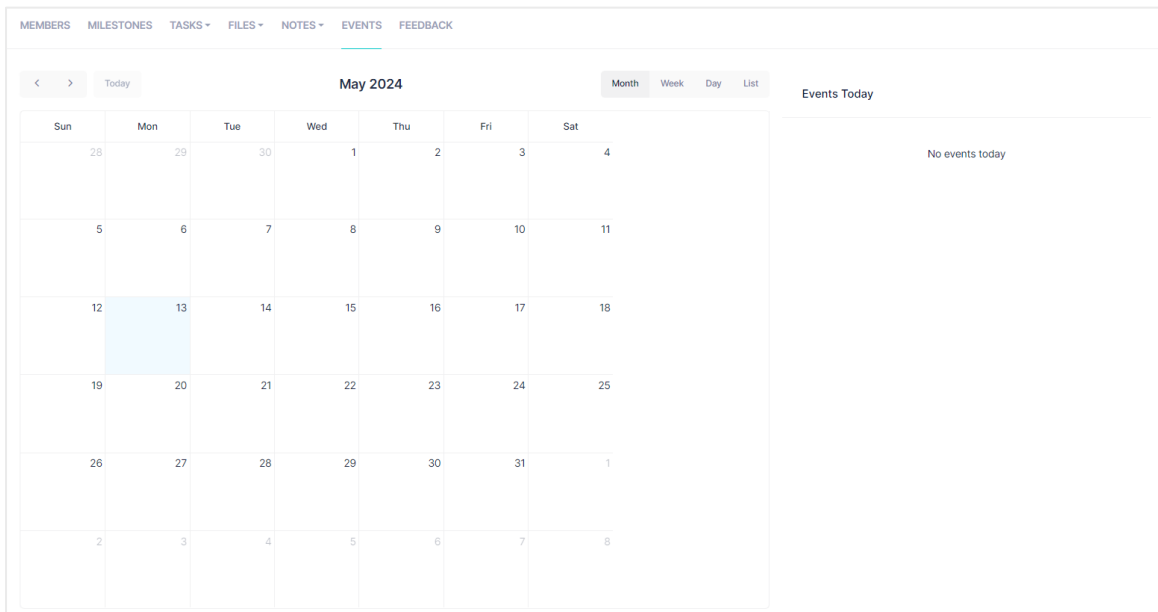
6. Click **“Update”**.
7. To delete the note, click the **“Delete”** (🗑) button. A confirmation will appear.



**Note to user:** Fill up all the required fields to successfully update the file.

### Viewing Portfolio Events

The **Events** tab provides a convenient calendar view of upcoming events within the portfolio. Additionally, it displays a concise list of events scheduled for the current day, offering quick access to pertinent information.



## Sending and Receiving Feedbacks

The **Feedback** tab in the portfolio is designed to facilitate the exchange of feedback and recognition among members. This feature allows you to provide and receive valuable insights and accolades, helping to foster a collaborative and supportive environment within the team.

The screenshot shows the 'FEEDBACK' tab selected in a navigation menu. On the left, there is a list of member names: 'Member Names', 'Ryan Lee Regencia', and 'Kimberly Edge de Guzman'. On the right, a feedback card is displayed. The card is addressed to 'Kimberly Edge de Guzman' and dated 'May 13, 2024 16:01'. The content of the feedback is a paragraph of Lorem Ipsum text. A share icon is visible in the top right corner of the card.

1. To send a feedback or recognition to the member, simply click their name. A pop-up will appear.

The screenshot shows a pop-up form titled 'Share your Feedback'. It has a close button (X) in the top right corner. Under the heading 'Type \*', there are two radio button options: 'Feedback' (which is selected) and 'Recognition'. Below this, there is a text area labeled 'Description \*' containing a paragraph of Lorem Ipsum text. At the bottom of the form, there are two buttons: 'Cancel' and 'Send'.

2. Select the **type** of feedback.

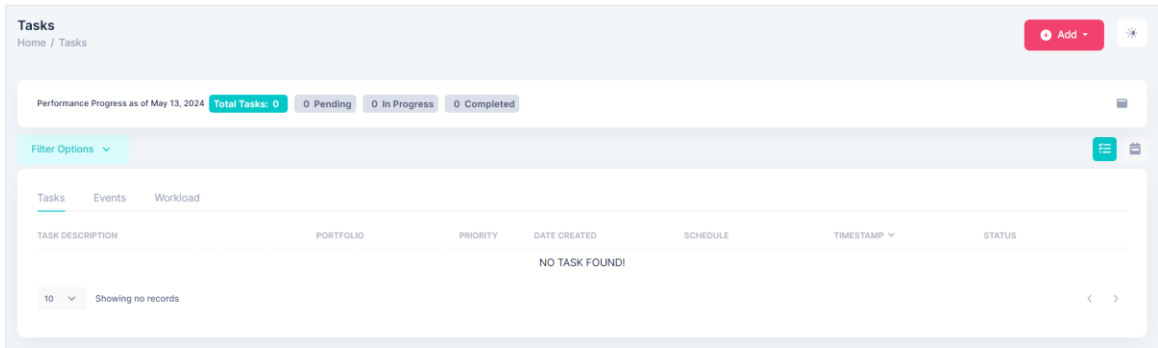
This close-up shows the 'Type \*' section of the form. It features two radio button options: 'Feedback' (selected) and 'Recognition'.

3. Type the **description**.

This close-up shows the 'Description \*' text area of the form. It contains a paragraph of Lorem Ipsum text.

4. Click **“Send”**.

## The Task Management Page



The **Task Management Page** serves as your central hub for effectively managing and organizing tasks. Within this user-friendly interface, you can effortlessly create, assign, and monitor tasks with precision, ensuring no details are overlooked. It's the ideal tool for streamlining your workflow, fostering seamless collaboration, and maintaining control over your to-do list.

### Performance Bar

This tool on your Tasks Page shows important task stats and history. It lets you see pending, in-progress, and completed tasks, along with completion rate and performance over time. It gives you a quick view of your task status, helping you make better decisions about managing and prioritizing tasks.



**Note to user:** Before proceeding to add and schedule tasks and events, it's essential to upload your Performance Targets and manage your portfolio.

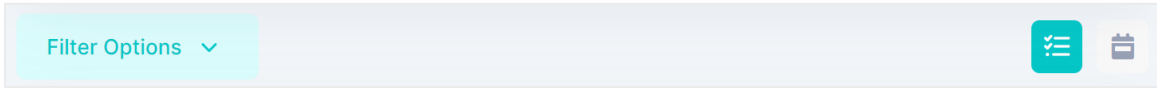
A notification will appear next to the 'Completed' badge, displaying the number of deferred tasks that have not been completed within the scheduled timeframe.

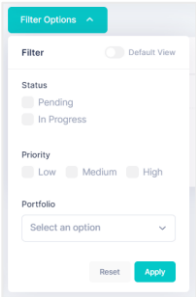


Example:



## Tasks Page Toolbar

This toolbar simplifies the management of tasks, events, and workload pages.



Button	Function
 A screenshot of the 'Filter Options' dialog box. It has a title bar with 'Filter Options' and a dropdown arrow. Below the title bar, there is a 'Filter' section with a 'Default View' toggle. Under 'Status', there are two radio buttons: 'Pending' and 'In Progress'. Under 'Priority', there are three radio buttons: 'Low', 'Medium', and 'High'. Under 'Portfolio', there is a dropdown menu with the text 'Select an option'. At the bottom, there are 'Reset' and 'Apply' buttons.	<p><i>Filter Options</i></p> <p>Purpose: Use this button to personalize task displays with toggles and dropdown menus.</p> <p>How to use:</p> <p><i>Status</i>: Check the boxes for the task statuses you want to view.</p> <p><i>Priority</i>: Choose the priority levels you need to display.</p> <p><i>Portfolio</i>: Select specific portfolios to filter tasks accordingly.</p> <p>After setting your preferences, click “<b>Apply</b>”.</p> <p><i>Default View</i>: Toggle to set the applied filter as your default view, ensuring it appears every time you visit the Tasks page.</p>
 A teal square icon containing a white list with a checkmark.	<p><i>Tasks List</i></p> <p>This button provides access to the Tasks, Events, and Workload sections.</p>
 A teal square icon containing a white calendar.	<p><i>Events Calendar</i></p> <p>This button presents your events in both calendar and list formats.</p>

## Tasks List

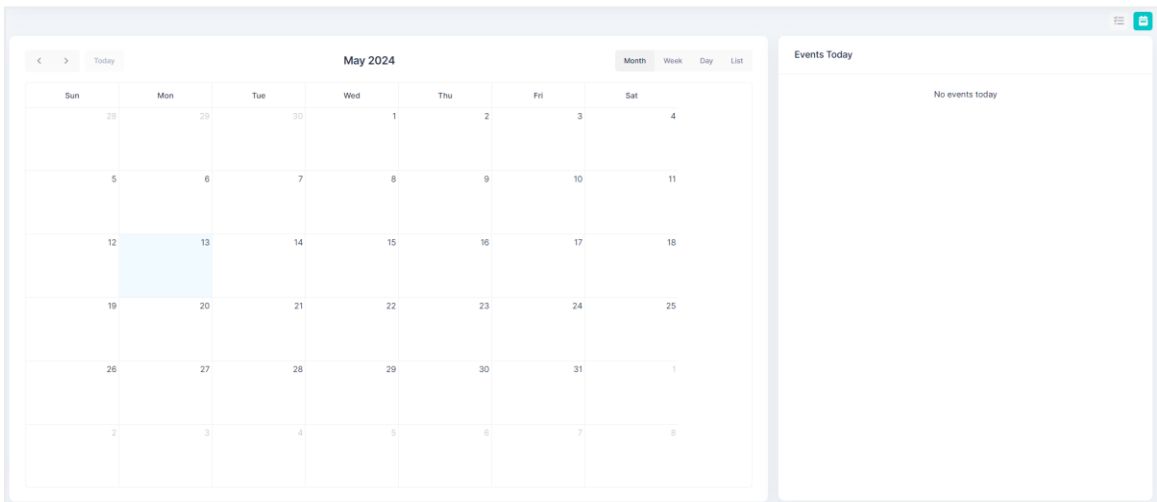
Filter Options

Tasks Events Workload

TASK DESCRIPTION	PORTFOLIO	PRIORITY	DATE CREATED	SCHEDULE	TIMESTAMP	STATUS
NO TASK FOUND!						

10 Showing no records

## Events Calendar



## Adding and Scheduling Tasks

Tasks

Home / Tasks

Completion Rate: 0.00%

Average Completion Time: 00:00:00

Time Format (H:I:S)

Performance as of May 13, 2024

Completed Workloads

Filter Options

Tasks Events Workload

TASK DESCRIPTION	PORTFOLIO	PRIORITY	DATE CREATED	SCHEDULE	TIME
NO TASK FOUND!					

10 Showing no records

### Create Task

Set as Adhoc Task

Portfolio Name \*

Task Description \*

Output \*

Priority \* Status \*

Low Pending

Record as Completed Task

#### Schedule Task

Start Date End Date

Start Time End Time

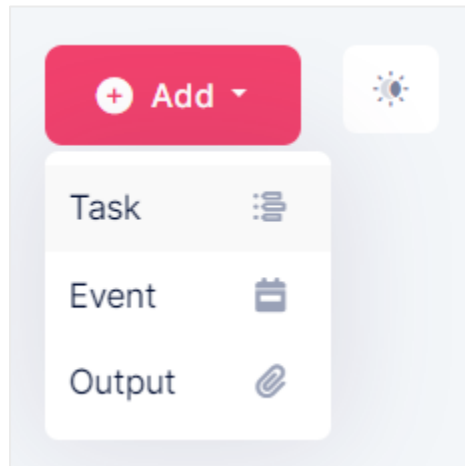
#### Additional Information (Optional)

Assign Members

Portfolio Tags (Optional) (Max: 5)

Save Task Reset

1. On the right side of the site header, locate and click the “**Add**” button. From the dropdown menu, select the “**Add Task**” button. This action will prompt a left panel to appear.



2. Toggle only the **Set as Add-on Task** if the task arises in the course of day-to-day work. If toggled, Portfolio Name will be disabled, Priority will be set to high, and Status will be in Progress.

3. Select the **Portfolio Name** the task corresponds to.

4. Type in the **Task Description**.

**Start your Task Description with a verb.** A task is a defined piece of work or activity with a clear objective, timeline, and output.

*Examples:*

1. Prepare a presentation for the unit meeting on Monday.
2. Write a report on Catchment Area research findings by Friday.

5. Set the **Priority** level, with 'Low' being the default setting. Additionally, the **Status** of the task is automatically set to 'Pending' and this option is disabled by default, meaning it cannot be changed during this initial setup.

Priority \*      Status \*

Low      Pending

- To schedule a task, add the **Start Date**, **End Date**, **Start Time**, and **End Time**.

**Schedule Task**

Start Date      End Date

Pick a date      Pick a date

Start Time      End Time

Pick a time      Pick a time

- If the recorded task occurred before today’s date, toggle the **Record as Completed Task** to enable the use of past dates. Start Date, Start Time, End Date, and End Time are required.

Record as Completed Task

**Schedule Task**

Start Date \*      End Date \*

Pick a date      Pick a date

Start Time \*      End Time \*

Pick a time      Pick a time

**Note to user:** Please be aware that the admins are responsible for deciding the available past dates.

- In the 'Additional Information' section, you will find the Assign Members feature. Here, you can assign tasks to members within your selected portfolio, and those tasks will also appear on their Task Management Page.

Assign Members

- Type in the portfolio tags.

Portfolio Tags (Optional) (Max: 5)

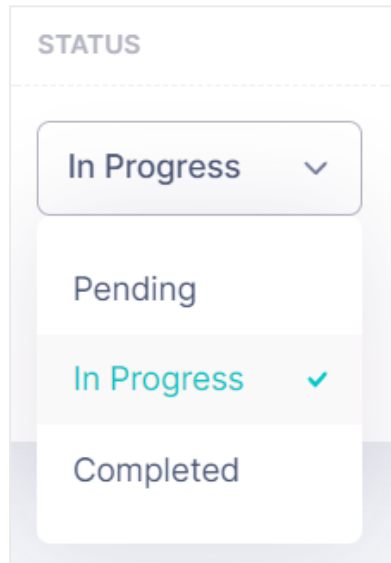
- To save your changes, simply click the **“Save Task”** button. Once clicked, the Tasks table will reload to display the newly added task.

## Updating the Task Status

TASK DESCRIPTION	PORTFOLIO	PRIORITY	DATE CREATED	SCHEDULE	TIMESTAMP	STATUS
Excluded: Entries from past members in the feedback tab.	INTEGRATED PERFORMANCE MANAGEMENT SYSTEM (IPMS)	High	May 06, 2024 - 8:55 AM		May 06, 2024 - 8:55 AM	Pending
Revised: IPMS Manual due to additional changes.	INTEGRATED PERFORMANCE MANAGEMENT SYSTEM (IPMS)	High	May 06, 2024 - 8:36 AM		May 06, 2024 - 8:46 AM	In Progress
Revised: IPMS PPT due to additional changes.	INTEGRATED PERFORMANCE MANAGEMENT SYSTEM (IPMS)	High	May 06, 2024 - 9:21 AM			Pending

10 Showing 1 to 3 of 3 records

1. Navigate to the Task Management page and identify the specific task you need to update.
2. When a task is initially created, its status is automatically set to 'Pending'.
3. To start working on the task, update its status to 'In Progress' by selecting this option from the status dropdown menu or appropriate control.



**Note to user:** When you mark a task as 'In Progress', two key changes happen:

*Edit and Delete Disabled:* Editing and deleting the task are disabled to maintain workflow and data integrity while the task is active.

*Duration Tracking:* The system starts tracking the task's duration from the moment it's marked as "In Progress." This ensures accurate monitoring of task time, essential for performance analysis and project management.

To effectively manage task priorities when shifting focus, follow these steps:

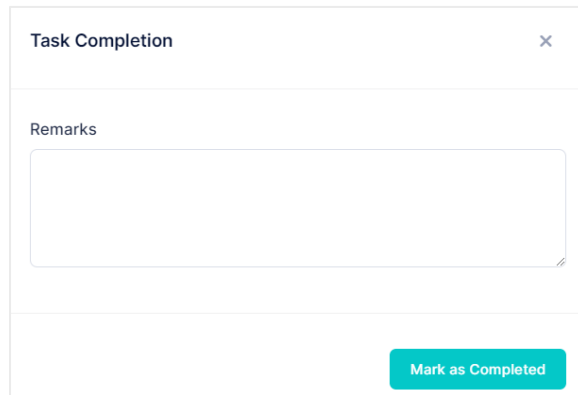
*Pause Current Task:* Change the task in progress to 'Pending' to halt its duration tracking and put it on hold.

*Activate New Task: Set the task you need to prioritize to 'In Progress' to start tracking its duration, allowing full concentration.*

*Manage Progress: This process preserves the progress of the 'Pending' task without adding time. It enables efficient management of multiple tasks while focusing on the most important ones.*

*By using this method, you can adjust task priorities dynamically while maintaining accurate time records for each task.*

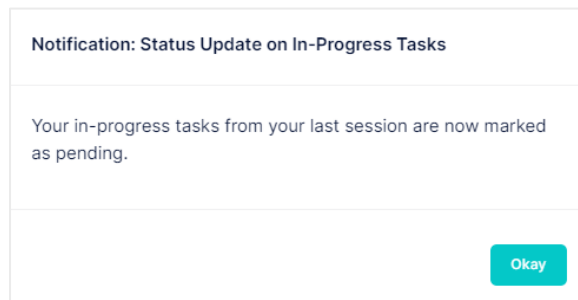
4. Once the task is finished, set its status to 'Completed'. A pop up will appear, allowing you to provide additional information. However, you can proceed immediately by clicking the **“Mark as Completed”** button.



The image shows a 'Task Completion' pop-up window. It has a title bar with 'Task Completion' and a close button (X). Below the title bar is a section labeled 'Remarks' with a large, empty text input area. At the bottom right of the window is a teal button labeled 'Mark as Completed'.

**Note to user:** *Once a task is mark as 'Completed', it cannot be reverted back. It will only be in the Task Completed pop-up from this point forward.*

5. If a task is left in progress overnight, a modal will appear upon signing in the next day, indicating that the in-progress task has been set back to pending. The time duration for the task will stop at 6:00 PM of the previous day.



The image shows a notification modal titled 'Notification: Status Update on In-Progress Tasks'. The main text reads: 'Your in-progress tasks from your last session are now marked as pending.' At the bottom right is a teal button labeled 'Okay'.

6. When “Okay’ is clicked, you will be redirected to the Tasks Management Page.

## Managing Assigned Task

For assigned tasks, the task creator can monitor the progress of the assigned member. While both have the same task, each maintains a separate record. For tasks assigned to a member, the edit and delete buttons will be disabled.

TASK DESCRIPTION	PORTFOLIO	PRIORITY	DATE CREATED	SCHEDULE	TIMESTAMP	STATUS
Lorem Ipsum	INTEGRATED PERFORMANCE MANAGEMENT SYSTEM (IPMS)	Low	May 13, 2024 - 4:17 PM	May 13, 2024 - 1:00 PM May 13, 2024 - 5:00 PM		Pending
Lorem Ipsum 2	INTEGRATED PERFORMANCE MANAGEMENT SYSTEM (IPMS)	Low	May 13, 2024 - 4:21 PM	May 14, 2024 - 8:00 AM May 14, 2024 - 12:00 PM		Pending

### For Task Creator

The tag icon next to the task description is clickable. Once clicked, a pop-up will open, displaying the records of the assigned members in a table format.

MEMBER	TASK DESCRIPTION	PORTFOLIO	PRIORITY	DATE CREATED
Kimberly Edge de Guzman	Lorem Ipsum 2	INTEGRATED PERFORMANCE MANAGEMENT SYSTEM (IPMS)	Low	May 13, 2024 - 4:2

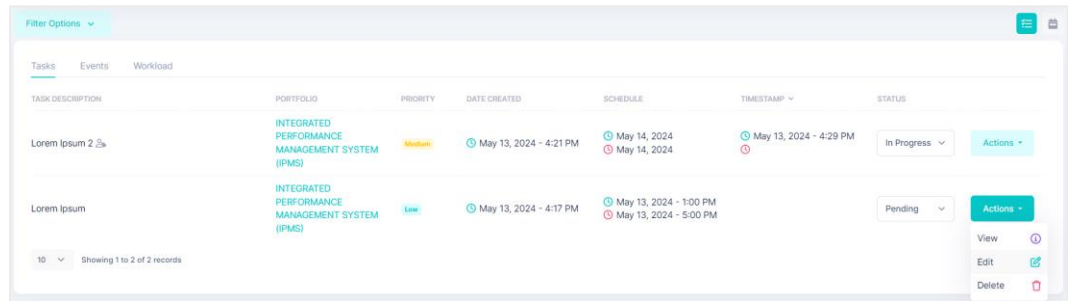
### For Assigned Member

The tag icon next to the task description is colored yellow to indicate that the task has been assigned to the user.

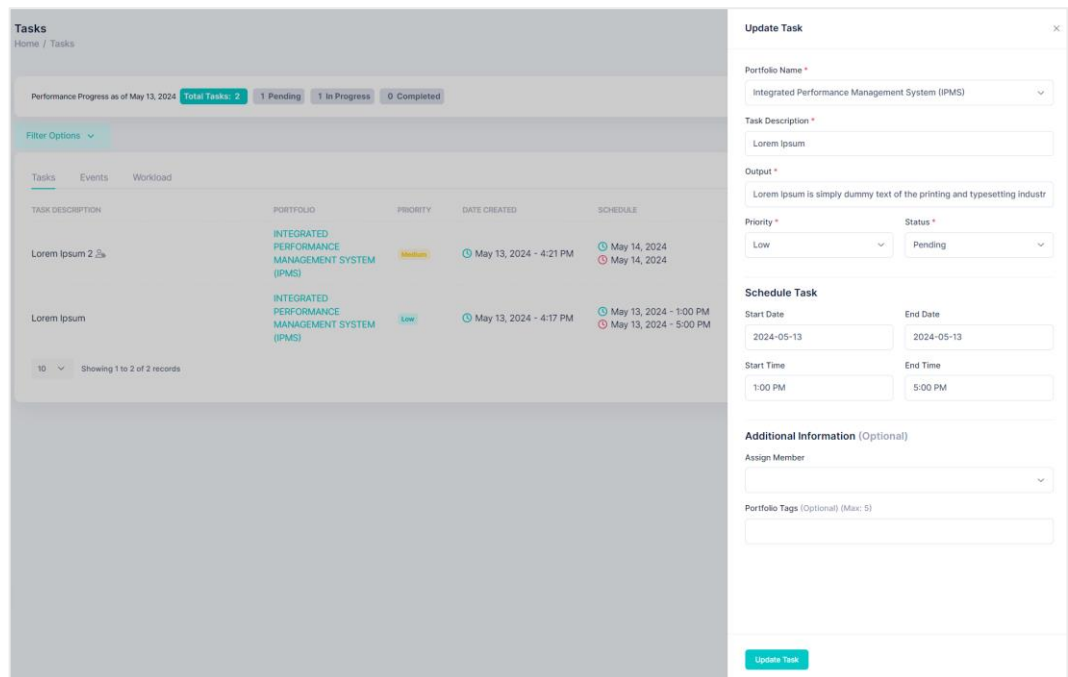
TASK DESCRIPTION	PORTFOLIO	PRIORITY	DATE CREATED	SCHEDULE	TIMESTAMP	STATUS
Lorem Ipsum 2	INTEGRATED PERFORMANCE MANAGEMENT SYSTEM (IPMS)	Low	May 30, 2024 - 1:56 PM	May 30, 2024 - 8:00 AM May 30, 2024 - 12:00 PM		Pending

## Editing or Deleting a Task

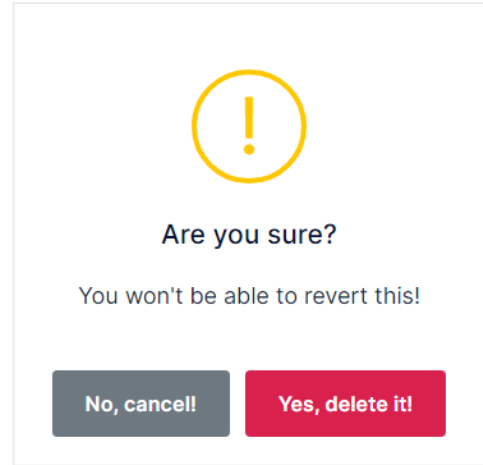
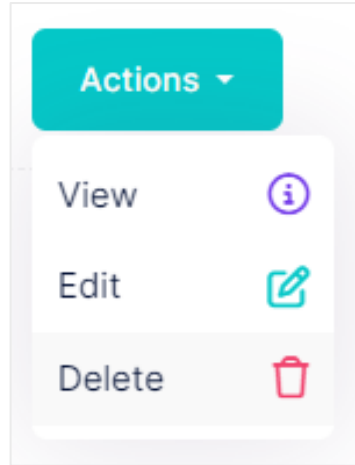
1. First, navigate to the Task Management page, specifically the Tasks tab, and locate the task you need to modify or remove.



2. To edit a task, first ensure that its status is set to 'Pending', as only tasks in this status are eligible for modifications. Then, click on the **Edit** button within the **“Actions”** button. This action will open the editing panel.



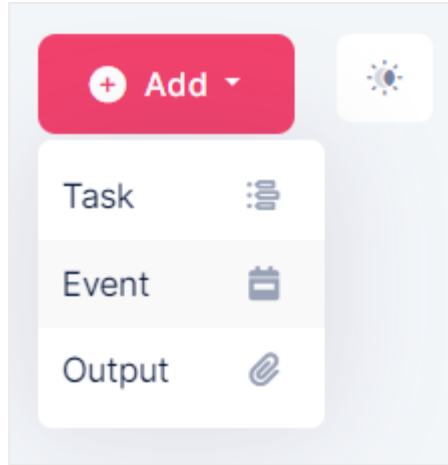
3. After making the necessary changes, click the **“Update Task”** button to save the edits. Make sure to fill up all the required fields.
4. If you need to delete the task, also click on the **Delete** (🗑️) button within the **“Actions”** button. A prompt will appear on the screen asking you to confirm the deletion.



**Note to user:** Please be aware that you can only edit or delete a task that is not currently In Progress.

## Adding and Scheduling Event

1. Click on the “**Add Event**” button located on the right side of the site header, triggering a panel to appear from the right side of the screen.



2. Choose the **Portfolio Name** only if the event matches the portfolio.

Portfolio Name

Select an option

3. Select the **Event Type**.

Event Type \*

Select an option

4. Type the **Event Title** into the designated field.

Event Title \*

Enter the title

5. On default, the Event Status is Pending.

Status \*

Pending

6. Proceed to schedule the event by setting the **From Date, Start Time, To Date,** and **End Time**.

From Date *	To Date *
Pick a date	Pick a date
Start Time *	End Time *
Pick a time	Pick a time

7. Choose the event's location: Offsite (Specify location) or Onsite, as needed.

**Location \***

OFFSITE  ONSITE

8. Set your **role** for the event using the provided options.

**Event Role \***

Select an option

9. If known, enter the **organizer's information** into the designated field.

**Organizer**

Enter the organizer

10. Utilize the provided text area to input any additional details or information relevant to the event.

11. To save your changes, simply click the **“Save Event”** button. Once clicked, the Events table will reload to display the newly added event.

## Editing or Deleting an Event

1. First, navigate to the Task Management page, specifically the Events tab, and locate the event you need to modify or remove.

LOCATION	TYPE	EVENT TITLE	PORTFOLIO	DATE	YOUR ROLE	ORGANIZER	
		ICT Upskilling and EPMMO/DECODER Pilot Implementation	INTEGRATED PERFORMANCE MANAGEMENT SYSTEM (IPMS)	May 13, 2024 - 8:00 AM May 13, 2024 - 5:00 PM	Facilitator	ICTU	<b>Actions</b> Edit Delete

2. Click on the **Edit** (✎) button inside the “**Actions**” button; this will open the editing panel.

**Tasks**  
Home / Tasks

Performance Progress as of June 04, 2024 **Total Tasks: 3** 3 Pending 0 In Progress 0 Completed

Filter Options

Tasks Events Workload

LOCATION	TYPE	EVENT TITLE	PORTFOLIO	DATE	YOUR ROLE	ORGANIZER
		ICT Upskilling and EPMMO/DECODER Pilot Implementation	INTEGRATED PERFORMANCE MANAGEMENT SYSTEM (IPMS)	Jun 04, 2024 - 8:00 AM Jun 04, 2024 - 5:00 PM	Facilitator	ICTU

Showing 1 to 1 of 1 records

**Edit Event**

Portfolio Name  
Integrated Performance Management System...

Event Type \*  
Select an option

Event Title \*  
ICT Upskilling and EPMMO/DECODER Pilot Implementation

Status \*  
Pending

From Date \*  
2024-06-04

To Date \*  
2024-06-04

Start Time \*  
8:00 AM

End Time \*  
5:00 PM

Location \*  
 OFFSITE  ONSITE

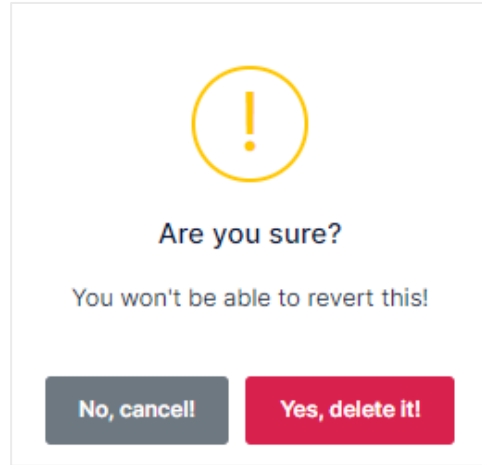
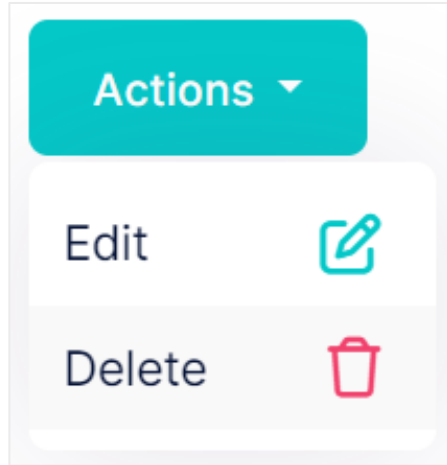
Event Role \*  
Facilitator

Other Details (Optional)

Organizer  
ICTU


Update Event

3. After making the necessary adjustments, click on the “**Update Event**” button to save the changes. Make sure you filled up all the required fields.
4. If you need to delete the event, also click on the **Delete** (🗑) button within the “**Actions**” button. A prompt will appear on the screen asking you to confirm the deletion.



**Note to user:** When scheduling tasks and events, you will receive a warning if the timing overlaps with another scheduled task or event. However, it's just a notification to inform you.

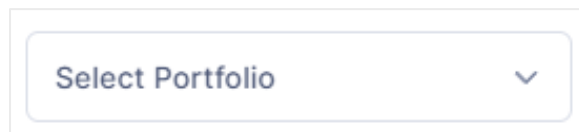
## Managing Workload

TRACKING NO. ^	STATUS	ORIGIN	TYPE	DESCRIPTION	REMARKS	PORTFOLIO	ACTION
ISS-240269	Assigned	Records	Issuance	RM No 009 s. 2024 Submission of Information Materials (IMs) on the Upcoming Events and Conducted Programs, Projects and Activities (PPAs)		Select Portfolio	

10 Showing 1 to 1 of 1 records

The **Workload** tab is designed to help you manage and complete workload assigned to you through the Document Tracking System (DTS). Follow these steps to efficiently update and track the status of your tasks:

1. To begin working on a specific workload, first select the corresponding portfolio from the list. This action will enable the “**Action**” button, signaling that the workload is ready to be updated.



2. Once the “**Action**” button is active, click on it to mark the workload as completed in the Workload tab.



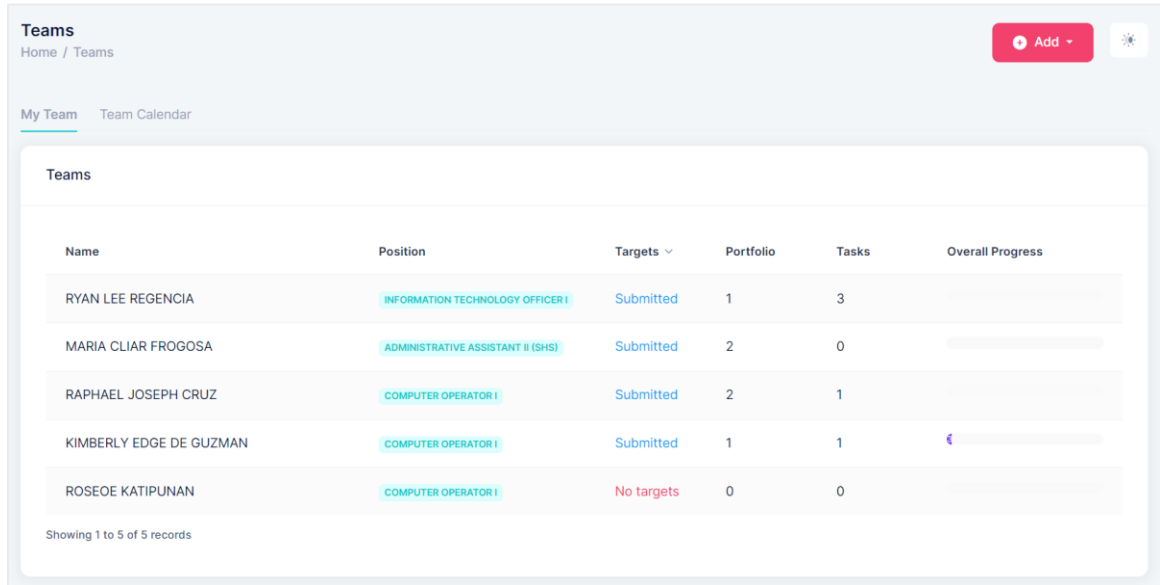
3. To finalize the completion of the task, you must also update its status in the Document Tracking System (DTS). Ensure that you follow the required steps in the DTS to officially complete the task.

## The Teams Management Page

The **Teams Management Page** is a central hub for department users, with options for unit heads and team members. Unit heads oversee productivity, while team members stay informed about department activities. This promotes clarity, transparency, collaboration, and efficiency.

Teams are displayed and arranged in tabs:

### My Team



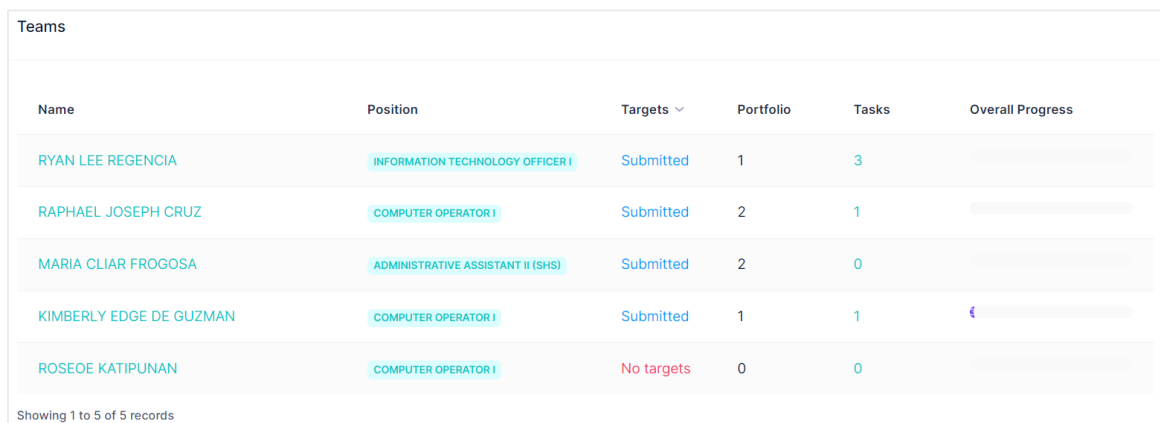
Name	Position	Targets	Portfolio	Tasks	Overall Progress
RYAN LEE REGENCIA	INFORMATION TECHNOLOGY OFFICER I	Submitted	1	3	<div style="width: 100%;"></div>
MARIA CLIAR FROGOSA	ADMINISTRATIVE ASSISTANT II (SHS)	Submitted	2	0	<div style="width: 0%;"></div>
RAPHAEL JOSEPH CRUZ	COMPUTER OPERATOR I	Submitted	2	1	<div style="width: 100%;"></div>
KIMBERLY EDGE DE GUZMAN	COMPUTER OPERATOR I	Submitted	1	1	<div style="width: 100%;"></div>
ROSEOE KATIPUNAN	COMPUTER OPERATOR I	No targets	0	0	<div style="width: 0%;"></div>

Showing 1 to 5 of 5 records

This tab shows the members in your department along with their name, position, targets, portfolio, tasks, and overall progress.

### For Unit Heads

**Note to user:** Please be aware that only unit heads have access to the feature where they can click on the names, targets, and tasks of users within their department to monitor their subordinates.



Name	Position	Targets	Portfolio	Tasks	Overall Progress
RYAN LEE REGENCIA	INFORMATION TECHNOLOGY OFFICER I	Submitted	1	3	<div style="width: 100%;"></div>
RAPHAEL JOSEPH CRUZ	COMPUTER OPERATOR I	Submitted	2	1	<div style="width: 100%;"></div>
MARIA CLIAR FROGOSA	ADMINISTRATIVE ASSISTANT II (SHS)	Submitted	2	0	<div style="width: 0%;"></div>
KIMBERLY EDGE DE GUZMAN	COMPUTER OPERATOR I	Submitted	1	1	<div style="width: 100%;"></div>
ROSEOE KATIPUNAN	COMPUTER OPERATOR I	No targets	0	0	<div style="width: 0%;"></div>

Showing 1 to 5 of 5 records

## Viewing the Member Preview

Member Preview

Information Performance History Incident Report

Employment Classification ^ Email

Job Order Non-teaching kimberlyedge.deguzman@deped.gov.ph

Showing 1 to 1 of 1 records

Feedback

Recognition

Your Feedback

Send Feedback

To access the Member Preview from the Teams table, follow these simple steps:

1. Navigate to the Teams table and click on the name of the member whose profile you need to view.

KIMBERLY EDGE DE GUZMAN

2. Once you've clicked on the member's name, you will be directed to the Member Preview, which features three distinct tabs:

	<i>Information</i>	This tab provides general information about the member, including employment classification and email.
	<i>Performance History</i>	Here, you can review the member's past performance, including achievements and overall contribution to the team.
	<i>Incident Report</i>	This section contains any incident reports associated with the member, allowing for a review of any issues or notable events.

## Viewing the Targets Submitted

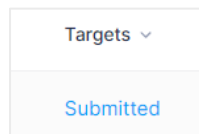
Performance Targets (KIMBERLY EDGE DE GUZMAN) ×

KRA	OBJECTIVES	EXPECTED OUTPUT	%	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
ICT Systems and Management	Maintain 100% availability of backed-up data derived from web-based systems.	Provide one (1) updated database archives.	30	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%
	Achieve 100% completion of test plan and test cases.	Provide Test Plan and Test Case for Integrated Performance Management System (IPMS).	30	0/4 0%	0/4 0%	0/4 0%	0/4 0%	0/4 0%	0/4 0%	0/4 0%	0/4 0%	0/4 0%	0/4 0%	0/4 0%	0/4 0%
	Maintain 100% availability and functionality of the following systems: 1. Integrated Performance Management System (IPMS)	Integrated Performance Management System (IPMS).	40	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%	0/1 0%

Close

To view the Targets submitted by a user, follow these steps:

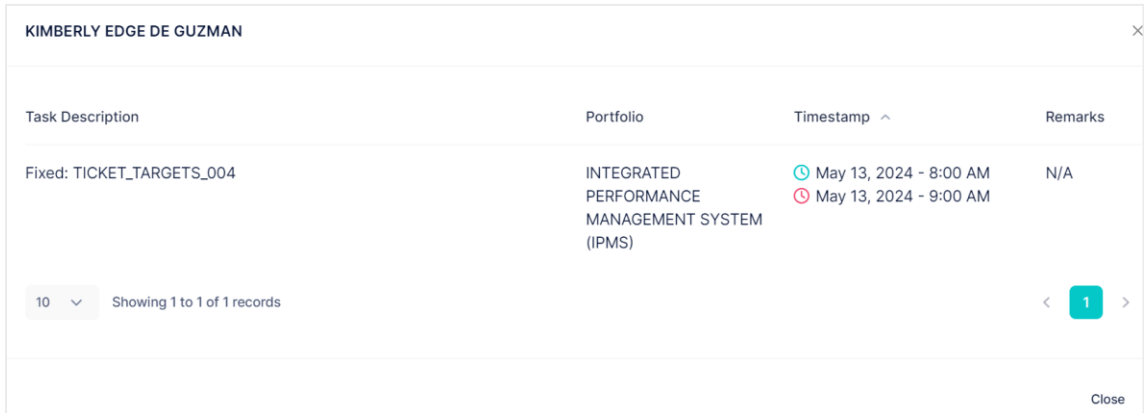
1. On the relevant management or oversight page, locate the column labeled **“Targets”**. Look for the word **“Submitted”** under the Targets column next to the user whose targets you need to view. Click on **“Submitted”** to proceed.



2. Clicking on **“Submitted”** will trigger a full-screen pop-up that mirrors the layout of the targets page typically seen in the member's profile. This display will show all the targets as submitted by the member.

**Note to user:** While this view allows you to see the details of the submitted targets, it does not provide functionality for the unit head to update these targets or link a folder. This is a view-only interface designed to ensure transparency and allow for performance tracking without direct modifications.

## Viewing the Tasks

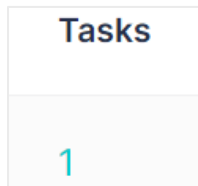


The screenshot shows a user profile for Kimberly Edge de Guzman with a table of tasks. The table has four columns: Task Description, Portfolio, Timestamp, and Remarks. One task is listed with a fixed ID, an integrated performance management system portfolio, and two timestamps. A pagination bar at the bottom shows 'Showing 1 to 1 of 1 records' and a button with the number '1'.

Task Description	Portfolio	Timestamp	Remarks
Fixed: TICKET_TARGETS_004	INTEGRATED PERFORMANCE MANAGEMENT SYSTEM (IPMS)	May 13, 2024 - 8:00 AM May 13, 2024 - 9:00 AM	N/A

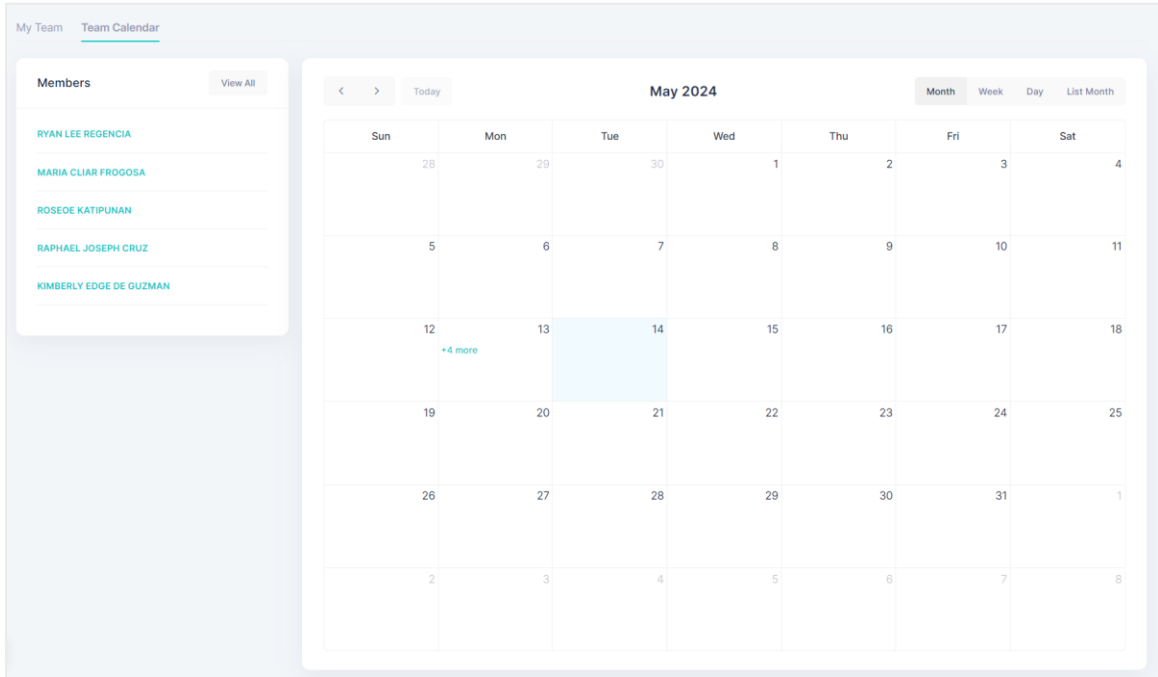
To view the completed tasks of a user, follow these straightforward steps:

1. Locate the column labeled **“Tasks”** on the relevant dashboard or user overview page.



2. Within this column, identify the user whose tasks you need to view and click on the number displayed under the 'Tasks' column. This number typically represents the total count of completed tasks for that specific user.
3. Clicking on this number will provide a detailed view or a list of all tasks that the user has completed, allowing for easy monitoring and review of their performance.

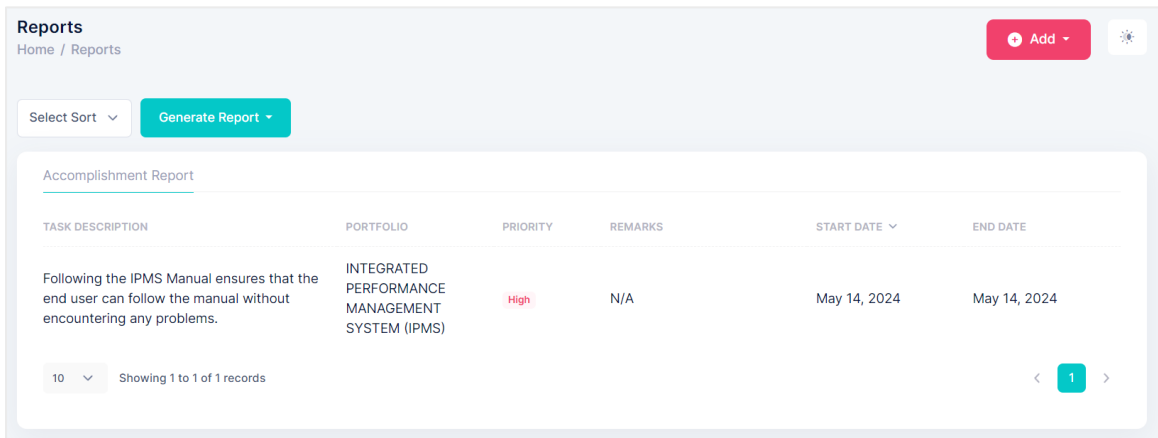
## Teams Calendar



This tab displays the tasks and events of the members within your department in a calendar format.

## The Accomplishment Report Page

The **Accomplishment Report Page** is designed to showcase all of your completed tasks in a table format, offering a comprehensive overview of your achievements. This layout allows you to quickly review the specifics of each task, including completion dates and relevant details, helping you to easily track your progress and evaluate your productivity over a given period. This detailed and organized presentation of accomplishments is an effective tool for reflecting on past activities and planning future objectives.



The "**Generate**" dropdown button on your interface includes two menu options, each catering to different reporting needs:

- **By Date Range** - Choosing this option opens a pop-up where you input start and end dates. It's handy for generating reports within a specific timeframe without linking them to a portfolio.
- **By Portfolio** - This option prompts a pop-up where you select a portfolio. It's for generating reports specific to that portfolio, providing insight into its activities and outputs.

These two options provide flexibility in report generation, allowing you to tailor the information retrieval to meet your specific needs, whether they are time-bound or portfolio-specific.

The screenshot shows a pop-up window titled "Generate by Date Range" with a close button (X) in the top right corner. It contains three input fields: "Print From" (a text box), "Print To" (a text box), and "Print Orientation" (a dropdown menu currently set to "Portrait"). At the bottom, there are two buttons: a grey "Cancel" button and a teal "Generate" button.

#### By Date Range:

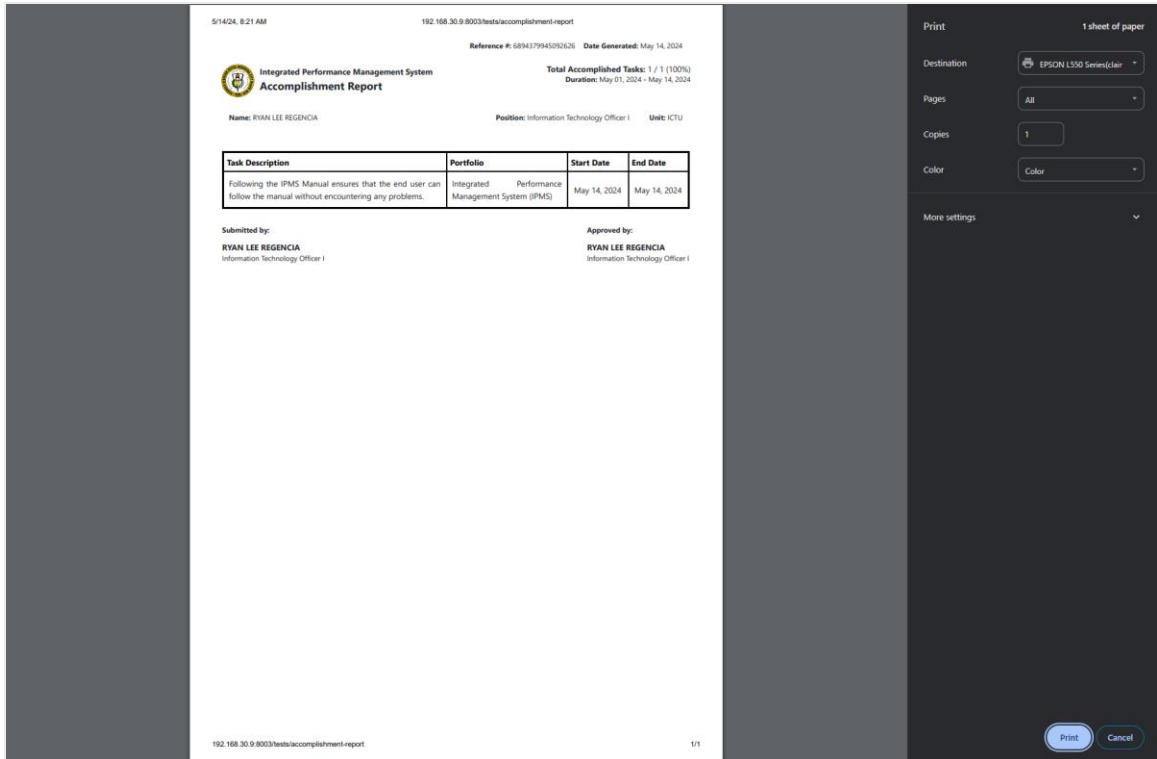
1. Specify the start date for printing.
2. Specify the end date for printing.
3. Specify the orientation.

The screenshot shows a pop-up window titled "Generate by Portfolio" with a close button (X) in the top right corner. It contains four input fields: "Print Portfolio" (a dropdown menu with "Select Portfolio" selected), "Print From" (a text box), "Print To" (a text box), and "Print Orientation" (a dropdown menu currently set to "Portrait"). At the bottom, there are two buttons: a grey "Cancel" button and a teal "Generate" button.

#### By Portfolio

1. Choose a Portfolio.
2. Specify the start date for printing.
3. Specify the end date for printing.
4. Specify the orientation.

When you click "**Generate**" to produce the Accomplishment Report, the system will create a PDF document that encapsulates all relevant data.



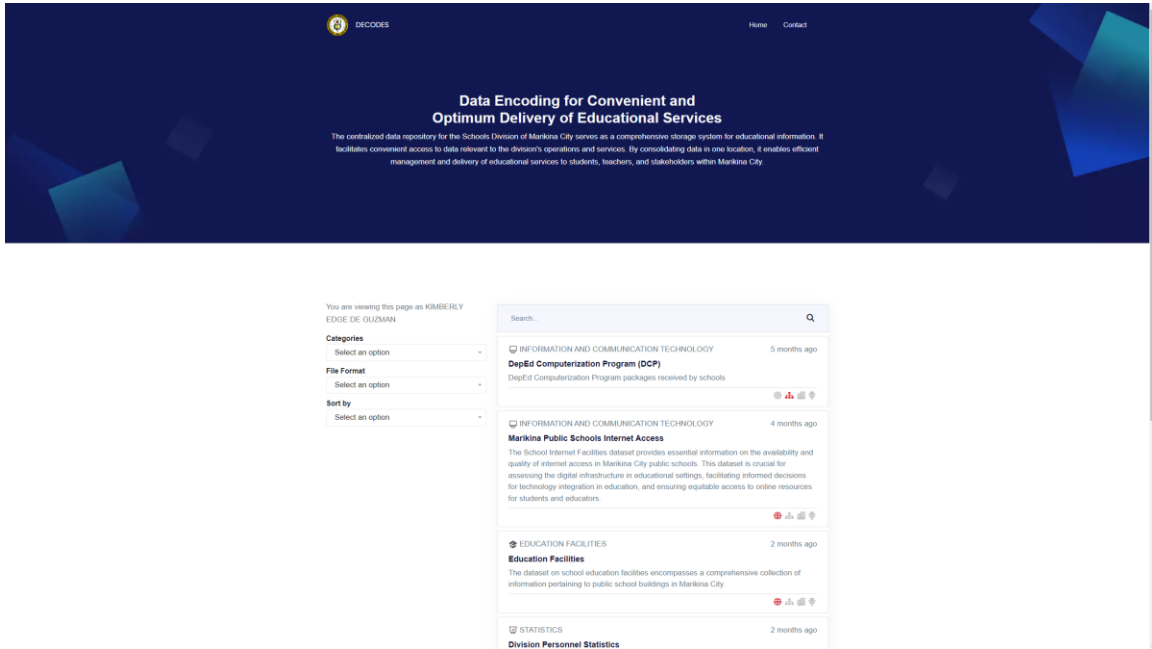
## Signing Out

The **Sign Out** button ends your session, ensuring the security of your account and preserving your privacy by terminating your current session and logging you out of the platform. By clicking Sign Out, you proactively safeguard your personal data and prevent unauthorized access to your account.

1. Navigate to the bottom of the side navigation bar within the system interface to find the **“Sign Out”** (🔒) button. It typically appears as a recognizable icon or text.
2. Once you've located the **“Sign Out”** (🔒) button, click on it to initiate the sign-out process.
3. After clicking the **“Sign Out”** button, you will be automatically redirected to the login page. This ensures the secure termination of your current session, logging you out of the platform and safeguarding your account's security and privacy.

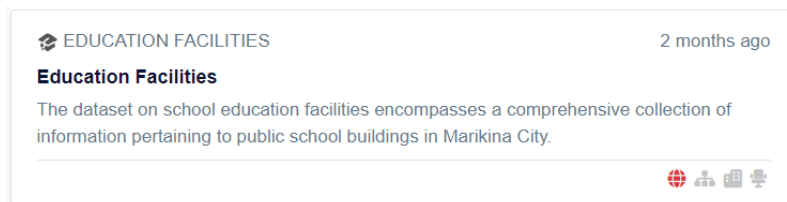
# Data Management System

The **Data Management System** presents all the data relevant to the division's operations and services. The datasets displayed are provided by the administrators, offering comprehensive insights into various aspects of the division's activities.



## Privacy Level

- **Public Access** - This dataset is accessible to all users, whether logged in or not. Anyone can view the dataset without needing to create an account or sign in.







- **Organization Access** - Access to this dataset is restricted to users who are logged in and affiliated with either the Employment Self-Service (ESS) or Integrated Performance Management System (IPMS). Only users within these organizational frameworks can view the dataset.

EDUCATION FACILITIES 2 months ago

**Education Facilities**

The dataset on school education facilities encompasses a comprehensive collection of information pertaining to public school buildings in Marikina City.

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- Station Access** - The dataset is categorized into two stations: employees under the school’s division office and employees under public schools. If the dataset was published by the division office, only logged-in employees of the division can access it. Similarly, if it was published by public schools, only logged-in employees assigned to public schools can view it.

EDUCATION FACILITIES 2 months ago

**Education Facilities**

The dataset on school education facilities encompasses a comprehensive collection of information pertaining to public school buildings in Marikina City.

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- Office/Unit Specific Access** - Access to datasets is limited to the logged-in user's respective office or unit. Users can only view datasets published under their specific office or unit, ensuring data confidentiality and relevance to their work responsibilities.

EDUCATION FACILITIES 2 months ago

**Education Facilities**

The dataset on school education facilities encompasses a comprehensive collection of information pertaining to public school buildings in Marikina City.

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## Viewing the Dataset

The screenshot shows the DECODES website interface. At the top, there is a dark blue header with the DECODES logo on the left and 'Home' and 'Contact' links on the right. Below the header, the main content area is divided into a left sidebar and a main content area. The sidebar, titled 'Other Datasets', lists various categories: DEPED, COMPUTERIZATION PROGRAM (DCP), MARIKINA PUBLIC SCHOOLS, INTERNET ACCESS, EDUCATION FACILITIES, DIVISION PERSONNEL, and STATISTICS. The main content area features the title 'Education Facilities' in bold. Below the title, it shows the author 'Ryan Lee Regencia', 76 Views, and the dataset name 'Education Facilities' with a globe icon and the word 'Public'. A description follows: 'The dataset on school education facilities encompasses a comprehensive collection of information pertaining to public school buildings in Marikina City.' Below this is a section titled 'Access & Use Information' containing two items: 'Public : This dataset is intended for public access and use.' and 'License: No license information was provided.' At the bottom of this section, it states 'No datasets found.' with a horizontal line below it.

1. Locate the title of the dataset you need to explore and click on it.

The screenshot shows a dataset card for 'Education Facilities'. At the top left, there is a globe icon followed by the text 'EDUCATION FACILITIES'. At the top right, it says '2 months ago'. Below this, the title 'Education Facilities' is displayed in blue. The description reads: 'The dataset on school education facilities encompasses a comprehensive collection of information pertaining to public school buildings in Marikina City.' At the bottom right of the card, there are four icons: a globe, a group of people, a building, and a document.

2. After clicking the dataset title, you will be automatically redirected to a new page. This page will display comprehensive details about the dataset, including but not limited to its description, contents, metadata, and any relevant information for users.