

# Departmental Performance Management

This report enables real-time consolidation and management of departmental performance data on the web.

Move beyond the hassle of collecting data in Excel — now manage all performance records in one integrated online view.

Easily consolidate target, actual, variance, and achievement rate data for each department, giving managers instant visibility into overall performance without manual updates.

Use the provided sample Excel file to experience a more efficient way to manage departmental performance.

★ | 🌱 Departmental Performance Management 📄 ▶

## Departmental Performance Report — September, 2025

Year 2025-09 📅 Refresh

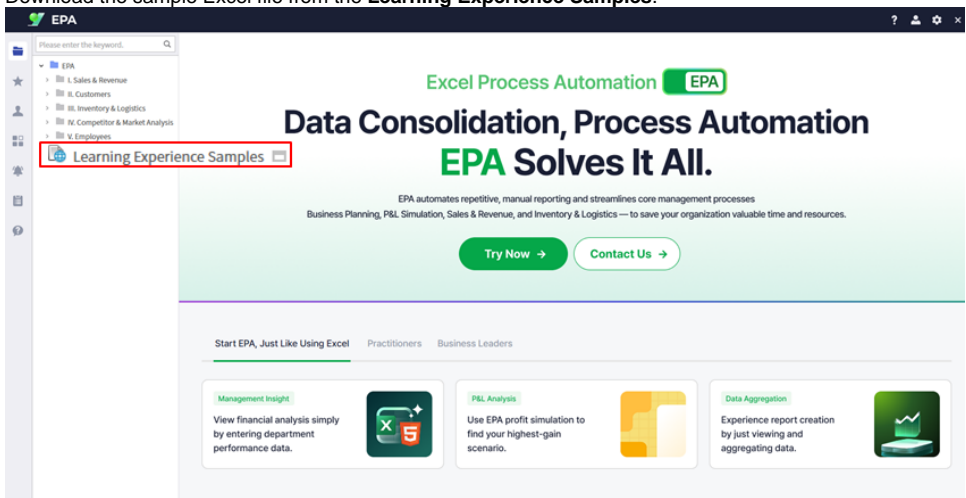
MGMT		HR		ACCT		PROC		TECH	
M Target	<b>910,000</b>	M Target	<b>910,000</b>	M Target	<b>880,000</b>	M Target	<b>990,000</b>	M Target	<b>1,070,0</b>
M Actual	<b>680,000</b>	M Actual	<b>810,000</b>	M Actual	<b>690,000</b>	M Actual	<b>830,000</b>	M Actual	<b>790,0</b>
Variance	<b>230,000</b>	Variance	<b>100,000</b>	Variance	<b>190,000</b>	Variance	<b>160,000</b>	Variance	<b>280,0</b>

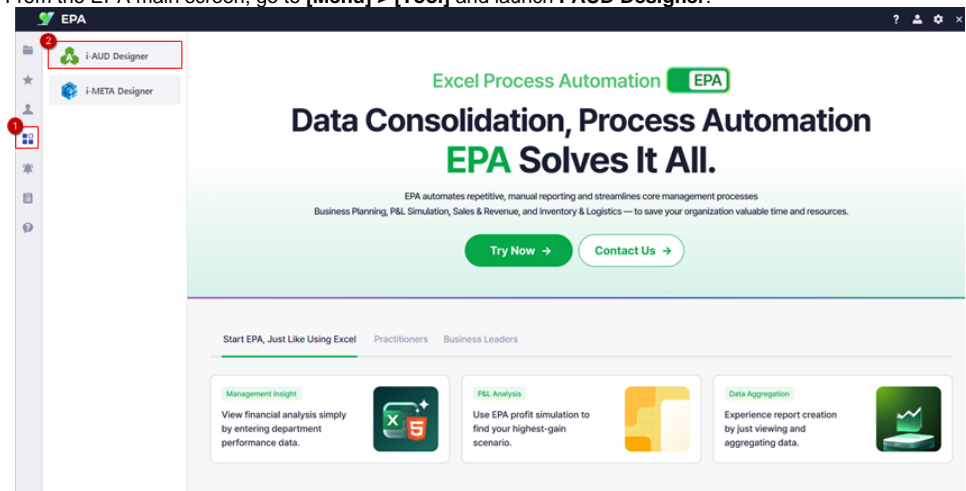
Category	2025-01	2025-02	2025-03	2025-04	2025-05	2025-06	
M G M T	Target	920,000	900,000	920,000	920,000	850,000	3C
	Actual	740,000	890,000	760,000	860,000	660,000	85
	Variance	<b>180,000</b>	<b>10,000</b>	<b>160,000</b>	<b>60,000</b>	<b>190,000</b>	<b>-59</b>
	Rate(Actual/Target)	<b>80%</b>	<b>99%</b>	<b>83%</b>	<b>93%</b>	<b>78%</b>	
H R	Target	1,090,000	980,000	990,000	1,020,000	920,000	1,03
	Actual	840,000	860,000	820,000	720,000	680,000	65
	Variance	<b>250,000</b>	<b>120,000</b>	<b>170,000</b>	<b>300,000</b>	<b>240,000</b>	<b>38</b>
	Rate(Actual/Target)	<b>77%</b>	<b>88%</b>	<b>83%</b>	<b>71%</b>	<b>74%</b>	
A C C T	Target	1,030,000	1,090,000	920,000	970,000	860,000	1,07
	Actual	900,000	830,000	760,000	720,000	840,000	85
	Variance	<b>130,000</b>	<b>260,000</b>	<b>160,000</b>	<b>250,000</b>	<b>20,000</b>	<b>18</b>
	Rate(Actual/Target)	<b>87%</b>	<b>76%</b>	<b>83%</b>	<b>74%</b>	<b>98%</b>	
P R O C	Target	870,000	970,000	850,000	910,000	860,000	85
	Actual	730,000	900,000	820,000	840,000	860,000	78
	Variance	<b>140,000</b>	<b>70,000</b>	<b>30,000</b>	<b>70,000</b>	<b>0</b>	<b>7</b>
	Rate(Actual/Target)	<b>84%</b>	<b>93%</b>	<b>96%</b>	<b>92%</b>	<b>100%</b>	
T E C H	Target	1,080,000	880,000	990,000	1,070,000	1,010,000	97
	Actual	720,000	650,000	700,000	820,000	770,000	88
	Variance	<b>360,000</b>	<b>230,000</b>	<b>290,000</b>	<b>250,000</b>	<b>240,000</b>	<b>9</b>
	Rate(Actual/Target)	<b>67%</b>	<b>74%</b>	<b>71%</b>	<b>77%</b>	<b>76%</b>	

Step 1. Convert an Excel file to a web report using i-AUD Designer

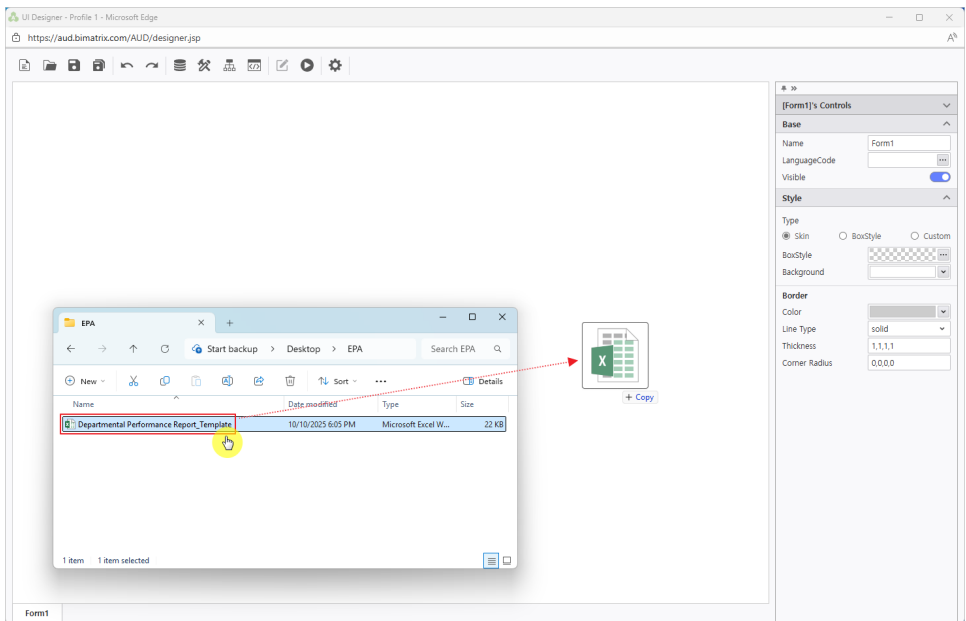
- Download the sample Excel file from the **Learning Experience Samples**.



- From the EPA main screen, go to **[Menu] > [Tool]** and launch **i-AUD Designer**.

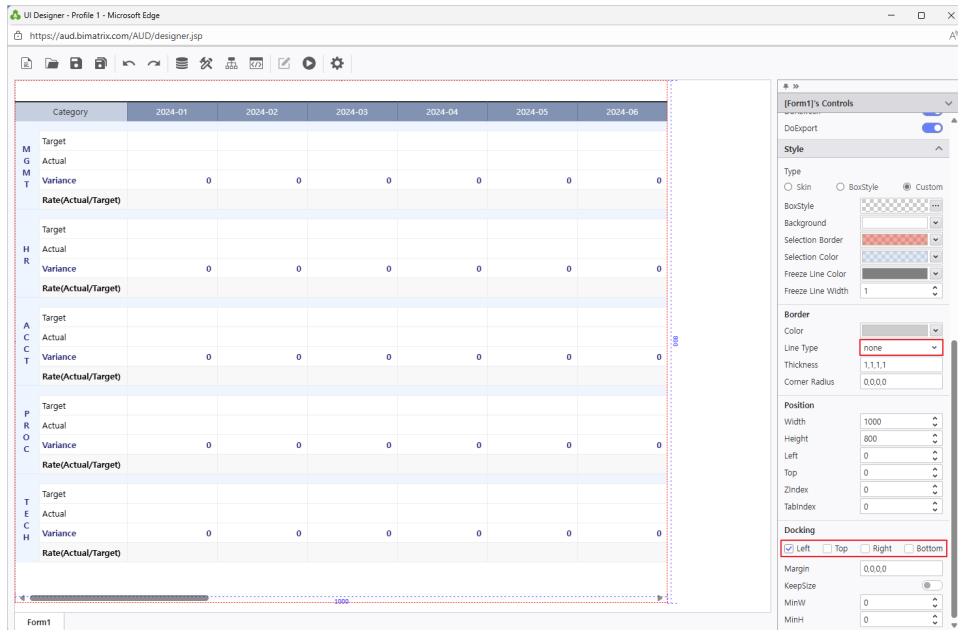


- Drag and drop the saved Excel file into the **i-AUD Designer** window.



- Ensure the report automatically resizes to fit the web browser window.
- In the **Properties pane** on the right, check **Docking: Left**.

- To remove the border from the report on the designer screen, set the **Line Type** property under **Border** to **'None'**.



## Step 2. Configure the data input screen

- Using Excel's **'Name Manager'** and the UI Bot, set up the report so that data can be entered directly on the web.
- Right-click** on the report area, then select **Design**.

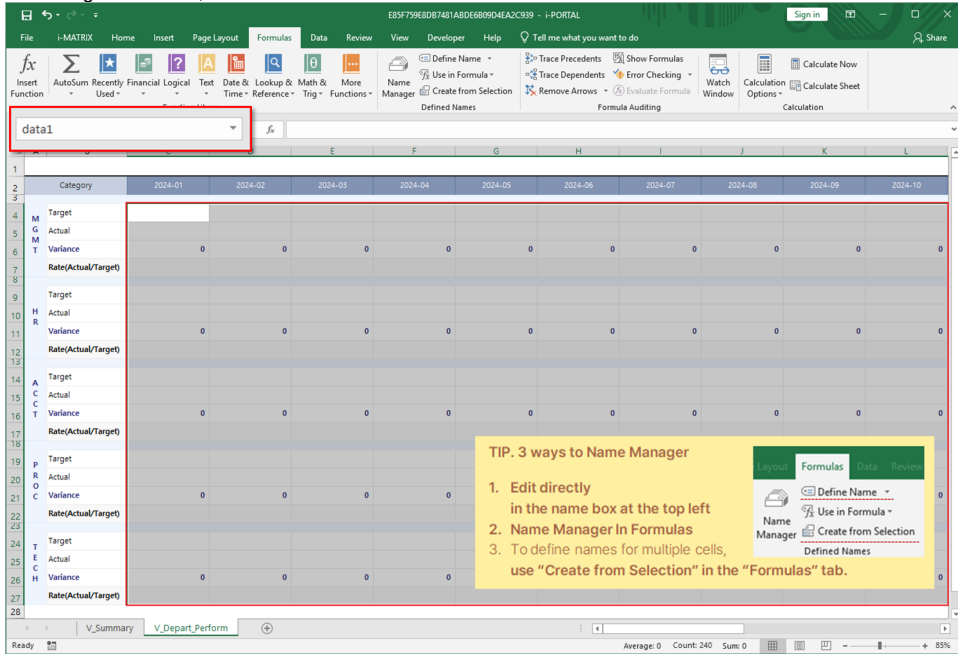
### Naming Rules for the Data Input Screen

To configure the data input screen, you must follow these three rules:

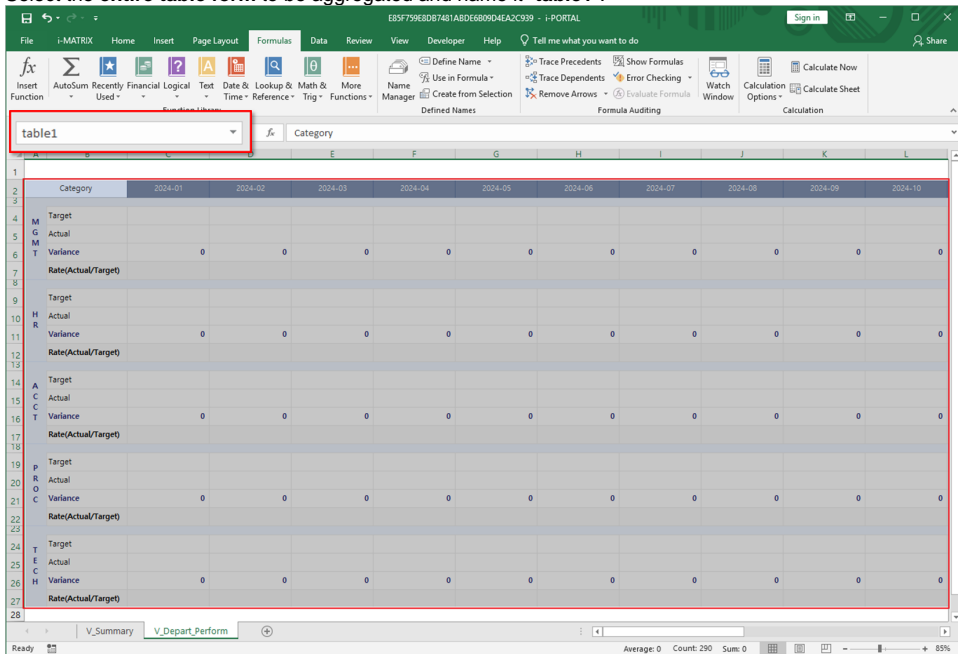
- Name the data entry area **"data1"**.  
Set the cell format to **'Number'** for numeric input and **'Text'** for text input.
- Name the table area to be aggregated **"table1"**.
- In the **top-left corner** of the area defined as **table1**, you must enter the **table name**.

Category	2024-01	2024-02	2024-03	2024-04	2024-05	2024-06
M Target						
M Actual						
M Variance	0	0	0	0	0	0
M Rate(Actual/Target)						
H Target						
H Actual						
H Variance	0	0	0	0	0	0
H Rate(Actual/Target)						
A Target						
A Actual						
A Variance	0	0	0	0	0	0
A Rate(Actual/Target)						
P Target						
P Actual						
P Variance	0	0	0	0	0	0
P Rate(Actual/Target)						
T Target						
T Actual						
T Variance	0	0	0	0	0	0
T Rate(Actual/Target)						

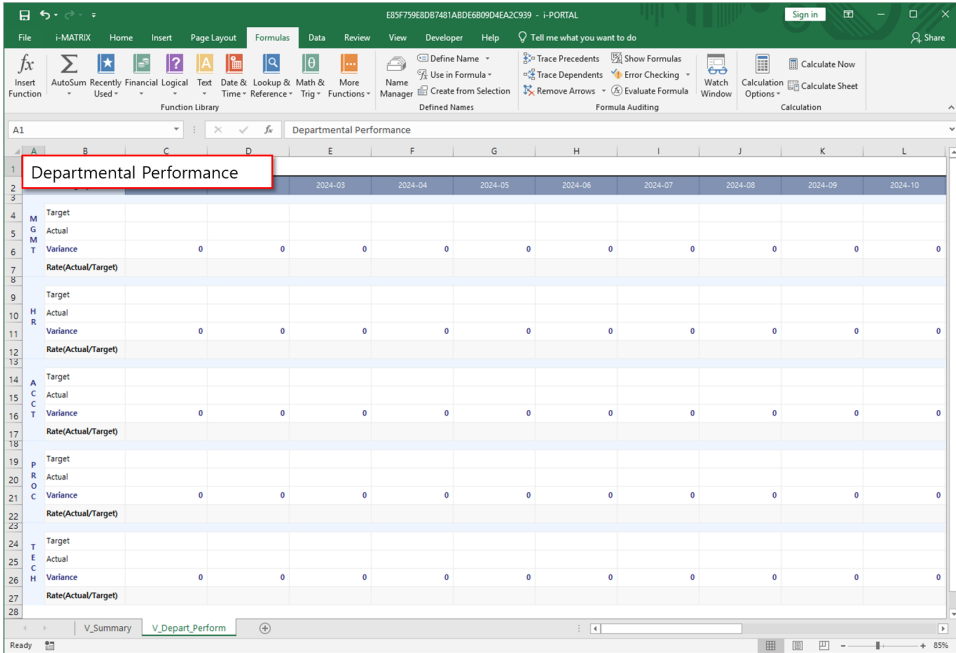
- According to the rules, select the area on the sheet where data will be entered and name it **"data1"**.



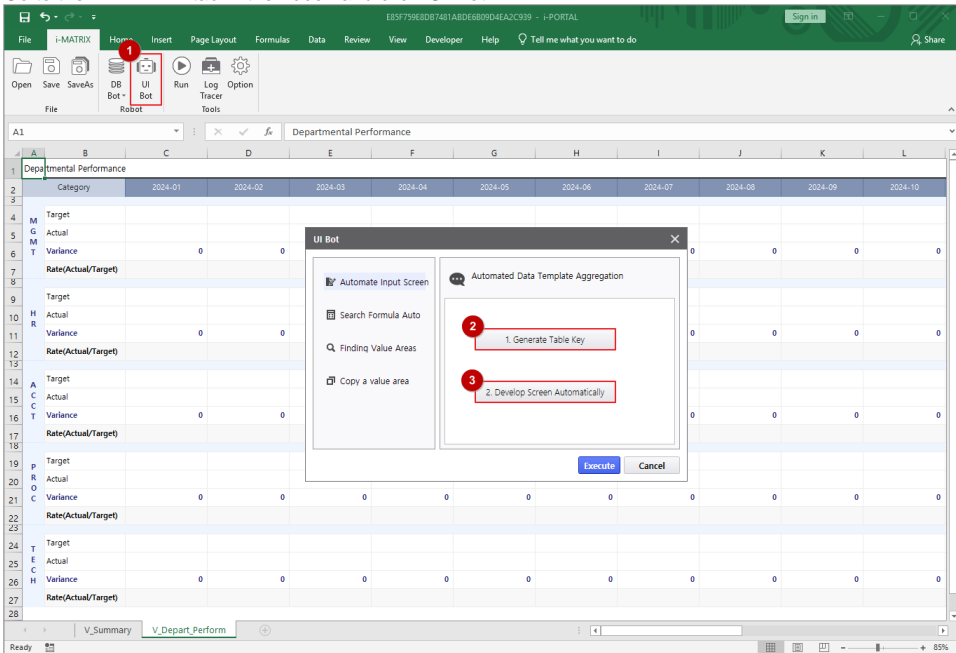
- Select the **entire table form** to be aggregated and name it **"table1"**.



- In the top-left corner of the area defined as table1, **enter the table name**.  
If you don't want this to be visible on the web, you can **hide the row in Excel**.



- The setup for web data entry is now complete. Next, we will configure the report so that data can be entered and saved with a click, and the saved data can be retrieved.
- Go to the 'i-MATRIX' tab in the ribbon and click 'UI Bot'.



- Move to the P1 sheet. Use the **VS\_YM** variable so that department performance can be displayed based on the date selected via the calendar.
- Define the **VS\_YM** variable and enter the desired year and month.
- Additionally, define **YYYYMM**, **YYYY**, and **MM**, and set the formulas as follows.

- YYYYMM formula : =LEFT( VS\_YM, 4) & "-" & RIGHT( VS\_YM, 2)

The screenshot shows the i-MATRIX software interface. The formula bar at the top contains the formula: `=LEFT( VS_YM, 4) & "-" & RIGHT( VS_YM, 2)`. Below the formula bar is a Variable List table with the following data:

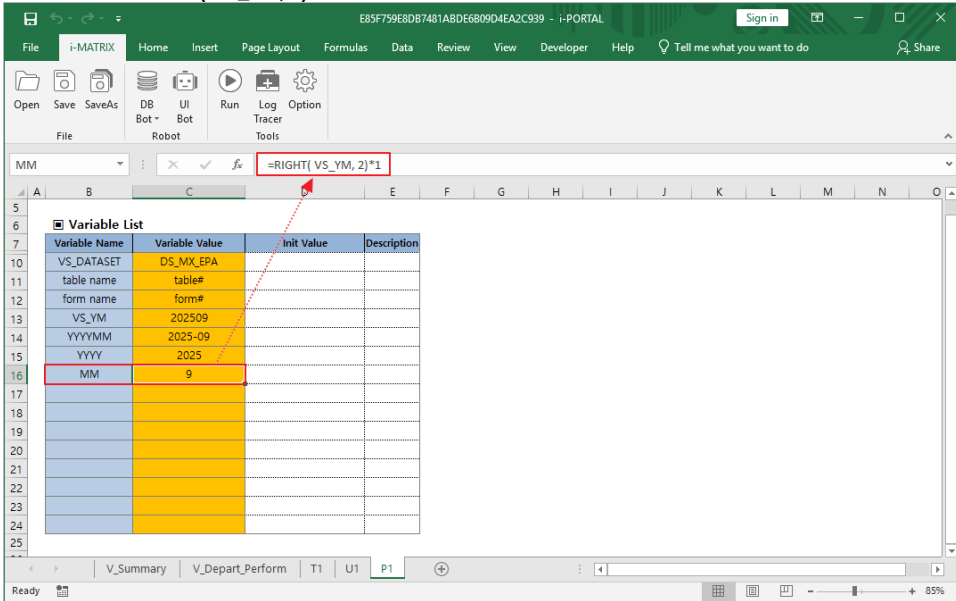
Variable Name	Variable Value	Init Value	Description
VS_DATASET	DS_MX_EPA		
table name	table#		
form name	form#		
VS_YM	202509		
YYYYMM	2025-09		
YYYY	2025		
MM	9		

- YYYY formula : =LEFT( VS\_YM, 4)\*1

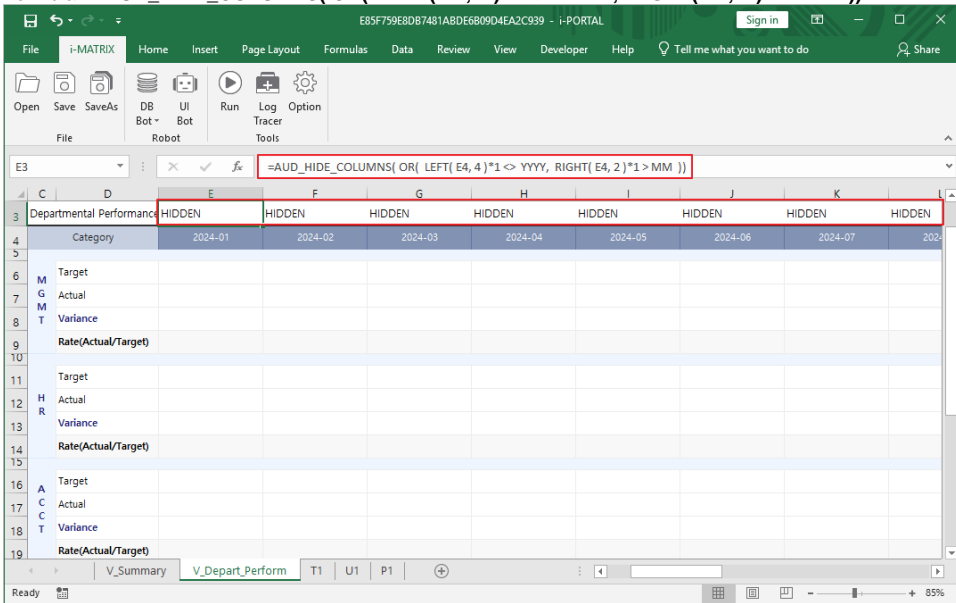
The screenshot shows the i-MATRIX software interface. The formula bar at the top contains the formula: `=LEFT( VS_YM, 4)*1`. Below the formula bar is a Variable List table with the following data:

Variable Name	Variable Value	init Value	Description
VS_DATASET	DS_MX_EPA		
table name	table#		
form name	form#		
VS_YM	202509		
YYYYMM	2025-09		
YYYY	2025		
MM	9		

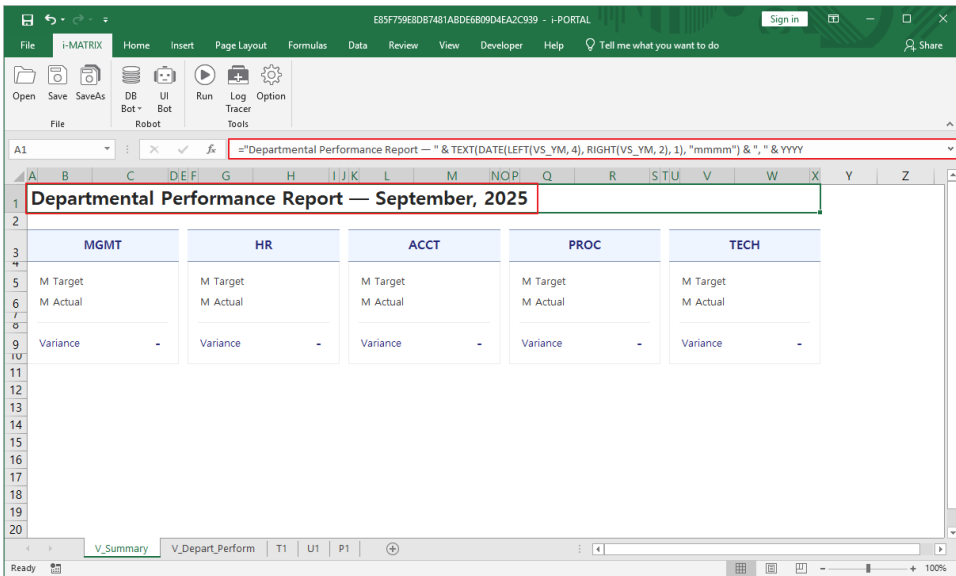
- MM formula : **=RIGHT( VS\_YM, 2)\*1**



- Now, let's move to the 'V\_Depart\_Perform' sheet.
- Use **AUD\_HIDE\_COLUMNS** to hide columns in the web display that fall outside the selected year and month.  
Formula : **=AUD\_HIDE\_COLUMNS( OR( LEFT( E4, 4)\*1 <> YYYY, RIGHT( E4, 2)\*1 > MM ))**



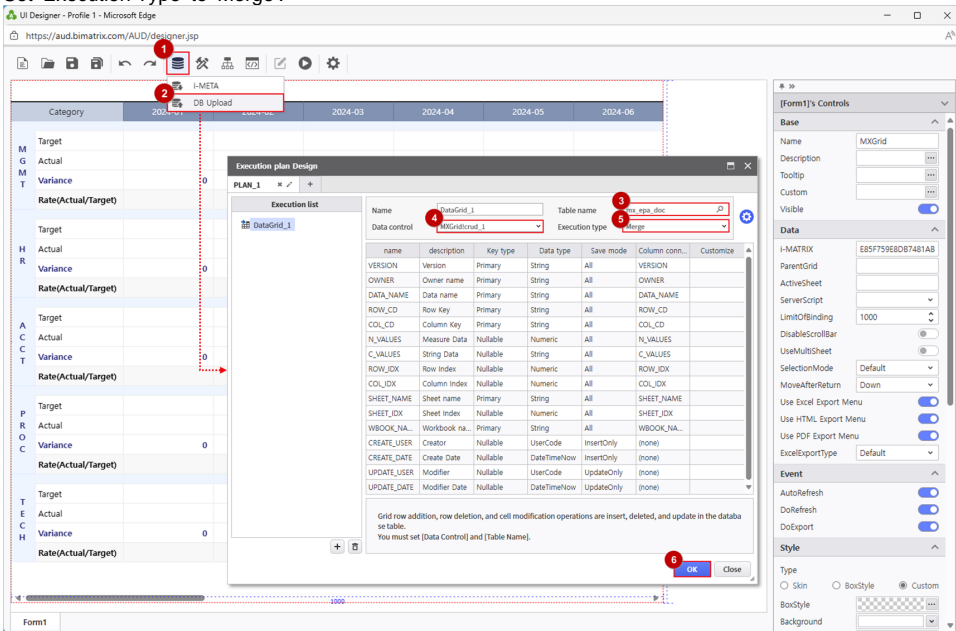
- On the 'V\_Summary' sheet, display the data entry screen title in the top-left corner.  
Formula : **="Departmental Performance Report — " & TEXT( DATE( LEFT( VS\_YM, 4), RIGHT( VS\_YM, 2), 1), "mmm") & ", " & YYYY**



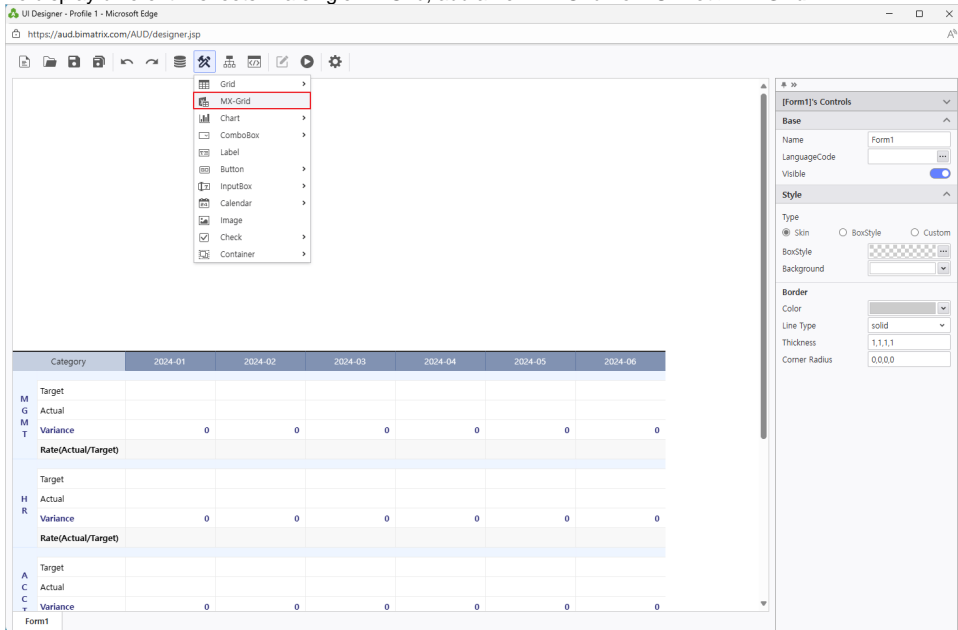
- The report setup and save are now complete. Return to the i-AUD Designer screen.

### Step 3. Connect to the DB for data storage and configure buttons

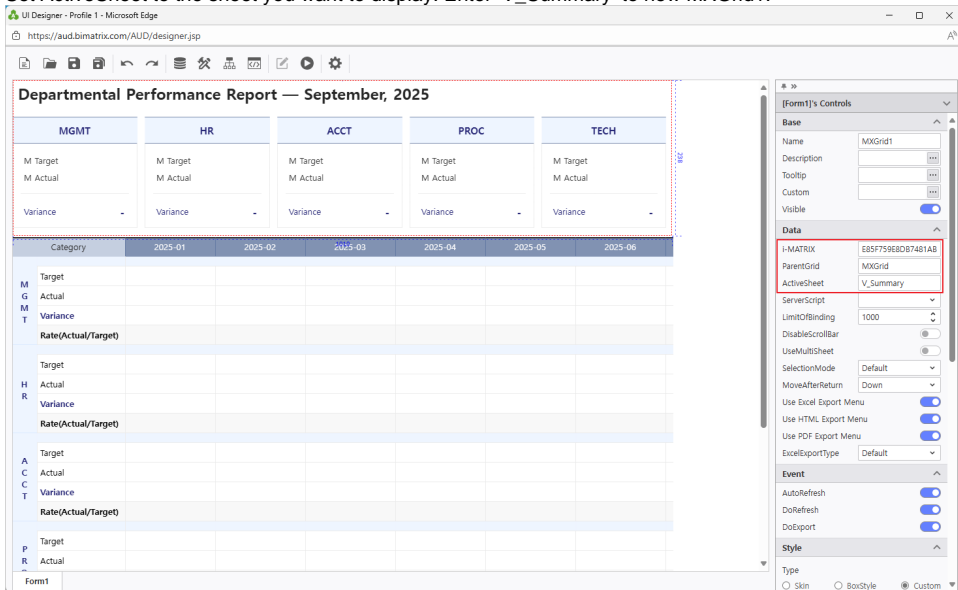
- In AUD Designer, double-click an empty cell in the data area and enter a number. Verify that the value is entered and totals are calculated automatically.
- To save the entered data to the database, connect to the DB and configure the Save and Retrieve buttons.
- Go to **DB Bot > DB Upload** and register an execution plan.
- Enter the 'Table Name' and select the 'Data Control' containing the data to be saved. Then, columns will be automatically mapped.
- Set 'Execution Type' to 'Merge'.



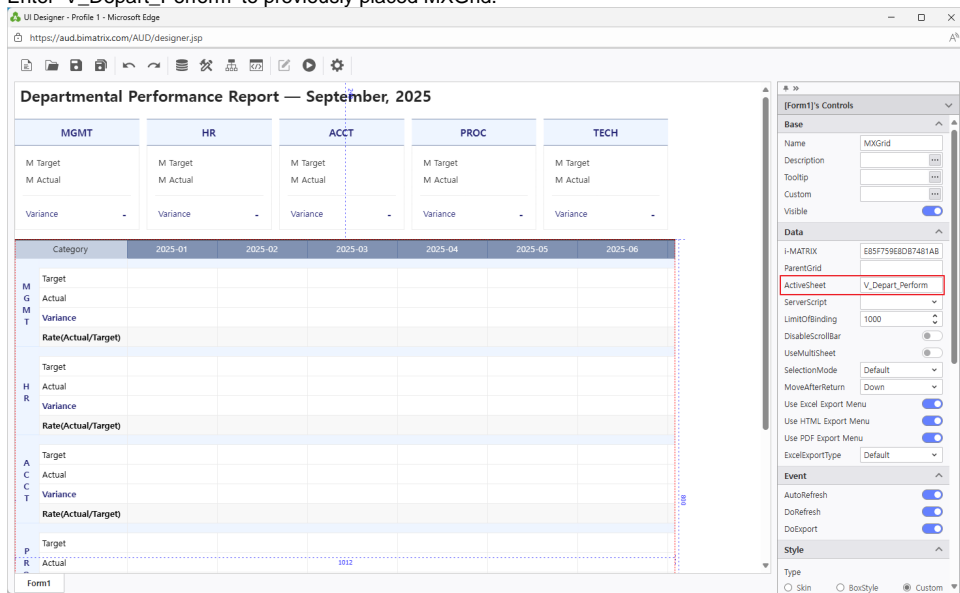
- To display different V sheets in a single MXGrid, add a new MXGrid from **UI Bot > MXGrid**.



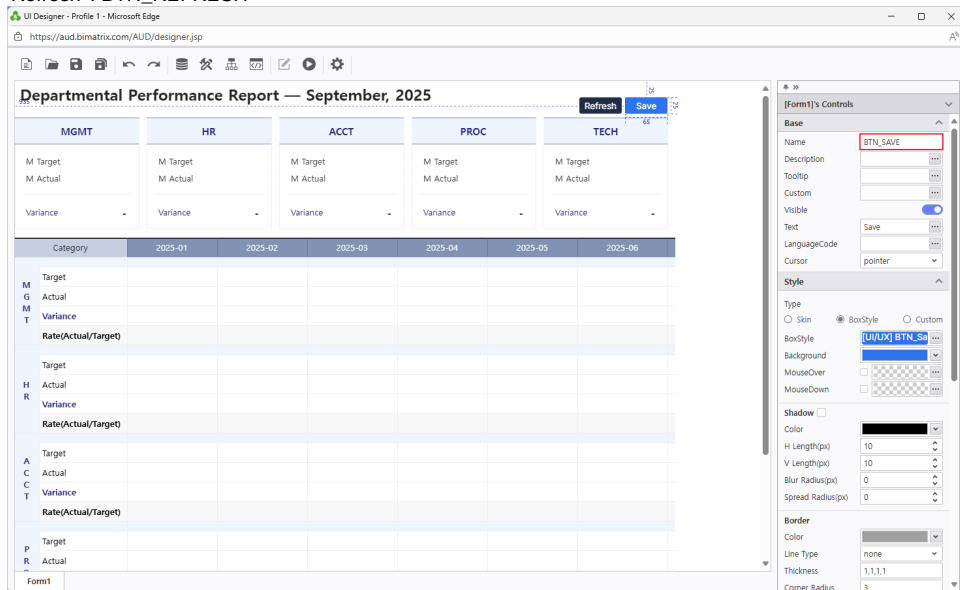
- Copy the code entered in the i-MATRIX property under Data of the previously placed 'MXGrid' and paste it into the same location for the newly added 'MXGrid1'.
- Set 'ParentGrid' to the name of the first MXGrid.
- Set ActiveSheet to the sheet you want to display. Enter 'V\_Summary' to new MXGrid1.



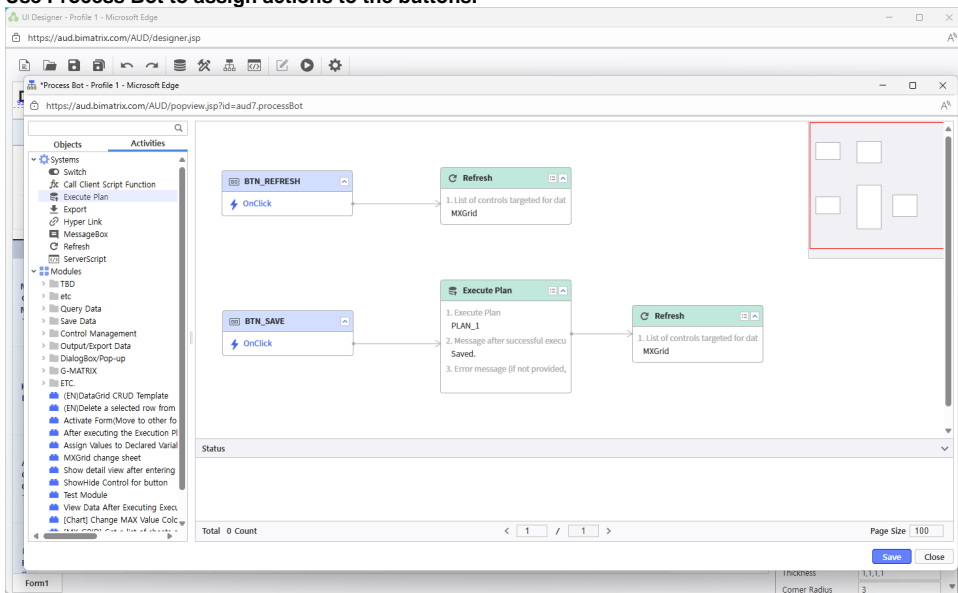
- Enter 'V\_Depart\_Perform' to previously placed MXGrid.



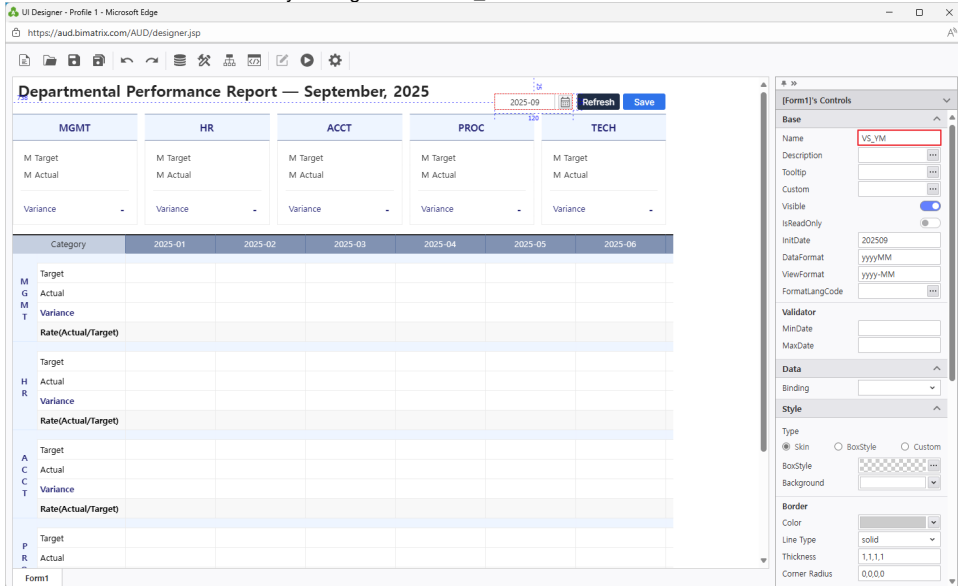
- The setup for saving data is complete.
- Now, let's save the entered data to the DB and set up a button to retrieve the saved data.
- Add two buttons from UI Bot > Button and place them in appropriate positions.
- Rename the buttons to distinguish their functions.  
'Save' : BTN\_SAVE  
'Refresh' : BTN\_REFRESH



- Use Process Bot to assign actions to the buttons.



- Add a year-month calendar using UI Bot > Calendar > Month.
- Link it to the Excel named cell by setting Name to VS\_YM so that data can be retrieved based on the selected month.



- Once this is set up, entering data and clicking the 'Save' button will store the data in the database, and the 'Refresh' button will fetch the stored data.

Departmental Performance Report — September, 2025

Category	2025-01	2025-02	2025-03	2025-04	2025-05	2025-06
M Target	920,000	900,000	900,000	900,000	900,000	300,000
M Actual	740,000	890,000	890,000	890,000	890,000	890,000
M Variance	180,000	10,000	10,000	10,000	10,000	-590,000
M Rate(Actual/Target)	80%	99%	99%	99%	99%	297%
H Target	1,090,000	980,000	980,000	980,000	980,000	1,030,000
H Actual	840,000	860,000	860,000	860,000	860,000	650,000
H Variance	250,000	120,000	120,000	120,000	120,000	380,000
H Rate(Actual/Target)	77%	88%	83%	71%	74%	63%
A Target	1,030,000	1,090,000	920,000	970,000	860,000	1,070,000
A Actual	900,000	830,000	760,000	720,000	840,000	890,000
A Variance	130,000	260,000	160,000	250,000	20,000	180,000
A Rate(Actual/Target)	87%	76%	83%	74%	98%	83%
P Target	870,000	970,000	850,000	910,000	860,000	850,000
P Actual	730,000	900,000	820,000	840,000	860,000	780,000
P Variance	140,000	70,000	30,000	70,000	0	70,000

#### Step 4. Save your report

- Save the completed report to **My Folder**.

Departmental Performance Report — September, 2025

Save File

My Folder

Name: Departmental Performance Management

Description: i-AUD file (\*.mtd)

OK Cancel

- From the EPA main screen, go to **[Menu] > [Individual]** in the left-hand sidebar.
- Click the Search(Magnifying glass icon) button to refresh the report list and confirm your saved report.

- Enter data on the web and save it to share with your team.

**Departmental Performance Report — September, 2025**

	MGMT	HR	ACCT	PROC	TECH
M Target	910,000	910,000	880,000	990,000	1,070,000
M Actual	680,000	810,000	690,000	830,000	790,000
Variance	230,000	100,000	190,000	160,000	280,000

Category	2025-01	2025-02	2025-03	2025-04	2025-05	2025-06
<b>M</b>						
Target	920,000	900,000	920,000	920,000	850,000	300,000
Actual	740,000	890,000	760,000	860,000	660,000	890,000
Variance	180,000	10,000	160,000	60,000	190,000	-590,000
Rate(Actual/Target)	80%	99%	83%	93%	78%	297%
<b>H</b>						
Target	1,090,000	980,000	990,000	1,020,000	920,000	1,030,000
Actual	840,000	860,000	820,000	720,000	680,000	650,000
Variance	250,000	120,000	170,000	300,000	240,000	380,000
Rate(Actual/Target)	77%	88%	83%	71%	74%	63%
<b>A</b>						
Target	1,030,000	1,090,000	920,000	970,000	860,000	1,070,000
Actual	900,000	830,000	760,000	720,000	840,000	890,000
Variance	130,000	260,000	160,000	250,000	20,000	180,000
Rate(Actual/Target)	87%	76%	83%	74%	98%	83%
<b>P</b>						
Target	870,000	970,000	850,000	910,000	860,000	850,000
Actual	730,000	900,000	820,000	840,000	860,000	780,000