



## HOW DO I ACCESS AND VIEW DASHBOARDS IN THE PBC ASSESSMENT?

### Section Links

Do I need to update the dashboards?

Navigate to the PBC Dashboards?

What dashboards are in the PBC Client Dashboards?

How to view the PBC Assessment dashboards in the PBC Client Dashboards?

How to view the Action Plan dashboards in the PBC Client Dashboards?

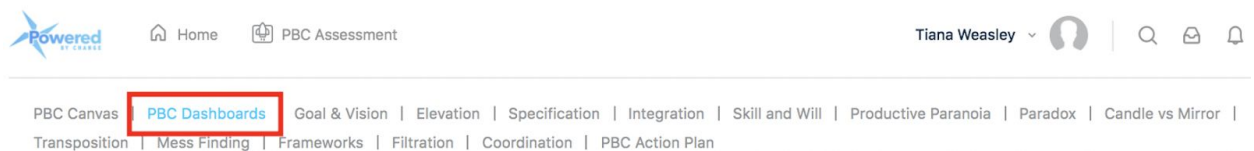
Additional relevant How Do I Guides for reference

### Do I need to update the dashboards?

- No, the dashboards are updated automatically with information from the PBC Assessment worksheets for the PBC Assessment dashboards, as well as from the PBC Action Plan for the Action Plan dashboards
- There is no way to manually update the dashboards directly

### Navigate to the PBC Dashboards?

- In the PBC Assessment in the menu at the top of the screen click on the PBC Dashboard to navigate to the dashboards



## How Do I Access and View Dashboards in the PBC Assessment Guide

- This takes you to the PBC Dashboards

Powered BY CANVAS

Home PBC Assessment

Tiana Weasley

PBC Canvas | **PBC Dashboards** | Goal & Vision | Elevation | Specification | Integration | Skill and Will | Productive Paranoia | Paradox | Candle vs Mirror | Transposition | Mess Finding | Frameworks | Filtration | Coordination | PBC Action Plan

### PBC CLIENT DASHBOARDS

Version 5 - 2021-02-13

NAME: \*  
Tiana Weasley

WHAT TO ACHIEVE: \*  
I want to grow my business to be as big and successful as possible and to increase profitability

PBC ASSESSMENT +

ACTION PLAN +

### What dashboards are in the PBC Client Dashboards?

- There are two types of dashboard:
  1. **PBC Assessment dashboards**
    - This shows the outcomes of the current PBC Assessment and, if more than one assessment has been done, it will also show a comparison of the assessments
  2. **Action Plan dashboards**
    - This shows the proportion of action items completed, in progress and not started for each assessment and enables a comparison across multiple assessments

PBC CLIENT DASHBOARDS

Version 3 - 2021-02-11

NAME: \*  
Tiana Weasley

WHAT TO ACHIEVE: \*  
I want to grow my business to be as big and successful as possible and to increase profitability

PBC ASSESSMENT +

ACTION PLAN +

## How Do I Access and View Dashboards in the PBC Assessment Guide

### How to view the PBC Assessment dashboards in the PBC Client Dashboards?

- To view the PBC Assessment dashboards, expand the 'PBC Assessment' section by clicking on the '+' sign

**PBC CLIENT DASHBOARDS**

Version 3 - 2021-02-11

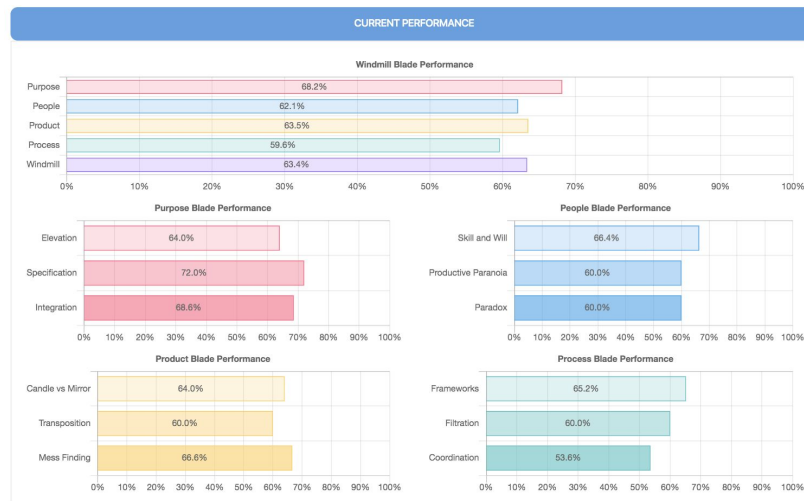
**NAME: \***

**WHAT TO ACHIEVE: \***

**PBC ASSESSMENT** +

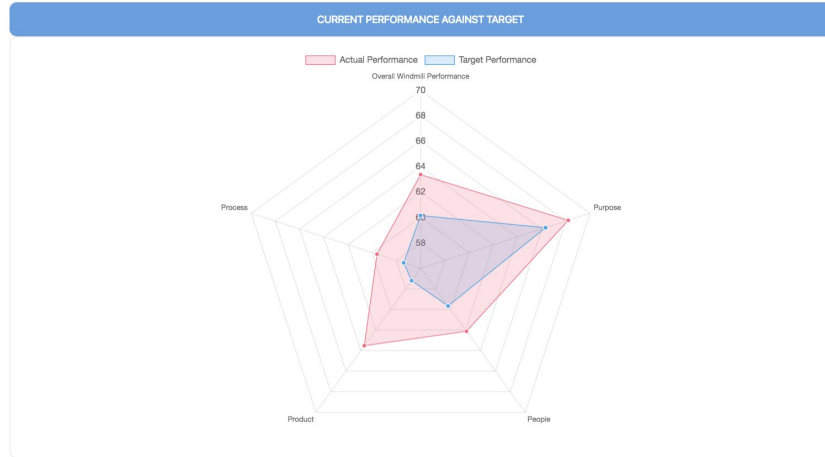
**ACTION PLAN** +

- This shows the performance for the selected assessment version
- If more than one assessment has been completed, the comparison dashboards will also show
- These enable you to compare your performance across multiple PBC Assessments, or versions
- The following dashboards are included:
  - 1. Current Performance**
    - This shows the overall performance for the PBC Assessment as well as the performance for each blade and each sub-blade



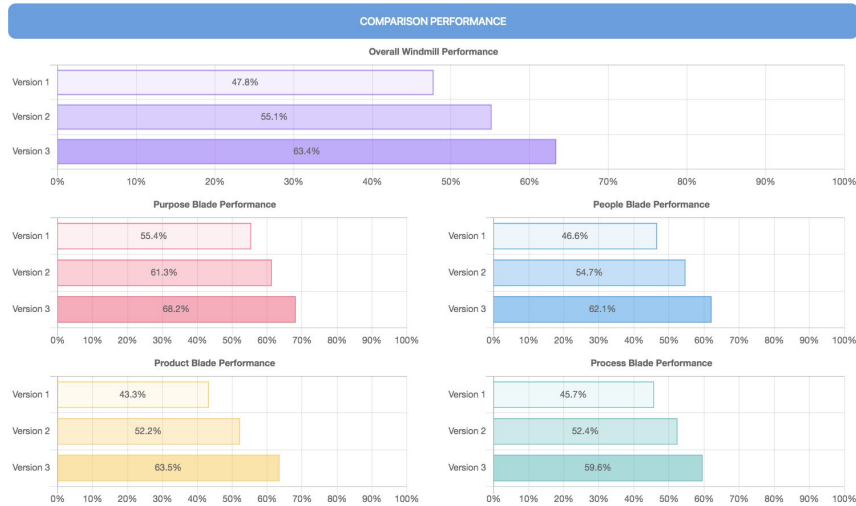
### 2. Current Performance Against Target

- This shows the actual performance for the current PBC Assessment for each blade and overall against the target
- After each assessment, for the next assessment a target is set of 5% higher for the next assessment, this is done automatically
- This chart will only show for assessments starting at version 2 as there is no target for version 1



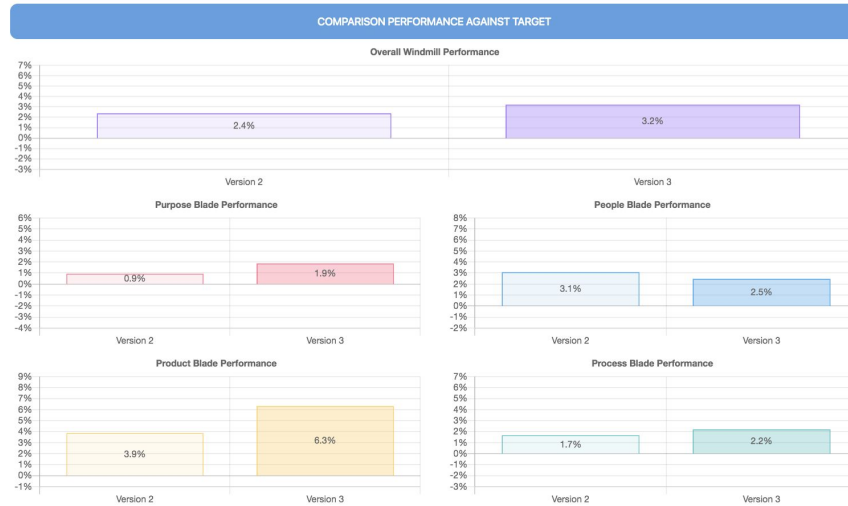
### 3. Comparison Performance

- This shows a comparison of performance for each PBC Assessment to enable you to see how performance has improved over time



### 4. Comparison Performance Against Target

- This shows the actual performance for each PBC Assessment against the target performance, for overall and each blade
- After each assessment, for the next assessment a target is set of 5% higher for the next assessment, this is done automatically
- This chart only shows assessments starting at version 2 as there is no target for version 1



## How Do I Access and View Dashboards in the PBC Assessment Guide

### How to view the Action Plan dashboards in the PBC Client Dashboards?

- To view the Action Items dashboards, expand the 'Action Plan' section by clicking on the '+' sign

**PBC CLIENT DASHBOARDS**

Version 3 - 2021-02-11

**NAME: \***

Tiana Weasley

**WHAT TO ACHIEVE: \***

I want to grow my business to be as big and successful as possible and to increase profitability

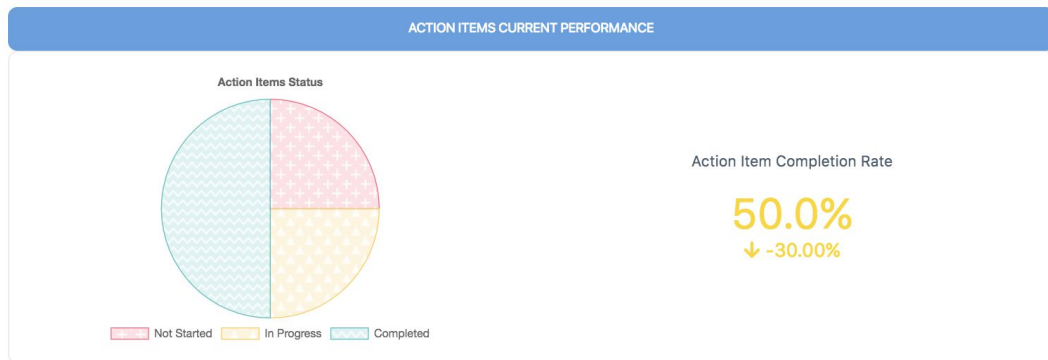
PBC ASSESSMENT+

ACTION PLAN+

- This shows the proportion of action items by status and also the completion rate for the selected assessment version and a comparison across all PBC Assessments
- These enable you to compare performance across multiple PBC Assessments, or versions in terms of how effectively action items are being completed, which should be created to help you achieve your goals
- The following dashboards are included:

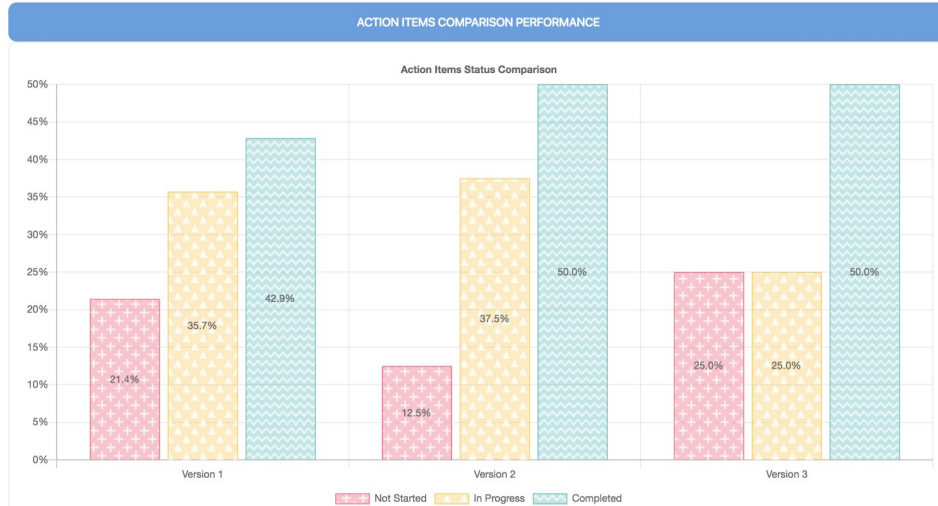
#### 1. Action Items Current Performance

- This shows the distribution of action items by status and the overall completion rate for the current assessment. A default target rate of 80% completion rate is set automatically within the solution



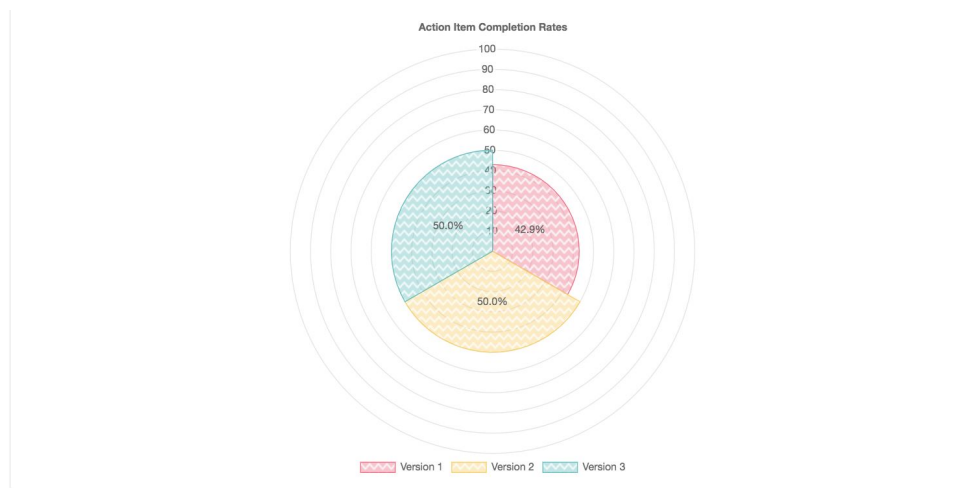
### 2. Action Items Comparison Performance

- This shows how effectively action items have been completed across multiple PBC Assessments, or versions. This is important as the action items should be targeted to helping you improve and achieve your goals.
- This chart enables you to gauge how well you are performing and progressing.



### 3. Action Items Completion Rate

- This shows the completion rate of action items across all PBC Assessments



## How Do I Access and View Dashboards in the PBC Assessment Guide

### Additional relevant How Do I Guides for reference

- For more information on selecting a version to view, refer to the following How Do I Guides:
  - [‘Select a PBC Assessment Version’](#)
  - [‘Interpret the Dashboards in the PBC Assessment’](#)