

MINI PROJECT REPORT

Performance Tracking System

in MS Office using Generative AI

Submitted in Partial Fulfillment of the Requirements for the

Short-Term Internship Programme

AI Essentials with Office Administration

Domain	Office Productivity & AI-Assisted Management
Tools Used	Microsoft Excel, Microsoft Word, Generative AI (ChatGPT / Copilot / Gemini)
Internship	AI Essentials with Office Administration
Submission Year	2026

Abstract

Performance tracking is a core function of every organization, enabling managers to assess employee contributions, identify skill gaps, recognize high performers, and make informed HR decisions. Traditionally, this process relied on manual record-keeping, subjective observation, and periodic review meetings — methods that are time-consuming, inconsistent, and difficult to scale.

This project, Performance Tracking System in MS Office using Generative AI, develops a complete, structured employee performance management workbook using Microsoft Excel. The system enables organizations — or classrooms — to record, calculate, and analyze performance data across five key performance indicators (KPIs): Task Quality, Punctuality, Teamwork, Communication, and Initiative. All scoring, grading, and summarization are handled automatically through Excel formulas, dropdown menus, and conditional formatting — requiring no programming knowledge from the user.

The innovation of this project lies in its integration of Generative AI for post-evaluation feedback. After scores are entered, users follow structured prompt templates — provided within the workbook — to submit employee data to an AI tool (such as ChatGPT, Microsoft Copilot, or Google Gemini). The AI generates written performance summaries, identifies strengths and improvement areas, and recommends action plans. This approach brings the analytical power of modern AI into a familiar Office environment without requiring any technical background.

The deliverable is a seven-sheet Microsoft Excel workbook covering employee data management, monthly performance logging, an auto-calculated KPI dashboard, a complete AI evaluation guide with ready-to-use prompt templates, visual charts and reports, and a quick-reference card for AI tools.

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1. Introduction

In any organization — whether a corporate office, a non-profit, or an educational institution — understanding how well individuals are performing is essential. A structured performance tracking system helps managers move beyond gut feelings and anecdotal impressions toward objective, data-backed evaluations. When performance data is consistently recorded and analyzed, patterns emerge: who is excelling, who needs support, which teams are thriving, and which months show seasonal dips in productivity.

Microsoft Excel is the most widely used tool for data organization and analysis in office environments worldwide. It is accessible, familiar, and powerful enough to handle the data volume of small to medium-sized teams without requiring specialized software. Using Excel's built-in capabilities — formulas, dropdown lists, conditional formatting, and charts — a performance tracking system can be built that is both functional and easy to maintain.

Generative AI tools — including Microsoft Copilot, ChatGPT, Google Gemini, and Claude — have emerged as powerful writing and analysis assistants. While they do not replace human judgment, they significantly accelerate the process of converting raw numbers into written narrative evaluations. A manager who might spend an hour writing five performance summaries can, with AI assistance, complete the same task in fifteen minutes — while maintaining quality and consistency.

This project integrates both. Excel handles what it does best: storing structured data, calculating scores, applying rules, and visualizing trends. Generative AI handles what it does best: transforming numbers into readable, contextually appropriate narrative feedback. Together, they form a practical, professional-grade performance management system that is entirely within reach of anyone who can use a spreadsheet and a web browser.

1.1 Course Context

This project is the mini project submission for the AI Essentials with Office Administration internship programme. The curriculum covered foundational AI concepts, generative AI applications, Microsoft Word for document creation, and Microsoft Excel for data management and analysis. This project consolidates all of those learning areas into a single, deployable deliverable.

2. Objectives

- Design a structured employee performance tracking system using Microsoft Excel
- Record and manage employee master data including department, role, and status
- Enable monthly logging of five KPI scores per employee with data validation
- Auto-calculate overall performance scores and letter grades using Excel formulas
- Visualize performance trends through department-level and individual-level charts
- Integrate Generative AI for automated narrative performance evaluation
- Provide ready-to-use AI prompt templates accessible within the workbook
- Create a feedback logging system for recording and tracking AI-generated evaluations
- Produce a workbook usable by non-technical staff with no programming knowledge

3. Tools and Technologies

Tool	Category	How It Is Used in This Project
Microsoft Excel	Spreadsheet	Main workbook: data entry, formulas, charts, conditional formatting
Microsoft Word	Word Processing	Project documentation (this report)
ChatGPT (OpenAI)	Generative AI	Performance narrative generation using structured prompts
Microsoft Copilot	Generative AI	Built into Office; used for AI evaluation directly in the browser
Google Gemini	Generative AI	Alternative AI tool for summarization and comparison prompts
Claude (Anthropic)	Generative AI	Alternative for formal, structured performance appraisals

No programming language, database software, or technical installation is required. The entire system operates within Microsoft Office and a web browser.

4. System Design Overview

The performance tracking system is built on a layered architecture. Each layer has a clear purpose and feeds into the next, creating a complete data flow from raw input to AI-generated narrative output.

Layer	Sheet	Function	Output
1	 Employee Data	Data Input	Master record of all employees
2	 Monthly Log	Data Entry + Auto-Calc	KPI scores, overall score, grade per month per employee
3	 KPI Dashboard	Aggregation + Summary	Employee-level averages, cumulative grades, month count
4	 AI Evaluation Guide	AI Integration	Prompt templates + AI Feedback Log
5	 Charts & Reports	Visualization	Bar charts, KPI breakdowns, grade distribution table
6	 Quick Reference	User Guide	AI tool directory, usage tips, do's and don'ts
7	 Cover	Navigation	Workbook overview and step-by-step instructions

Data Flow Summary

The flow through the system is linear and intuitive:

1. Employee details entered in  Employee Data
2. Monthly KPI scores entered in  Monthly Log → Excel calculates Overall Score and Grade automatically
3.  KPI Dashboard pulls averages from Monthly Log using AVERAGEIF formulas → no manual work needed
4. User copies score data → pastes into AI prompt template in  AI Evaluation Guide → submits to AI tool
5. AI response pasted back into AI Remarks column and/or AI Feedback Log
6.  Charts & Reports display trends automatically from Monthly Log data

5. Workbook Structure — Sheet by Sheet

5.1 🏠 Cover Sheet — Navigation Hub

The Cover sheet serves as the landing page of the workbook. It provides:

- A visual title banner identifying the project
- Colour-coded navigation cards for each sheet — clicking the sheet tab navigates directly
- A six-step how-to-use guide explaining the complete workflow from data entry to AI evaluation

The Cover sheet uses no formulas. It is a visual and instructional layer designed to help any user, regardless of Excel experience, understand the workbook immediately.

5.2 📋 Employee Data Sheet — Master Employee Records

This sheet stores the permanent record of every employee in the system. Each row represents one employee and contains twelve data fields:

Column	Field	Input Type
A	Employee ID	Manual text entry (e.g., EMP001)
B	Full Name	Manual text entry
C	Department	Dropdown: HR, Finance, Operations, Marketing, IT, Administration, Sales, Customer Support
D	Designation / Role	Manual text entry
E	Date of Joining	Date entry
F	Employment Type	Dropdown: Full-Time, Part-Time, Contract, Intern
G-L	Manager, Email, Phone, Location, Status, Remarks	Manual entry; Status has dropdown: Active, On Leave, Resigned, Terminated

Pre-loaded with five sample employees across different departments for immediate demonstration. Supports up to 50 employees in the current design; expandable by simply adding rows.

5.3 📊 Monthly Performance Log — Core Data Entry Sheet

This is the primary working sheet where performance data is entered monthly. It contains 18 columns organized into logical groups:

Group 1 — Employee Identification (Columns A–C)

Emp ID, Name, Department – manually typed or copied from Employee Data sheet.

Group 2 — Period (Column D)

Month-Year dropdown (e.g., Jun-2026) – ensures consistent date formatting.

Group 3 — KPI Scores (Columns E–I)

Five KPIs scored 1–10 each:

• Task Quality • Punctuality • Teamwork • Communication • Initiative

Data validation enforces whole numbers between 1 and 10 only.

Group 4 — Auto-Calculated Fields (Columns J–K)

Column J (Overall Score): =AVERAGE(E:I) – average of all five KPI scores.
 Column K (Grade): IF formula assigning letter grade based on overall score.
 Both columns calculate automatically – user does not touch them.

Group 5 — Supplementary Data (Columns L–O)

Attendance % (validated 0–100), Target Met (dropdown), Training Hours, Incidents.

Group 6 — Qualitative Columns (Columns P–R)

Supervisor Comments, AI Remarks (paste AI output here), Action Plan.

A colour scale applies to the Overall Score column: red for low scores, amber for mid-range, green for high — giving an immediate visual heat-map of performance across all records. A data bar applies to Attendance % for quick visual scanning.

5.4 🎯 KPI Dashboard — Auto-Summary View

The KPI Dashboard aggregates all Monthly Log data and presents it in two ways:

Summary Scorecards

Four highlighted boxes at the top display: Total Employees (from Employee Data), Average Overall Score across all records, count of Top Performers (score ≥ 8), and count of employees Needing Support (score < 6). All four update automatically whenever data is added to the Monthly Log.

Per-Employee Summary Table

One row per employee showing their average score for each of the five KPIs, their overall average, their grade, their average attendance, and the number of months recorded. These are calculated using AVERAGEIF formulas that match Employee IDs across sheets — so when you add a new monthly record for EMP001, all of EMP001's averages update instantly.

5.5 🤖 AI Evaluation Guide — The AI Integration Layer

This sheet is the most distinctive element of the project. It bridges the Excel data system with Generative AI tools. It contains four sections:

What is AI-Powered Evaluation

A plain-language explanation of how to use AI for performance evaluation — written for users who may be encountering AI tools for the first time. It explains that no coding is involved: the user simply copies data into a text prompt and submits it to a website.

Four Prompt Templates

Ready-to-use prompt templates for four evaluation scenarios (detailed in Section 9 of this document). Each template is formatted with square-bracket placeholders indicating exactly which values the user should replace with their employee's data.

AI Feedback Log Table

An 11-column table for recording every AI evaluation performed: employee, month, which prompt was used, which AI tool was used, the AI-generated text, key points identified, and who performed the evaluation. This creates an audit trail of all AI-assisted evaluations.

5.6 Charts & Reports — Visual Performance Overview

This sheet provides three visual outputs:

- Overall Score Bar Chart: A column chart showing each employee's overall average performance score at a glance — the tallest bar is the highest performer.
- KPI Breakdown Grouped Bar Chart: A grouped column chart showing all five KPI scores side-by-side for each employee — immediately reveals whether a specific skill is consistently low across the team.
- Grade Distribution Table: Shows how many employees fall into each grade category (A+, A, B+, B, C, D) and their percentage share — useful for identifying whether the grading distribution is balanced.

All charts are linked to the Monthly Log data and update automatically when new entries are added.

5.7 Quick Reference Card

A single-page at-a-glance reference containing: a directory of five AI tools with their URLs and pricing tiers, and eight tips for getting better responses from AI tools — including privacy cautions (do not share personal identification numbers) and the reminder that AI output should always be reviewed before official use.

6. Performance KPIs — Definitions and Scoring

Five Key Performance Indicators (KPIs) are tracked for each employee each month. Each is scored on a scale of 1 to 10, where 1 is the lowest and 10 is the highest. Scores must be whole numbers.

#	KPI	What it measures	Score 1–3	Score 8–10
1	Task Quality	Accuracy, completeness, and standard of work delivered	Frequent errors	Consistently excellent
2	Punctuality	On-time arrival, deadline adherence, meeting attendance	Often late or missing	Always on time
3	Teamwork	Collaboration, conflict resolution, peer support	Isolates or creates friction	Strong team contributor
4	Communication	Clarity in verbal and written communication with team and management	Unclear or poor communication	Clear, professional communication
5	Initiative	Proactive problem-solving, idea generation, going beyond assigned tasks	Waits to be told	Self-driven, proactive

The Overall Score is the simple arithmetic mean of all five KPI scores. For example, if an employee scores 8, 7, 9, 8, and 7, their Overall Score is $(8+7+9+8+7)/5 = 7.8$, which maps to a B+ Satisfactory grade. This calculation is performed automatically by Excel; the supervisor only needs to enter the five individual scores.

7. Grading Scale

The grading system translates numerical Overall Scores into letter grades. This makes performance levels immediately legible to HR teams, department heads, and employees themselves — without needing to interpret decimal numbers.

Grade	Label	Score Range	Interpretation
A+	Excellent	9.0 – 10.0	Outstanding contributor; considered for recognition
A	Good	8.0 – 8.9	Consistently meets and often exceeds expectations
B+	Satisfactory	7.0 – 7.9	Meets most expectations with some room to grow
B	Average	6.0 – 6.9	Meets minimum expectations; coaching recommended
C	Needs Improvement	5.0 – 5.9	Below expectations; structured support plan required
D	Poor	Below 5.0	Serious performance concerns; immediate intervention

The grade is assigned by a nested IF formula in Excel that evaluates the Overall Score against these thresholds in descending order. The formula is structured so that the highest grade is checked first, ensuring accurate assignment across all ranges. No manual grade entry is ever needed.

8. AI Integration — How It Works

The AI integration in this project follows a simple three-step process that any office user can perform in under five minutes per employee, using any device with a web browser.

Step 1 — Identify the Employee to Evaluate

Open the  Monthly Log or  KPI Dashboard and locate the employee whose evaluation you want to generate. Note their name, department, KPI scores, overall score, attendance percentage, and target completion status.

Step 2 — Select and Fill a Prompt Template

Open the  AI Evaluation Guide sheet. Choose the appropriate prompt template based on your evaluation need:

- Prompt 1 for a standard monthly performance summary
- Prompt 2 to compare two months and assess progress
- Prompt 3 for a quarterly or annual formal appraisal
- Prompt 4 for a support plan when a score is below 6

Replace all values inside square brackets [LIKE THIS] with the actual employee data. The prompt is designed to give the AI all the context it needs to produce meaningful output.

Step 3 — Submit to AI and Paste the Response

Go to your preferred AI tool (ChatGPT at chat.openai.com, Microsoft Copilot at copilot.microsoft.com, Google Gemini at gemini.google.com, or any other). Paste the completed prompt and press Enter. Read the AI's response, adjust if needed, and paste the relevant output back into:

- Column Q (AI Remarks) in the  Monthly Log for that employee's row
- The AI Feedback Log table in the  AI Evaluation Guide sheet for audit purposes

What the AI Produces

Depending on the prompt used, the AI will generate one or more of the following:

- A 2–5 sentence performance narrative written in professional HR language
- A list of the top 2–3 strengths demonstrated by the employee that month
- A list of the top 2–3 areas needing development, framed constructively
- Specific, measurable improvement goals with a suggested timeline
- A recommended appraisal rating label (for quarterly/annual reviews)
- A 30-day action plan for employees with low scores

The AI output is a starting point. Supervisors are expected to personalise the response — adding specific examples from direct observation, adjusting tone for the individual employee's situation, and removing any content that does not apply. The AI accelerates the writing process; human judgment remains central.

9. AI Prompt Templates (Full Text)

The following are the four prompt templates embedded in the  AI Evaluation Guide sheet. Each is designed to be copy-paste ready, with bracketed placeholders to be filled in before submission.

Prompt 1 — Monthly Performance Summary

When to use: Standard monthly review for any employee.

"I have performance data for an employee and need a written evaluation summary.

Employee Name: [NAME]

Department: [DEPARTMENT]

Month: [MONTH-YEAR]

KPI Scores (out of 10):

Task Quality: [SCORE] Punctuality: [SCORE] Teamwork: [SCORE]

Communication: [SCORE] Initiative: [SCORE]

Overall Average Score: [X.X / 10]

Attendance: [XX]%

Target Met: [Yes / No / Partial]

Based on this data, please write:

1. A 2-3 sentence performance summary
2. Top 2 strengths observed
3. Top 2 areas needing improvement
4. One specific recommendation for next month"

Prompt 2 — Month-on-Month Progress Check

When to use: When two months of data are available and you want to assess improvement.

"I want to compare an employee's performance over two months.

Employee Name: [NAME]

Month 1 — [MONTH]: Task Quality [X], Punctuality [X], Teamwork [X],
Communication [X], Initiative [X], Overall [X.X]

Month 2 — [MONTH]: Task Quality [X], Punctuality [X], Teamwork [X],
Communication [X], Initiative [X], Overall [X.X]

Please analyze:

1. Which KPIs improved and by how much?
2. Which KPIs declined or stayed the same?
3. What does this trend suggest about the employee's development?
4. What should the supervisor focus on in the next review cycle?"

Prompt 3 — Quarterly or Annual Formal Appraisal

When to use: End-of-quarter or year-end appraisal for formal HR records.

"Based on the following quarterly performance data, write a formal performance appraisal.

Employee: [NAME] | Department: [DEPT] | Period: [Q1/Q2/Q3/Q4] [YEAR]

Monthly Scores (Overall Average per month):

Month 1: [X.X] Month 2: [X.X] Month 3: [X.X]

Quarter Average: [X.X / 10]

Average Attendance: [XX]%

Training Hours Completed: [X]

Incidents Reported: [X]

Please write:

1. A formal evaluation paragraph (4-5 sentences)
2. Achievement highlights for the quarter
3. Development areas to address next quarter
4. Recommended appraisal rating: Excellent / Good / Satisfactory / Needs Improvement / Poor
5. Suggested goals for next quarter"

Prompt 4 — Support Plan for Low Performers

When to use: When an employee's overall score falls below 6.0.

"An employee has received a below-average performance score and needs a support plan.

Employee: [NAME] | Department: [DEPT]

Scores this month:

Task Quality: [X] Punctuality: [X] Teamwork: [X]
Communication: [X] Initiative: [X] Overall: [X.X / 10]

Supervisor notes: [PASTE SUPERVISOR COMMENTS FROM COLUMN P]

Please generate:

1. A compassionate but honest summary of performance gaps
2. A 30-day improvement action plan with 3 specific, measurable goals
3. Resources or training that could help address the identified gaps
4. A suggested check-in schedule for the supervisor"

10. Excel Formulas Used

The workbook uses the following Excel formulas. These are entered once and work automatically — users do not need to know how to write them; they are already built into the file.

Formula / Function	Example in Workbook	What it does
AVERAGE()	=AVERAGE(E5:I5)	Calculates the mean of all five KPI scores for one row
IF() nested	=IF(J5>=9,"A+ Excellent",IF(...))	Assigns letter grade based on overall score thresholds
AVERAGEIF()	=AVERAGEIF(A5:A104,"EMP001",J5:J104)	Averages scores for a specific employee ID across all months
COUNTIF()	=COUNTIF(J5:J104,">="&8)	Counts how many records have a score of 8 or above
COUNTA()	=COUNTA(A4:A53)	Counts total number of employees entered in the data sheet
IFERROR()	=IFERROR(AVERAGE(...))	Prevents #DIV/0! or #VALUE! errors from showing in empty cells
Data Validation	Dropdown lists; number range 1–10	Restricts cell inputs to valid choices only
Conditional Formatting	Color Scale on Overall Score	Red → Amber → Green heat-map based on numeric value
Data Bar	Applied to Attendance %	Shows a visual bar proportional to the attendance value

11. Sample Data and Output

The workbook is pre-loaded with five sample employees and one month of performance data (June 2026) to demonstrate how the system works. The following table shows the sample records from the Monthly Performance Log:

Name	Dept	Month	Quality	Punct.	Team	Comm. n.	Init.	Overall / Grade
Priya Sharma	HR	Jun-2026	8	7	9	8	7	7.8 / B+ Satisfactory
Arun Reddy	Finance	Jun-2026	7	8	7	6	8	7.2 / B+ Satisfactory
Meena Latha	Operations	Jun-2026	6	7	8	7	6	6.8 / B Average
Suresh Babu	Marketing	Jun-2026	9	8	8	9	9	8.6 / A Good
Lakshmi Devi	Admin	Jun-2026	7	6	7	7	5	6.4 / B Average

Sample AI Output (generated using Prompt 1 for Suresh Babu)

The following is an example of the type of AI response generated when Suresh Babu's data is submitted using Prompt 1:

AI-Generated Output (ChatGPT, Prompt 1):

Performance Summary: Suresh Babu has delivered an outstanding performance in June 2026, achieving an overall score of 8.6 out of 10. His exceptional scores in Task Quality, Communication, and Initiative reflect a highly motivated and capable professional who consistently goes beyond what is expected of his role.

Strengths: (1) Proactive initiative — Suresh consistently identifies opportunities and acts on them without waiting for direction. (2) Strong communication skills — his ability to articulate ideas clearly strengthens team coordination.

Areas for Improvement: (1) Punctuality scored slightly lower (8/10) — minor improvement in deadline adherence could elevate his overall rating further.

Recommendation for Next Month: Assign Suresh a team lead role for one project to develop his leadership capacity and formally recognize his high performance.

12. Conclusion

This project demonstrates that powerful, practical tools do not require coding knowledge or expensive software. By combining the structured data capabilities of Microsoft Excel with the language generation capabilities of modern Generative AI tools, a fully functional employee performance tracking and evaluation system has been built that any office worker can use from day one.

The system addresses a genuine organizational need: the gap between raw performance data (scores, attendance, targets) and the written narrative that employees, managers, and HR teams actually need for reviews, appraisals, and development conversations. Excel handles the structured data; AI handles the language. Together, they produce something neither could achieve as effectively alone.

For students of the AI Essentials with Office Administration programme, this project consolidates every major skill covered: Word for documentation, Excel for data management and analysis, and Generative AI for real-world task automation. It also demonstrates a responsible approach to AI use — the workbook explicitly reminds users that AI output must be reviewed, that personal data must be protected, and that human judgment remains central to any evaluation process.

Future Enhancements

- Integration with Microsoft Forms to allow employees to submit self-assessments, automatically feeding into the Monthly Log via Power Automate
- Addition of a 360-degree feedback column where peer scores are averaged alongside supervisor scores
- Use of Microsoft Copilot's in-Excel AI features (when available) to generate summaries directly inside the spreadsheet without switching to a browser
- Expansion to track training completion, certifications, and project outcomes as additional KPI dimensions
- A password-protected HR view that hides sensitive columns (salary, personal contact) from department managers

13. References

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