PSEA Dashboard – User Guidance

1. Purpose and Scope

The PSEA Dashboard is a Power BI report that helps UNICEF Country Offices and Regional Offices monitor the Protection from Sexual Exploitation and Abuse (PSEA) capacity status of Civil Society Organization (CSO) implementing partners with active Programme Documents.

The dashboard provides a focused view of partner capacity ratings and reassessment timelines. It is designed to help users identify partners that require follow-up, especially where the PSEA assessment is overdue or where capacity strengthening actions need to be monitored.

- Monitor CSO partners with active Programme Documents.
- Review the distribution of partners by PSEA capacity rating.
- Identify Low and Medium capacity partners with overdue reassessments.
- Support follow-up on Capacity Strengthening Action Plans.
- Validate partner-level information using dashboard exports and source-system checks.

2. Content: What the Report Shows

The dashboard contains two main pages. Each page supports a different part of the PSEA monitoring process and should be interpreted within the selected Region, Business Area, and filter context.

Dashboard Page	Purpose
Progress and Trends on Capacity Strengthening	Tracks reassessment timelines for Low and Medium capacity partners and highlights partners with overdue reassessments.
PSEA Capacity Rating Overview	Provides a consolidated overview of partners by PSEA capacity rating and supports partner-level review and validation.

2.1 Progress and Trends on Capacity Strengthening

This page helps users keep track of the reassessment timeline for partners. It shows whether the latest PSEA assessment is still within the expected timeline or is overdue. The page focuses on Low and Medium capacity partners and supports follow-up on reassessment and capacity strengthening activities.

This page shows the average time since PSEA assessment for Low and Medium capacity partners, reassessment timeline indicators, and partner-level details such as Region, Business Area, Partner Name, Vendor Number, PSEA Capacity Rating, PSEA Type of Assessment, PSEA Assessment Date, and Number of Months Since Last Assessed.

Recommended Follow-up

- Review the PSEA assessment status for partners with reassessments overdue by more than 7 months.
- Follow up on the implementation of the Capacity Strengthening Action Plan.
- Ensure mandatory activities in the capacity strengthening plan are completed within the agreed timeline to support improvement the partner capacity rating.

2.2 PSEA Capacity Rating Overview

This page provides a consolidated overview of partners' PSEA capacity ratings. It helps users understand how partners are distributed across the available PSEA capacity rating categories and supports partner-level monitoring, reporting, and validation.

This page shows a summary of the percentage of partners assessed by capacity rating, partner counts by CSO type and capacity rating, and partner-level details such as Region, Business Area, Partner Name, Vendor Number, CSO Type, PSEA Capacity Rating, PSEA Assessment Date, and PSEA Type of Assessment.

2.3 Quick Glossary

Term	Meaning in This Dashboard
Business Area	The UNICEF office or reporting area used to group and filter dashboard results.
Vendor Number (Vendor Code)	The partner identifier is used to distinguish partners and link records across datasets. In this guide, "Vendor Number" and "Vendor Code" refer to the same identifier name used in different source systems.
Civil Society Organization (CSO)	The partner type is included in the dashboard scope.
Active PD Partner	A CSO partner with an active Programme Document in the Datamart Intervention data.
PSEA Capacity Rating	The capacity category associated with the partner, such as Full Capacity, Medium Capacity, Low Capacity or other source-system categories.
PSEA Assessment Date	The assessment date used to calculate the number of months since the partner was last assessed.
Reassessment Timeline	A dashboard classification that shows whether the latest PSEA assessment is within timeline or overdue.
FR Document Number	The Funding Release document number used as part of the partnership data inclusion checks.

3. KPI and Indicator Definitions

This section explains the key indicators used in the dashboard. KPI names are written in plain language for clarity and may differ slightly from internal field or measure names in the Power BI model.

KPI / Indicator	Definition	Calculation Logic
Total Active PD Partners	The number of CSO partners with active Programme Documents included in the dashboard.	Count each partner once per Business Area using the unique vendor key.
Low Capacity Active PD Partners	The number of active PD partners with a Low PSEA capacity rating.	Counts active PD partners whose PSEA capacity rating is Low.
Medium Capacity Active PD Partners	The number of active PD partners with a Medium PSEA capacity rating.	Counts active PD partners whose PSEA capacity rating is Medium.
Low Capacity Partners Overdue for Reassessment	The number of Low capacity active PD partners who's latest PSEA assessment is overdue.	Counts Low capacity active PD partners where the latest PSEA assessment is 7 months old or older.
Medium Capacity Partners Overdue for Reassessment	The number of Medium capacity active PD partners who's latest PSEA assessment is overdue.	Counts Medium capacity active PD partners where the latest PSEA assessment is 7 months old or older.
Low Capacity Overdue Percentage	The percentage of Low capacity active PD partners whose reassessment is overdue.	Compares overdue Low capacity active PD partners against all Low capacity active PD partners in the current filter context.
Medium Capacity Overdue Percentage	The percentage of Medium capacity active PD partners whose reassessment is overdue.	Compares overdue Medium capacity active PD partners against all Medium capacity active PD partners in the current filter context.
Average Time Since Assessment	The average number of months since the latest PSEA assessment for the selected partner group.	Use the number of months between the PSEA Assessment Date and the current date, then averages the result for the selected group.

Reassessment Timeline	Shows whether a partner is within the expected reassessment timeline or overdue.	Classifies partners as Within timeline when the latest assessment is less than 7 months old, and Overdue when it is 7 months old or older.

3.1 Aggregation Logic

Partner counts are calculated at partner and Business Area level. This means one partner is counted once within each Business Area, even if that partner appears in multiple source records.

The dashboard uses a unique vendor key made from the last four digits of the Business Area Code and the Vendor Code. This helps avoid inflated counts caused by repeated transaction records and supports consistent linking between partnership data and active PD data.

Percentages are recalculated based on the filters selected by the user. For example, if a user filters to one Region or one Business Area, the overdue percentage is recalculated only for that selected group.

4. Data Sources

Source	What It Provides	How It Is Used
inSights Partnership Cube	Partner details, Business Area, Region, Transfer Type, Partner Type, FR Document Number, PSEA Assessment Date, PSEA Capacity Rating, and related partnership attributes.	Provides the partnership base used for partner identification, filtering, capacity rating, assessment date, and reporting context.
eTools Datamart Intervention API/export	Active Programme Document information.	Used to identify partners with active Programme Documents and align the dashboard with current PSEA KPI methodology.

4.1 Data Flow

Once source data becomes available through the inSights Partnership Cube and eTools Datamart, Power BI retrieves the required records during scheduled refresh.

Power Query then applies the required scope filters, removes records that cannot be reliably identified, creates the unique vendor key, and connects partnership records to active Programme Document data. After the data is loaded into the model, Power BI calculates partner counts, reassessment timeline status, and overdue percentages. These results appear in the dashboard outputs and tables.

4.2 Refresh Frequency and Dependencies

The data in the dashboard refreshes daily. Data availability depends on source-system updates, Datamart processing, the inSights cube refresh, and the Power BI dataset refresh. Recent updates in source systems may not appear immediately in the dashboard.

5. Data Preparation and Inclusion Logic

Before data reaches the Power BI model, it is prepared in Power Query to ensure that the dashboard includes the correct partner population and supports consistent reporting.

5.1 Partnership Data Inclusion Rules

The dashboard connects to the inSights Partnership Cube, pulls the required dimensions and measures, and applies the following inclusion rules:

- Include only HACT transfer types: HACT:DCT, HACT: Direct Payment, and HACT: Reimbursement.
- Include only partners classified as Civil Society Organization.
- Remove blank records where required for reliable partner and transaction identification.
- Exclude records where the FR Document Number is blank.

5.2 Active Programme Document Logic

The dashboard connects to active Programme Document data from the eTools Datamart Intervention API/export. This source is used to identify partners that currently have an active Programme Document.

A partner is included in the current dashboard logic when the partner is a Civil Society Organization and has an active Programme Document. This ensures the dashboard reflects the current PSEA KPI methodology and focuses on partners relevant to active programme implementation.

5.3 Unique Vendor Key

The model creates a unique vendor key using the last four digits of the Business Area code and the Vendor Code. This key is used to link partnership data with active PD data and to count partners consistently at Business Area level.

This approach is important because the same partner can appear in multiple source rows. The unique key helps ensure that partner counts are not overstated because of repeated transactions or records.

6. Report Logic

6.1 Reassessment Timeline

The reassessment timeline is based on the number of months between the PSEA Assessment Date and the current date. It helps users quickly identify whether a partner is still within the expected reassessment timeline or requires follow-up.

Timeline Category	Business Meaning
Within timeline	The latest PSEA assessment is less than 7 months old.
Overdue	The latest PSEA assessment is 7 months old or older.

6.2 Low Capacity Reassessment Logic

A Low capacity partner is counted as overdue when the partner has an active Programme Document, the PSEA capacity rating is Low, and the latest PSEA assessment is 7 months old or older. This helps users prioritize Low capacity partners that require reassessment follow-up and capacity strengthening attention.

6.3 Medium Capacity Reassessment Logic

A Medium capacity partner is counted as overdue when the partner has an active Programme Document, the PSEA capacity rating is Medium, and the latest PSEA assessment is 7 months old or older. This helps users monitor Medium capacity partners that may require reassessment follow-up.

6.4 Capacity Rating Overview Logic

The Capacity Rating Overview page summarizes partners by PSEA capacity rating. It helps users understand how the active PD partner population is distributed across available rating categories and supports partner-level validation through the detail table.

7. Filter Logic

Filters control which records are included in KPI cards, dashboard outputs, and detail tables. When validating results, users should apply the same filter context in the dashboard and in the source system or exported file.

Filter	How to Use It	Impact on Results
Region	Select one or more UNICEF regions.	Updates the report results to show only the selected region.
Business Area	Select a specific Country Office or reporting area.	Limits partner counts, percentages, dashboard outputs, and tables to the selected office or offices.
PSEA Capacity Rating	Select one or more capacity ratings.	Filters partner counts and detail tables to the selected capacity group.
Reassessment Timeline	Select Within timeline or Overdue where available.	Help users isolate partners that are within timeline or require reassessment follow-up.
Partner	Select a specific partner where the filter or table is available.	Supports partner-level checking and validation.
Assessment Date	Use where available to review assessments by date.	Helps focus the review on partners assessed during a selected period.

8. Navigation: How to Use the Report

8.1 Dashboard Layout

The dashboard contains two main pages: Progress and Trends on Capacity Strengthening and PSEA Capacity Rating Overview. Users can move between pages using the report page tabs.

8.2 Using the Progress and Trends Page

- Start with the Region and Business Area filters to focus on the office or area of interest.
- Review the average time since assessment for Low and Medium capacity partners.
- Use the reassessment timeline indicators to identify partners that are within timeline or overdue.
- Use the partner detail table to identify the partner, vendor number, assessment date, and number of months since last assessed.

8.3 Using the Capacity Rating Overview Page

- Use the Region and Business Area filters to focus on the capacity rating overview.
- Review the distribution of partners by PSEA capacity rating.
- Use the partner counts section to understand partner counts by CSO type and capacity rating.
- Use the detail table to validate partner-level capacity rating and assessment information.

9. Data Granularity

All partner-based calculations are performed at partner and Business Area level. The same vendor can be treated separately across different Business Areas because the reporting relationship is office specific.

Area	Granularity	What This Means
Partner counts	Unique vendor key at Business Area level	A partner is counted once per Business Area, even if multiple source records exist.
Reassessment timeline	Partner assessment level	The partner assessment date is used to determine whether the partner is within timeline or overdue.
Percentages	Current filter context	Percentages are recalculated based on selected Region, Business Area, rating, and other filters.

10. Refresh and Limitations

The dashboard refreshes on a scheduled basis and should not be read as a real-time report. Recent updates in source systems may not appear until the next successful refresh.

- Dashboard values depend on successful refresh of the inSights Partnership Cube, eTools Datamart, and Power BI dataset.

- Recent source-system updates may not be visible immediately.
- Active Programme Document status must be correctly available in the Datamart Intervention data.
- Missing or inconsistent Vendor Code or Business Area Code values may affect partner matching.
- Missing PSEA Assessment Date values may affect reassessment timeline classification.

11. Troubleshooting and Data Issues

Issue	Likely Reason	Recommended Check
Partner not visible	The partner may not meet the dashboard scope, may not be classified as CSO, may not have an active PD, or may not have matching partner identifiers.	Confirm Partner Type, active PD status, Business Area, Vendor Code, HACT transfer type, and FR Document Number.
Assessment date is missing	The assessment date may be blank in the source data or may not have refreshed into the dashboard.	Check the source record and allow for the next refresh cycle if the update is recent.
Overdue status looks incorrect	The assessment date or refresh timing may differ from the expected source value.	Confirm the latest assessment date and calculate whether it is less than 7 months old or 7 months old or older.
Dashboard value differs from source system	Filters, refresh timing, or source-system availability may differ.	Confirm the same Region, Business Area, Partner Type, active PD status, and capacity rating filters are being used.

12. Downloading and Validating Data

12.1 Export Steps

- Hover over the data element you want to export (for example, a table or summary item).
- Select the three dots or More options menu.
- Choose Export data.
- Select Data with current layout, where available.
- Export to Excel or CSV and apply the same filter context during validation.

12.2 Validation Guidance

Validate Against	Validation Approach

inSights Partnership Cube	Apply the same Region, Business Area, Partner Type, HACT Transfer Type, and FR Document Number checks. Confirm the partner and office identifiers match the dashboard.
eTools Datamart Intervention API/export	Confirm that the partner has an active Programme Document and that the Vendor Code and Business Area match the dashboard record.
Dashboard export	Use the exported partner-level table to confirm capacity rating, assessment date, reassessment timeline, and partner count.
Assessment date logic	Check whether the assessment is less than 7 months old or 7 months old or older. This determines the reassessment timeline category.

12.3 Standard Validation Checklist

- Confirm the dashboard page being validated: Progress and Trends on Capacity Strengthening or PSEA Capacity Rating Overview.
- Confirm that dashboard filters match the source-system filters, including Region and Business Area.
- Confirm that the partner is a Civil Society Organization.
- Confirm that the partner has an active Programme Document.
- Confirm that the relevant HACT transfer type and non-blank FR Document Number checks are applied where partnership data is being validated.
- Confirm the PSEA Capacity Rating and PSEA Assessment Date.
- Count partners once per Business Area using the unique vendor key.
- Allow for refreshing timing before treating a mismatch as a defect.

13. Rebuild Logic: Step-by-Step

The steps below describe how the dashboard logic can be recreated at a high level.

- Connect to the inSights Partnership Cube.
- Pull the required dimensions and measures for partner, Business Area, transfer type, partner type, FR Document Number, PSEA Assessment Date, and PSEA Capacity Rating.
- Keep only HACT:DCT, HACT: Direct Payment, and HACT: Reimbursement transfer types.
- Keep only partners classified as Civil Society Organization.
- Remove blank records where required and exclude records with blank FR Document Number.
- Create the unique vendor key using the last four digits of Business Area code and Vendor Code.
- Connect to active Programme Document data from the eTools Datamart Intervention API/export.
- Match active PD partners to partnership records using the partner and office identifiers.

- Keep CSO partners with active Programme Documents for the dashboard logic.
- Calculate months since PSEA assessment and classify partners as Within timeline or Overdue.
- Create partner count and overdue percentage measures for Low and Medium capacity partners.
- Validate outputs against dashboard exports, inSights Partnership data, and Datamart Intervention data before publishing.

14. Final Outcome

By using this guide, dashboard users should be able to:

- Understand what each dashboard page shows and how it should be used.
- Interpret the main KPIs and reassessment timeline categories correctly.
- Identify the data sources behind the dashboard.
- Apply filters and review partner-level details for follow-up.
- Download and validate data using the correct source-system checks.
- Understand the high-level report logic if the model needs to be reviewed or rebuilt.