

# SAP End-User Training Document



***SAP ERP - bringing Strategy, Processes, Organisation and Technology together to improve the City***

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### Abbreviations / Definitions

Abbreviation / Term	Definition
AGSA	Auditor General of South Africa
BI	Business Intelligence
CCT / The City	The City of Cape Town
ED	Executive Director
ERP	Enterprise Resource Planning
ESO	Executive Support Officer
IDP	Integrated Development Plan
KPI	Key Performance Indicator
MayCo	Mayoral Committee
OPM	Organisational Performance Management.
OPRG	Organisational Performance Reference Group; consists of Directorate representatives.
PAS	Pilot Application Server (PAS) Database - stores KPI data on SAP
SAP	Systems, Applications and Products in Data Processing
SAP Portal	Web based version of SAP
SDBIP	Service Delivery and Budget Implementation Plans
SFA	Strategic Focus Areas (5 Pillars)
SSM	SAP Strategy Management

## How to use this Manual

*Welcome to the SSM Reporting Manual!*

### **Intended Audience**

The SSM Reporting Manual is intended as a guide to assist managers to use and navigate the SAP Strategy Management (SSM) tool.

This manual is envisioned to be used during facilitated training, as well as to provide a supplementary reference afterwards.

The SSM Training course is targeted at the following CCT management levels:

- ❖ L1: Executive Directors
- ❖ L2: Directors
- ❖ L3: Managers
- ❖ L4: Heads of Units
- ❖ Councillors

### **Pre-requisite Training & Skills**

The skills and knowledge required for the procedures in this manual include: Computer literacy, and knowledge of the SAP Portal.

### **Identifying Topics**

Step by step SAP topics are preceded with the word PROCEDURE for quick access via the [hyperlinked](#) Table of Contents; [links](#) also provide reference points. Additional information pertinent to the topic is highlighted with the following icons:



Highlights noteworthy information.



Highlights useful information / tips.

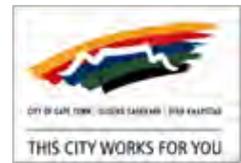
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References are indicated by [\[x\]](#), and listed in [Appendix A - References](#).



# SAP End-User Training Document SSM Reporting Manual

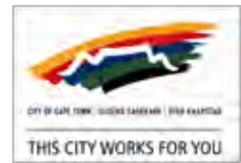


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## 2. Background

*The CCT municipality “exists to provide municipal services to all residents” (A. Ebrahim [2]).*

The City’s delivery of services is legislated nationally, as well as in local government municipal acts and policies. The City’s mandated Integrated Development Plan (IDP) incorporates the applicable legislation in the setting of its Five Year Strategic Plan. The IDP provides the strategic framework that guides the planning and budgeting over the course of a political term; it is a strong plan of action setting out what needs to be achieved under five Pillars:

- ❖ The opportunity city
- ❖ The safe city
- ❖ The caring city
- ❖ The inclusive city
- ❖ The well run city

The IDP’s five pillars are used to “focus the City’s message and purpose of delivery” (A. Ebrahim [2]). These five pillars or Strategic Focus Areas (SFA’s) inform all city plans and policies.

The City’s Vision [2] encapsulates all we strive towards, and is based on the five pillars (See Figure 1). The CCT unites all planning and strategies in a single minded promise to our citizens, that underpins all that we do ... ‘This City works for you’.

Figure 1: CCT Guiding Elements



## 2.1 IDP Process and Requirements

The IDP Process graphically represents planning, implementing, and reporting on IDP Scorecard activities, which are a statutory requirement. The Service Delivery and Budget Implementation Plans (SDBIP's) include the associated Key Performance Indicators (KPI's) and service delivery targets. These KPI's are measured and reported on in the Corporate Scorecard on a quarterly basis, and published to the public in the Annual Report.

Figure 2: The IDP Process [\[2\]](#)



## 2.2 City Reporting

At present, the City's Scorecard Reporting process involves manually capturing Key Performance Indicator (KPI) data on spreadsheets. The IDP.OPM Department and ERP Support Centre have initiated a project to automate Scorecards using the SAP Strategy Management (SSM) tool. Electronic scorecards are envisioned to replace the spreadsheets by the end of 2012.

[Appendix C - Indicator Guidelines](#) provides helpful hints for creating auditable indicators.

### 3. Organisational Performance Management (OPM)

*Performance Management* is “a series of organizational processes and applications designed to optimize the execution of business strategy” W. Eckerson [3].

*Business intelligence* (BI) is using “applications and technologies for gathering, storing, analysing, and providing access to data to help enterprise users make better business decisions” M. Rouse [3].

At the City, **Organisational Performance Management (OPM)** refers to “the area of Business Intelligence (BI) involved with monitoring and managing an organization's performance, according to Key Performance Indicators (KPIs)” M. Rouse [3].

In short, the goal is using technology to support business strategies. The IDP uses five pillars to define the CCT's objectives. The Corporate Scorecard uses KPI's to measure the performance of those objectives. The SAP Strategic Management (SSM) tool assists with the performance management process by gathering SAP data for measurement against the necessary KPI's.

#### 3.1 OPM Issues

“Gartner is a leading information technology research and advisory company, providing technology related insight [3]”. A recent Gartner article states: “fewer than 30 percent of business intelligence initiatives will align analytic metrics completely with enterprise business drivers by 2014”. Gartner further posits that “the foremost BI challenge is to align initiatives with corporate strategy and objectives” [3].

Studies therefore show that many organisations don't make use of the available analytics; analytics are not aligned to business processes, and these in turn are not aligned to corporate strategy. Through the deployment of SSM we aim to address this.

Figure 3: OPM Issues [3]



### 3.2 Cascading Goals

To overcome the OPM issues mentioned above, the City makes use of *Cascading Goals*, which align goals at all organisational levels. In the City's case, the goals cascade from the IDP objectives, which should inform the setting of all business objectives in Directorate goals, which in turn inform Department / Team goals, and are followed through to individual goals.

The alignment of goals is critical for aligning the associated business objectives, and the supporting operational processes. The performances of these objectives are measured in the Departmental and Directorate Scorecards, and the final results published in the Corporate Scorecards.

Figure 4: Cascading Goals



*"Checking the results of a decision against its expectations shows executives what their strengths are, where they need to improve, and where they lack knowledge or information" Peter F. Drucker [1].*

Analysing the performance of business objectives goes hand in hand with setting goals. Analytics provide the necessary information which guides decision making and subsequent growth initiatives to improve performance. SAP Reporting at the City offers Operational, Tactical and Strategic reports. SSM Falls under Strategic Reporting (Dashboards).

Figure 5: Reports and Dashboards



### 3.3 How does SSM assist with OPM and IDP objectives?

As a CCT executive, you will be reporting on the performance of IDP objectives. The SAP Strategy Management (SSM) tool provides a central platform for collating, measuring and monitoring CCT OPM data from the ground up, informing the final published Corporate Scorecard results.

By using SSM to manage the vast amount of operational information that informs performance results, you can 'manage your business', customise items to monitor, and incorporate existing live SAP BI data in your final reports.

The SSM tool aids IDP objectives as follows:

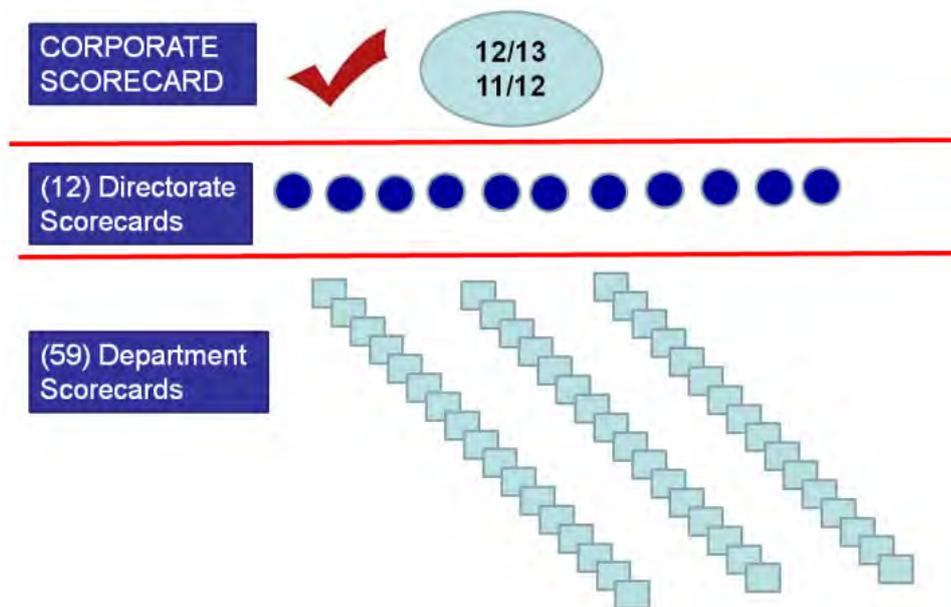
- ❖ Makes tracking Objectives and KPI's more effective and timely.
- ❖ Improves the visibility of performance measures.
- ❖ Facilitates the fostering of a performance culture at the City, whereby organisational performance management is used to cultivate a focussed effort, and doesn't simply exist for legislative compliance.
- ❖ Creates a platform for common reporting on all information.
- ❖ Automated KPI's reduce reporting time and improve accuracy.
- ❖ Auditing principles are accommodated by centrally controlling the opening and closing of reporting periods, providing an audit trail, and recording management approvals.
- ❖ Strategic information is visually available as and when required for monitoring and progress reports. Report creation time is dramatically reduced, and usability for strategic decisions is increased.
- ❖ Reasons for results variance, and the remedial action to rectify the variance, can be posted in comments and accessed centrally, providing a single frame of reference

### 4. SSM Scorecard Concepts Overview

#### 4.1 SSM Scorecard Types

CCT plans to deploy three levels of Scorecards: 'Corporate Scorecards', 'Directorate Scorecards', and 'Department Scorecards'. The City's Corporate Scorecard has been built. The next phase is to extend the build to the 12 Directorate Scorecards, and thereafter the 59 Department Scorecards.

Figure 6: Scorecard Types



#### ***Department and Directorate Scorecards***

Each Department will have a Scorecard, whose results will automatically be rolled up to the relevant Directorate Scorecard. Department and Directorate Scorecards will be implemented and maintained within the Directorate, and be governed by internal timelines for opening and closing periods.

Directors or Managers are responsible for approving Directorate scorecards. In some cases, Directorate results are directly transposed to the Corporate Scorecard.



Table 1: SSM Roles

Role Name	Description
SSM Reporting	Users of the SSM Tool.
SSM Capturer	Responsible for capturing validated data (per indicator) into the SSM Tool.
SSM Approver	Responsible for approving data captured for each indicator; is accountable for the accuracy and validity of the data and evidential documentation, as well as the remedial action and reason for variance notes.
SSM Indicator Builder	Responsible for creating and maintaining KPI's.
SSM Administrator	Open/Closes Scorecard periods; releases Metric sets.

### ***Directorate and Department Scorecard Maintenance***

In Directorate and Department Scorecard Maintenance, the *SSM Administrator* will open Scorecard periods, and release the relevant metric sets. A notification is sent via email to the *SSM Capturer*, who captures Scorecard data. Once data capture is concluded, an email is sent to the *SSM Approver* for approval of the Scorecard results.

Once all *SSM Approver* approvals are complete, the *SSM Administrator* will close the period, and load the final results to the Pilot Application Server (PAS) Database, making them accessible from SSM.

### ***Corporate Scorecard Maintenance***

In Corporate Scorecard maintenance, the *SSM Administrator* role is handled centrally by the IDP.OPM department.

The *SSM Capturer* role is usually assigned to the individual responsible for managing the progress of the relevant KPI's, i.e. a high level operational role commensurate with the associated accountability, not a data capture function.

The *SSM Capturer* and *SSM Approver* roles should be assigned to different individuals to maintain auditing integrity. Executive Directors will be required to approve the 'Authorisation template' for these roles, which are stored centrally on the [IDP SharePoint site](#).

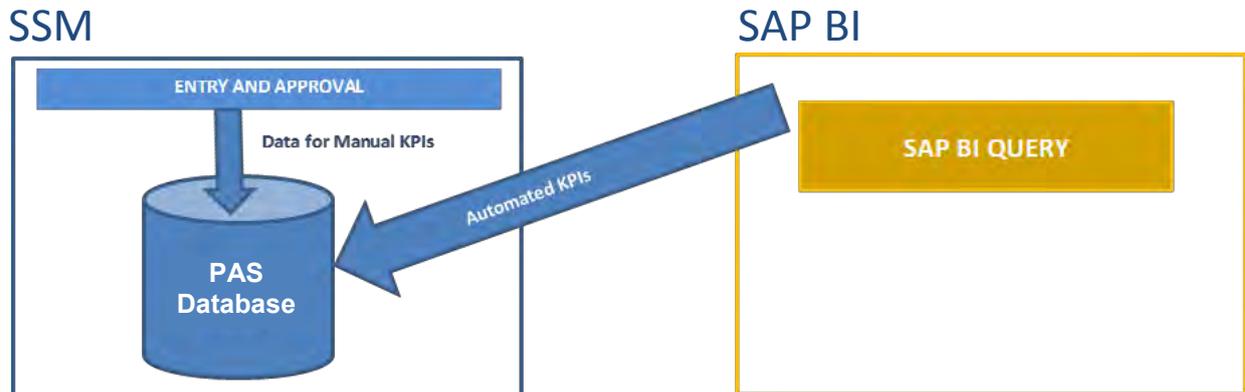


All approvals must be completed to close a Scorecard period.

### 4.4 SSM Indicator Types

The Corporate Scorecard consists of Automated and Manual Key Performance Indicators (KPI's).

Figure 8: Automated and Manual KPI's



The above model illustrates the interaction between SSM (SAP Strategy Manager), SAP BI (Business Intelligence), and the Pilot Application Server (PAS) Database.

- ❖ SAP BI data is imported into the PAS Database for *Automated KPI's*, via SAP BI query.
- ❖ In SSM, data for *Manual KPI's* is captured via the Entry and Approval tool (See PROCEDURE Capture, Approve and Edit Metrics (KPI's)).
- ❖ Once approved, the SSM Administrator “Loads the PAS Database” which writes the captured values into the PAS Database.

The PAS Database therefore stores all KPI data for manual and automated KPI's. Corporate Scorecard data accessed via SSM is retrieved from the PAS Database.

#### **Automated KPI's**

Automated KPI's contain live SAP data sourced from SAP BI. A project is currently underway to automate more Corporate Scorecard KPI's such as Repairs and Maintenance.

The 2011-2012 Corporate Scorecard currently contains the following automated KPI's:

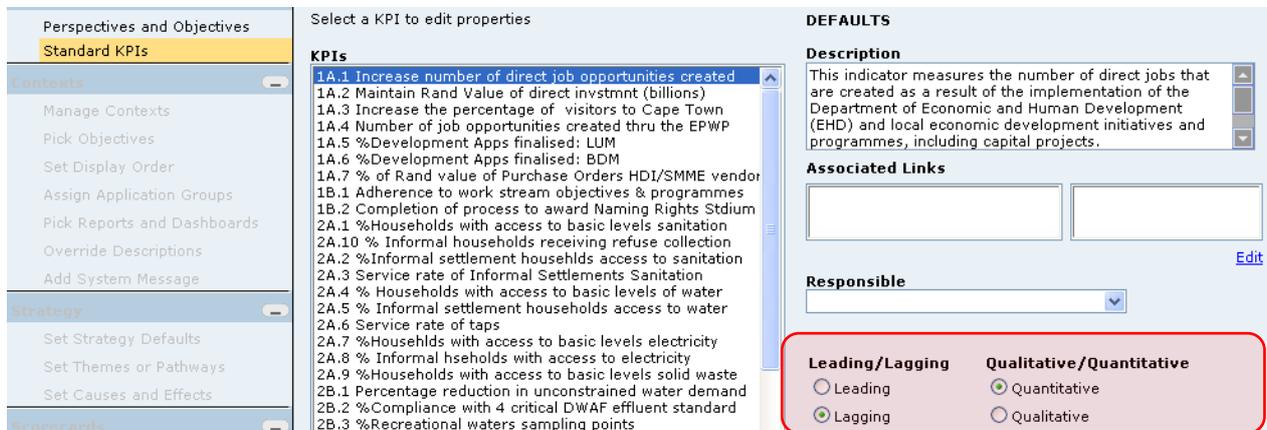
- ❖ 1A.1 Capital budget spend (Billions)
- ❖ 8B.3 Percentage of City's Capital budget spent (NKPI)
- ❖ 8A.2 % Improvement of responsiveness in service delivery

#### **Manual KPI's**

Manual KPI's involve manually entering KPI data into Scorecards.

### 4.5 SSM Indicator Attributes

Figure 9: KPI Attributes



Perspectives and Objectives

Select a KPI to edit properties

Standard KPIs

Contexts

Manage Contexts

Pick Objectives

Set Display Order

Assign Application Groups

Pick Reports and Dashboards

Override Descriptions

Add System Message

Strategy

Set Strategy Defaults

Set Themes or Pathways

Set Causes and Effects

Scorecards

KPIs

1A.1 Increase number of direct job opportunities created

1A.2 Maintain Rand Value of direct investmnt (billions)

1A.3 Increase the percentage of visitors to Cape Town

1A.4 Number of job opportunities created thru the EPWP

1A.5 %Development Apps finalised: LUM

1A.6 %Development Apps finalised: BDM

1A.7 % of Rand value of Purchase Orders HDI/SMME vendor

1B.1 Adherence to work stream objectives & programmes

1B.2 Completion of process to award Naming Rights Stadium

2A.1 %Households with access to basic levels sanitation

2A.10 % Informal households receiving refuse collection

2A.2 %Informal settlement households access to sanitation

2A.3 Service rate of Informal Settlements Sanitation

2A.4 % Households with access to basic levels of water

2A.5 % Informal settlement households access to water

2A.6 Service rate of taps

2A.7 %Househlds with access to basic levels electricity

2A.8 % Informal hseholds with access to electricity

2A.9 %Households with access to basic levels solid waste

2B.1 Percentage reduction in unconstrained water demand

2B.2 %Compliance with 4 critical DWAF effluent standard

2B.3 %Recreational waters sampling points

DEFAULTS

Description

This indicator measures the number of direct jobs that are created as a result of the implementation of the Department of Economic and Human Development (EHD) and local economic development initiatives and programmes, including capital projects.

Associated Links

Responsible

Leading/Lagging

Qualitative/Quantitative

Leading

Lagging

Quantitative

Qualitative

When Key Performance Indicators (KPI's) are defined, they are given attributes that categorise them as Leading or Lagging, and Qualitative or Quantitative.

A **Lagging Indicator** is quantitative, and *describes a past scenario*, i.e. describe what has already happened, with no option to change the outcome.

- ❖ They are based on historical financial and other backwards-looking data.
- ❖ They provide an important view of how an organisation has performed until now.
- ❖ They offer little visibility into how an organisation will perform moving forward.

A **Leading Indicator** is qualitative, and *describes a future scenario*, e.g. Customer Satisfaction.

- ❖ They are “early warning” signals predicting the outcome of related lagging indicators.
- ❖ They help forecast future performance, giving critical insight into how today's decisions will impact tomorrow's performance.
- ❖ They provide an opportunity to address issues if necessary.

A KPI that is assigned the **Quantitative** attribute indicates the results consist of indisputable facts, whereas **Qualitative** KPI's are subjective, i.e. the results are from surveys etc.

### 4.6 SSM Indicator Evidence

It is required to store evidence supporting Key Performance Indicator (KPI) results.

- ❖ High level documents such as signed off Summary sheets are stored in a central repository ([IDP SharePoint site](#)).
- ❖ Source evidence such as application forms etc. are stored within Departmental repositories. Should this source evidence be requested by the Office of the Auditor General of South Africa (AGSA), it must be produced within three days.

What constitutes acceptable evidential documentation is individually defined in each Directorate's Performance Information Measurement Sheet (PIMs), which is managed by the Directorate OPRG (Organisational Performance Reference Group) representative.

Once a period is open for capturing, a secondary email is generated requesting that evidential documentation supporting each KPI be uploaded to the relevant indicator folder on the [IDP SharePoint site](#). The IDP Administrator links this evidence to the relevant KPI in SSM, under '**Associated Links**'.



In Directorate and Department Scorecards, the *SSM Administrator* is responsible for linking evidential documentation under 'Associated Links' on SSM.

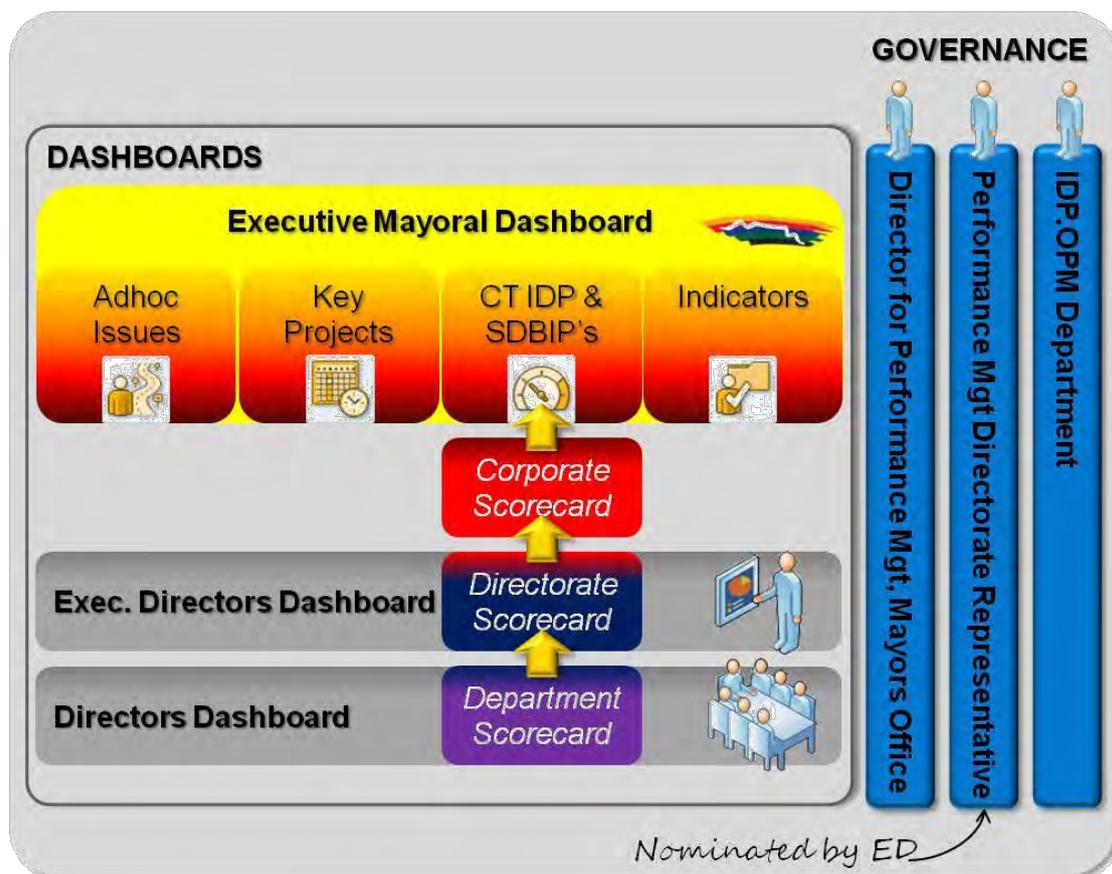
### 5. Corporate Dashboards

The City uses various Dashboards to track and report on operational issues, and Key Performance Indicators (KPI's).

The *Executive Mayoral Dashboard* will be used by the City's leadership to track deliverables contained within the IDP and SDBIPs, as well as ad-hoc issues and key projects to be identified by the Executive Mayor. It provides a vehicle for long term tracking of existing KPI's under 'CT IDP & SDBIP's', and new KPI's under 'Indicators'. Short term tracking is accommodated by monitoring 'Adhoc issues' that arise during the year, and the monitoring of 'Key Projects'.

*Executive Directors Dashboards* and *Directors Dashboards* will also be developed to provide the same tracking capability for Executive Directors and Directors. The governance of Dashboards is a collaborative effort, shared between the IDP.OPM Department, a Performance Management Directorate representative (nominated by the ED), and the Director of Performance Management, Mayor's Office.

Figure 10: CCT Dashboards



The following sections provide further insight into the Executive Mayoral Dashboard items.

### 5.1 Executive Mayoral Dashboard: Accessing

The Executive Mayoral Dashboard is accessible via the SAP Portal:

- ❖ **Location:** [CITYweb](#) Intranet > SAP Portal > Corporate Dashboards > Enterprise Performance Management > Executive Mayoral Dashboard

Figure 11: Access Executive Mayoral Dashboard

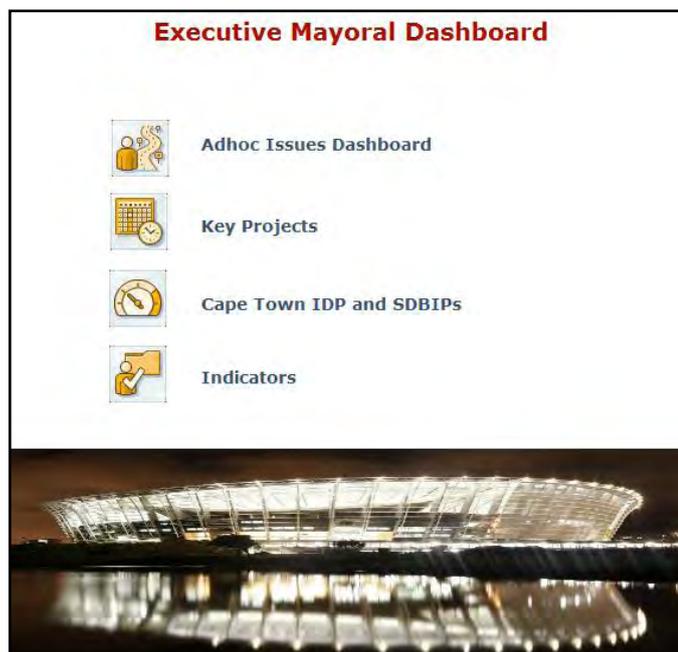


**note** The SAP Portal “Enterprise Performance Management” refers to the City’s Organisational Performance Management (OPM).

The Executive Mayoral Dashboard is a portal to access information relating to the following:

- ❖ **Adhoc Issues Dashboard:** Issues are listed and tracked by Directorate.
- ❖ **Key Projects** are listed and tracked by Directorate.
- ❖ **Cape Town IDP and SDBIPs** provides access to all SSM Scorecard Types.
- ❖ **Indicators** provides access to indicators not addressed in SDBIP’s.

Figure 12: Executive Mayoral Dashboard



### 5.2 Executive Mayoral Dashboard: Adhoc Issues Dashboard

'Adhoc Issues Dashboard' links to a SharePoint site, which contains a folder for each Directorate, and individual spreadsheets containing a status update of key issues as they relate to each Directorate.

The spreadsheet is updated with feedback, and reported on at quarterly Dashboard sessions. It is populated by the responsible staff member as described below, and does not justify automation. The spreadsheet is designed by the Mayor's office, and contains three sections which are further detailed below.

#### Section A: Political Oversight Reporting

This section of the spreadsheet contains a list of generic issues against which the responsible MayCo (Mayoral Committee) member reports. The respective Executive Support Officer (ESO) is responsible for populating this section.

#### Section B: General Management Reporting

This section of the spreadsheet contains a list of generic issues against which the responsible ED reports. This section is maintained by the Performance Management Directorate representative, who is nominated by the ED. In most cases, this section is a summation of information reflected as a single dashboard indicator. Most of the source data would be accessible from the Executive Mayoral Dashboard, under one of the available links (Key Projects, Cape Town IDP and SDBIPs, Indicators).

#### Section C: Issues Reporting

Ad-hoc issues will be identified for inclusion by the Executive Mayor, and listed in this section of the spreadsheet by her office. Each Directorate will be responsible for providing feedback on the progress of the identified issue (Action required, target date, progress, meeting notes and recommended remedial action).

As this section contains a consolidated view of the status of political and management KPI's and ad-hoc issues, it can be viewed as being the agenda or the framework for the Executive Mayoral Performance Review Sessions. It provides the summary, with the underlying detail and supporting documentation being available under one of the other Executive Mayoral Dashboard links (Key Projects, Cape Town IDP and SDBIPs, Indicators).

Figure 13: Executive Mayoral Dashboard - Adhoc Issues

CITY OF CAPE TOWN MAYORAL REPORTING DASHBOARD						
DIRECTORATE: CORPORATE SERVICES						28 August 2012
ITEM NO	ISSUE DESCRIPTION	ACTION REQUIRED	TARGET DATE	NOTES RECORDED AT PREVIOUS DASHBOARD SESSION ON 14 AUGUST 2012	PROGRESS	EXPLANATORY NOTES/ COMMENTS/ DIRECTIVES FROM MAYOR'S OFFICE/ RECOMMENDED REMEDIAL ACTION
<b>POLITICAL OVERSIGHT REPORTING (Reports to be submitted 7 days before Dashboard Meeting)</b>						
MAYOR: MEMBER: AID DEMETRI GQUALI TEL NO: 021-4501299 CELL NO: 0834911326						
1	New Policy developed Existing Policies amended	New applicable policies to be developed & existing policies reviewed	NA		D	Not Report
2	New By-Laws developed Existing By-Laws amended	New applicable policies to be developed & existing policies reviewed	NA		D	Not Report
3	MP's arising from monthly CP Monitoring	Written report on Deviations to be submitted to Mayor's office by ESO	31-Jul-12		C	Completed
4	MP's arising from monthly SDBIP Monitoring	Written report on Deviations to be submitted to Mayor's office by ESO	31-Jul-12		C	Completed
5	Decisions taken by Mayor's Member to Delegated Powers	Written report to be submitted to Mayor's office by ESO	31-Jul-12		C	Completed
6	Meetings with inter-departmental committees	Written report to be submitted to Mayor's office by ESO	31-Jul-12		C	Completed
7	Meetings with external organisations	Written report to be submitted to Mayor's office by ESO	31-Jul-12		C	Completed
8	Virements approved	Written report to be submitted to Mayor's office by ESO	31-Jul-12		C	Completed
9	Media statements/ liaison with press	Written report to be submitted to Mayor's office by ESO	31-Jul-12		C	Completed
10	External matters negatively affecting Council	Written report to be submitted to Mayor's office by ESO	31-Jul-12		C	Completed
11	Internal matters negatively affecting Council	Written report to be submitted to Mayor's office by ESO	31-Jul-12		C	Completed
<b>GENERAL MANAGEMENT REPORTING (Reports to be submitted 7 days before Dashboard Meeting)</b>						
EXECUTIVE DIRECTOR: MRS FATIMA HABIB TEL NO: 021-4505650 CELL NO: 0827884974 FAX: VACANT TEL NO: 021-4501231						
12	Report progress on SDBIP implementation	Written report on Deviations to be submitted to Mayor's office by ED	31-Jul-12		C	Completed
13	Report progress on Open budget	Written report on Deviations to be submitted to Mayor's office by ED	31-Jul-12		C	Completed
14	Report progress on Capex budget	Written report on Deviations to be submitted to Mayor's office by ED	31-Jul-12		C	Completed
15	Vacancies	Total: Director: Managers:	31-Jul-12		C	WIP

### 5.3 Executive Mayoral Dashboard: Key Projects

'Key Projects' links to a SharePoint site which contains a folder for each Directorate, and individual spreadsheets containing information relating to projects identified as being significant, and needing to be tracked at the Executive Level. The spreadsheet contains the planned budget and completion date for each project, as well as a comparison of planned versus actual spend.

Figure 14: Executive Mayoral Dashboard - Key Projects

CITY OF CAPE TOWN										
Executive Mayor's Dashboard No Directorate Key Projects for 2011/2012 Directorate: City Health *Review Date: 05 September 2011										
Project Name	Planned Completion Date	Budget Provision	Planned Spend as at Review Date *		Actual Spend as at Review Date *		% Project Physical Completion as at Review Date		Notes / Comments / Actions	
			R	C	R	C	Planned %	Actual %		
				%		%				
khwezi Clinic extensions	30.06.2013	R 20 000	R	0	R	-	#DIV/0!	90%	95%	Progress on site has improved with facility of roof height. Cash flows and submission of certificates is still disappointing. The consultants and contractor have been requested to stick to the schedule set up during last financial year.
New Eerste River clinic	30.08.2013	R 5 200 000	R	1 000 000	R	19%	8%	80%	75%	
New Eerste River clinic	30.06.2013	R 4 210 000	R	-	R	0%	#DIV/0!	80%	76%	
Dr Torms Clinic	30.06.2013	R 800 000	R	-	R	0%	#DIV/0!	10%	10%	
Bluedowns Clinic	30.06.2013	R 800 000	R	-	R	0%	#DIV/0!	5%	5%	
Nibow Gardens clinic upgrade	30.06.2012	R 200 000	R	-	R	0%	#DIV/0!	60%	60%	

### 5.4 Executive Mayoral Dashboard: Cape Town IDP and SDBIPs

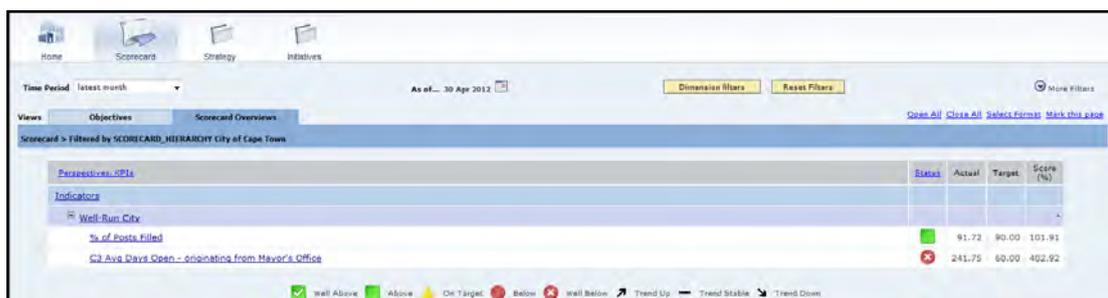
Department, Directorate and Corporate Scorecards will all inform the 'Cape Town and IDP and SDBIPs' Executive Mayoral Dashboard item. Department Scorecard results will automatically be rolled up to the relevant Directorate Scorecard. Directorate Scorecard results are then transposed into the Corporate Scorecard.

All scorecards are accessible from the Executive Mayoral Dashboard. The Executive Mayoral Dashboard items are monitored by the CCT Mayor and Executives. Electronic scorecards therefore have high visibility and provide a single view of how the City is doing on delivering against its mandate received from its citizens. See [Figure 10: CCT Dashboards](#).

### 5.5 Executive Mayoral Dashboard: Indicators

This link provides access to key indicators not addressed in SDBIP's, but identified as needing to be tracked. These indicators may change from time to time, current examples include absenteeism, vacancy rates etc. They can be captured manually or automated.

Figure 15: Executive Mayoral Dashboard - Indicators



Indicator	Status	Actual	Target	Score (%)
% of Posts Filled	Well Above	91.72	90.00	103.91
City Aged Days Open - originating from Mayor's Office	Well Below	241.75	60.00	402.92

## 6. PROCEDURE General Information

*"Education is knowing where to go to find out what you need to know; and it's knowing how to use the information you get." William Feather [1].*

Step by step SSM procedures are individually detailed in the following chapters (identified by the prefix PROCEDURE). The SAP Elements, Scorecard Menu Elements, and Illustrated Scenarios used in the procedures are detailed below.

### 6.1 Before you start

Before using the SSM procedures, please ensure you have the appropriate SAP Portal access. This includes: having Internet Explorer installed, a valid SAP Portal username and password, and the SSM user authorisation role.

### 6.2 SAP Elements

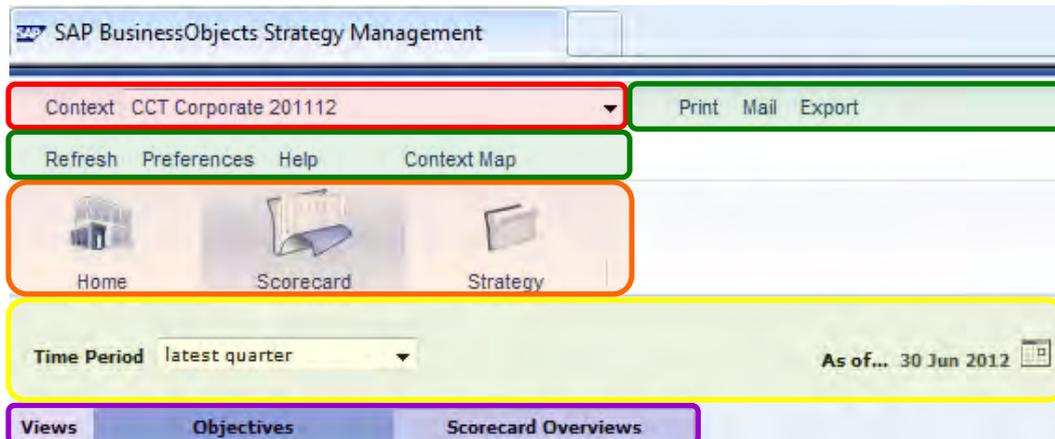
The below items are used in the procedures to indicate various SAP elements.

Table 2: SAP Elements

Procedure Element	Used to indicate ...
<b>Menu &gt; Path</b>	Indicates a SAP Portal Menu Path e.g. <b>Home &gt; Work</b>
<b>Page Name</b>	Indicates the selected SAP Portal page e.g. <b>Home &gt; Work &gt; Universal Worklist</b>
<b>Tab Name</b>	Indicates a SAP Portal Tab, e.g. 
<b>View Name</b>	Indicates a selected SAP Portal View.
<b>Section Heading</b>	Indicates a SAP Portal section heading.
<a href="#">Link</a>	Indicates a link available in SAP Portal (not directly hyperlinked).
1. Procedure Step. o Procedure sub-step	Each step is numbered 1. 2. etc. Procedure sub-steps are marked with bullets.
<b>Field Name</b>	Indicates a SAP Portal field label.
<input type="text" value="Field value"/>	Indicates a SAP Portal field value.
<input type="button" value="OK"/>	SAP Portal buttons (E.g. 'OK') are indicated where possible.
<b>System Message</b>	Indicates a SAP Portal system message.
<Comment>	< > Indicates variable entries.

### 6.3 Scorecard Menu Elements

Figure 16: Scorecard Menu Elements



The **SAP BusinessObjects Strategy Management** (SSM Scorecard) page menu elements are briefly listed below for ease of reference in the procedures.

- ❖ **Context selection** (See PROCEDURE Set Scorecard Selections).
- ❖ **Menu Items** (See PROCEDURE Access SSM).
- ❖ **Scorecard Tabs**
- ❖ **Time Period / Date Selections** (See PROCEDURE Set Scorecard Selections).
- ❖ **Views**

### 6.4 Illustrated Scenarios

The SAP Strategy Management (SSM) tool encompasses both Corporate and Directorate scorecards. The Corporate Scorecard is used to illustrate SSM functionality and navigation, with a specific focus on the Responsiveness indicator.

Illustrative example items to be used:

- ❖ Context: CCT Corporate 201112
- ❖ Perspective: A Well-run City
- ❖ Objective: 5.2 Efficient and productive admin to prioritise delivery
- ❖ KPI: 8A.2 % Improvement of responsiveness in service delivery

The relative 2012-2013 KPI will also be introduced, and used in the assessment:

- ❖ Context: CCT Corporate 201213
- ❖ Perspective: An inclusive City
- ❖ Objective: 4.1 Create environment for citizens to be communicated with.
- ❖ KPI: 4.A %Adherence to Citywide service std - external notif.

## 7. PROCEDURE Access SSM

- ❖ **Purpose of Procedure:** Access SAP Strategy Management (SSM) via the SAP Portal.
- ❖ **Location:** [CITYweb](#) Intranet > SAP Portal > Corporate Dashboards > Enterprise Performance Management > SAP Strategy Management



The SAP Portal “Enterprise Performance Management” refers to the City’s Organisational Performance Management (OPM).

This procedure includes the following:

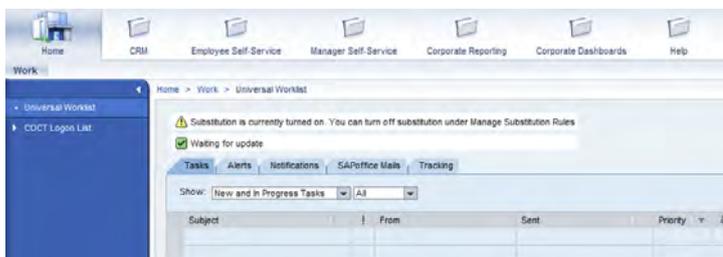
- [Access SSM](#)
- [Proceed to the Corporate Scorecard](#)
- [Variable: Proceed to the Directorate Scorecard](#)
- [Exit SSM](#)
- [Exit the SAP Portal](#)

### Access SSM

1. On the computer start bar, select Internet Explorer.
2. The default [CITYweb](#) Intranet web page appears.
  - o On the right of the screen, under **Applications**, click .
3. The Welcome to the SAP Portal page appears.



- o Enter your **User ID** and **Password**, click .
4. The **Universal Worklist** page appears.



**Home > Work > Universal Worklist** is displayed by default.

- o At the top of the page, click **Corporate Dashboards**.

- The **Service Map** page appears.

 <p><b>Enterprise Performance Management</b> <a href="#">SAP Strategy Management</a></p>  <p><b>Human Resources</b> <a href="#">HR Dashboard</a></p>	 <p><b>Logistics</b> <a href="#">Electrical Support Services Dashboard</a> <a href="#">Specialised Electronic and Radio Services Dashboard</a> <a href="#">Milestone Dashboards</a></p>  <p><b>Corporate Works Management Process</b> <a href="#">C3 Notifications – Overall City View</a> <a href="#">C3 Notifications – Sub-Council &amp; Ward View</a> <a href="#">C3 Notifications – Individual Directorate View</a></p>
--	--



**Corporate Dashboards > Service Map** is displayed by default.

- Under **Enterprise Performance Management**, select [SAP Strategy Management](#).

- The **SAP Strategy Management** page appears.

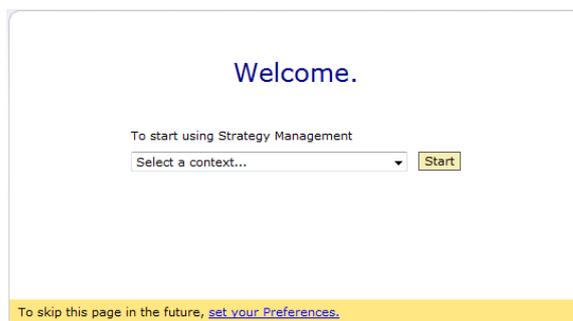


The currently selected Menu Tab is depicted as an open folder



### Proceed to the Corporate Scorecard

- In the **SAP Strategy Management** page.
  - Click  **City of Cape Town**.
- At your first login, the **Welcome** page appears.



- At the top right of the page, click  **Maximise**.
- Click [set your Preferences](#) to change your default starting point.



This only needs to be done once, and can be changed at any time from the SSM Scorecard Menu, under **Preferences**. After your first login, skip steps 8, 9, 10, 11.

9. The **SM - Set Preferences** window appears; under **Set Starting Point**:

- o Select **Default Tab** to skip the Welcome page in future.

- o **Set Default Context:**

- Click , select a **Context** for the current financial year.



The context is defined by financial periods. E.g. **CCT Corporate 201112** refers to the 2011-2012 financial year (1 July 2011 to 30 June 2012).

- Click , select **Scorecard**.

- o Click .

10. A system message appears: **User preferences saved; changes will take effect the next time you start the application.**

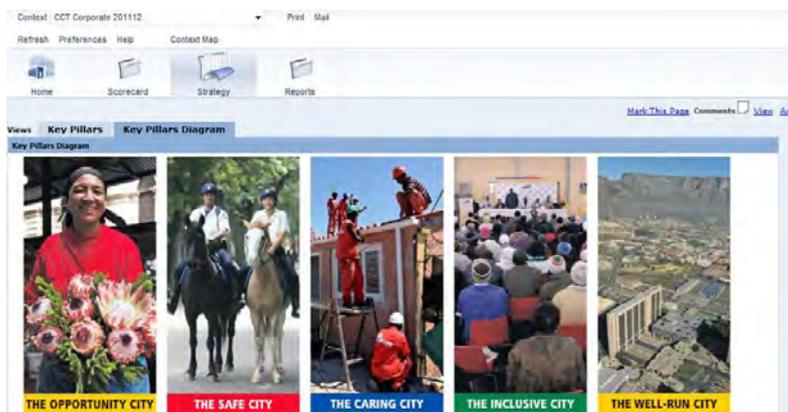
- o Click .

11. You are returned to the **Welcome** page, click .



The **Welcome** page will not appear when you next login.

12. The **SAP BusinessObjects Strategy Management** (SSM Scorecard) page appears.



- o Proceed with the desired action.

### Variable: Proceed to the Directorate Scorecard

1. Access SSM.
2. In the **SAP Strategy Management** page:
  - o Click on the desired Directorate (e.g.  **Community Services** ).



You are able to view all Directorate scorecards, but only administer your own.

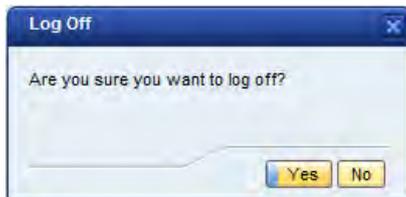
3. The **SAP BusinessObjects Strategy Management** (SSM Scorecard) page appears.
  - o At the top right of the page, click  **Maximise**.
  - o Proceed with the desired action.

### Exit SSM

1.  **Close** any open SSM Scorecard pages.
2. The open **SAP Strategy Management** page remains open.
  - o Select a Menu tab to proceed.

### Exit the SAP Portal

1. To exit the SAP Portal, click  **Log Off** at the top right of the page.
  - o A system message appears: **Are you sure you want to log off?**



- o Click .
2. You are returned to the **Welcome to the SAP Portal** page,
  - o Click  **Close**.

## 8. PROCEDURE Set Scorecard Selections

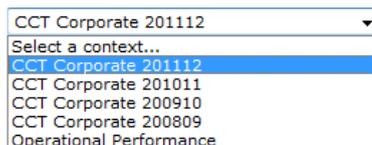
- ❖ **Purpose of Procedure:** Setting basic Scorecard selections.
- ❖ **Location:** [CITYweb](#) Intranet > SAP Portal > Corporate Dashboards > Enterprise Performance Management > SAP Strategy Management.

### Set Scorecard Selections

1. Access SSM, in the **SAP Strategy Management** page, select a Scorecard.
2. The **SAP BusinessObjects Strategy Management** (SSM Scorecard) page appears.
  - o At the top right of the page, click **Maximise**.

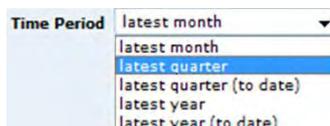
3. Click **Scorecard** Tab.

4. Select the **Context** (financial period).
  - o Click , select the desired item.



The **Context** is defined by financial periods. E.g. CCT Corporate 201112 refers to the 2011-2012 financial year (1 July 2011 to 30 June 2012).

5. Select the **Time Period** (within the selected **Context**).
  - o Click , select the desired item.



E.g. latest quarter shows current data for the selected context (financial year).

6. Select the appropriate **As of ...** date (within the selected **Time Period**).



- o Click **Calendar**, the **SM - Calendar** window appears.
- o Click on the appropriate month end date (E.g. **30 Jun 2012**).
- o The selected date will be displayed next to **As of ...**



E.g. If selected **Context** is CCT Corporate 201112, and selected **Time Period** is latest quarter, the Date should be set to 30 June to include data up to the end of the last quarter.

## 9. PROCEDURE SSM Scorecard Page: General Navigation

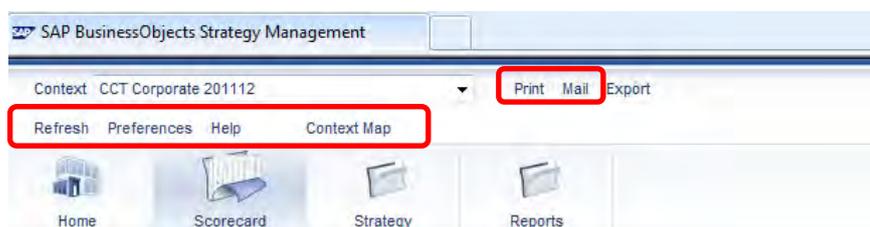
- ❖ **Purpose of Procedure:** Navigate general SSM Scorecard Menu items.
- ❖ **Location:** [CITYweb](#) Intranet > SAP Portal > Corporate Dashboards > Enterprise Performance Management > SAP Strategy Management.
- ❖ **Scenario Selections:**
  - Corporate Scorecard: City of Cape Town ; Context: CCT Corporate 201112

This procedure includes the following:

- SSM Scorecard Menu: Refresh
- SSM Scorecard Menu: Preferences
- SSM Scorecard Menu: Help
- SSM Scorecard Menu: Context Map
- SSM Scorecard Menu: Print / Mail
- SSM Scorecard Menu: Mark this page

### Access SSM Scorecard

1. Access SSM, in the **SAP Strategy Management** page, click City of Cape Town .
2. The **SAP BusinessObjects Strategy Management** (SSM Scorecard) page appears.



- o At the top right of the page, click *Maximise*.
- o Ensure the **Context**, **Time Period** and **As of ...** date are set appropriately.



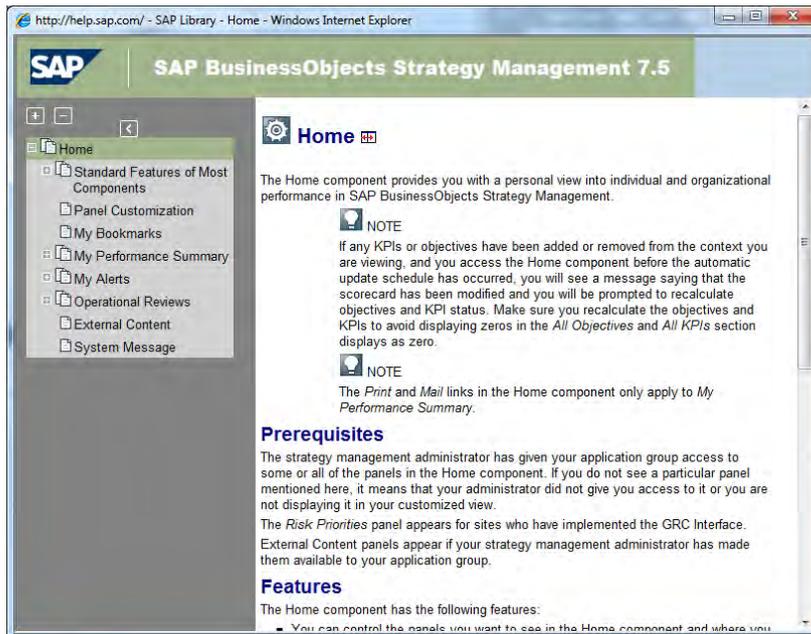
See PROCEDURE Set Scorecard Selections.

3. Each of the available general SSM Scorecard menu options are detailed individually below.
  - o This includes menu options displayed as **links** above the SSM Scorecard Tabs, as well as the [Mark This Page](#) function.



### SSM Scorecard Menu: Help

1. Access SSM Scorecard, in the SSM Scorecard page.
2. To access SAP Help:
  - o Click **Help** on the SSM Scorecard Menu.
3. The **SAP Library - Home** window appears.



- o Browse Help Categories under **Home**.



Expand / contract topics using buttons.

4. To exit the **SAP Library - Home** window:

- o Click **Close**.

### SSM Scorecard Menu: Context Map

1. Access SSM Scorecard, in the SSM Scorecard page.
2. To navigate quickly to different SSM Scorecard pages:
  - o Click **Context Map** on the SSM Scorecard Menu.
3. The Context Map window appears.

Choose an icon below to jump to the associated tab or view associated information

[Expand All](#) [Collapse All](#) [Search](#)

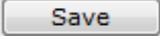
CCT Corporate 201112					
CCT Corporate 201011					
CCT Corporate 200910					
CCT Corporate 200809					
Operational Performance					

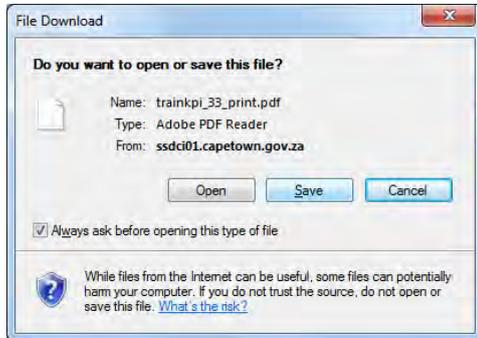
- o The available Contexts are shown on the left, with the associated quick links for each:
    - Jump to Home tab
    - Jump to Strategy tab
    - Jump to Scorecard tab
    - View associated links
    - View comments
4. To exit the **Context Map** window:
    - o Click or *Close*.



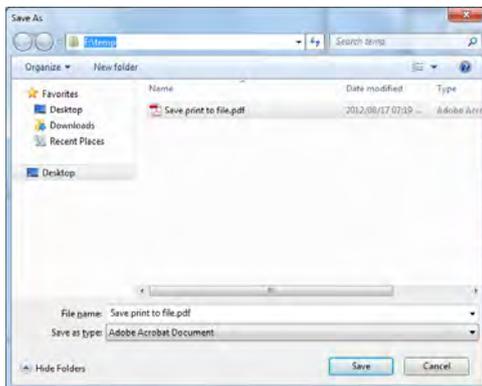


Your Internet Explorer settings may differ, saving files directly to a pre-defined location. You may therefore not see the **File Download** or **Save As** windows.

- o If a **File Download** window appears, click .



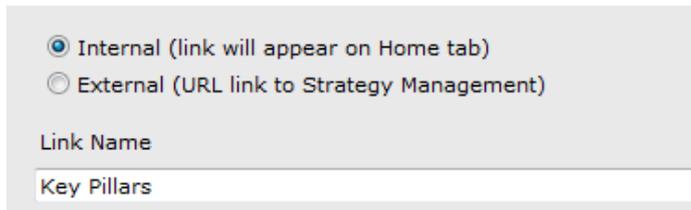
- 5. If a **Save As** window appears.



- o The **File name** is defaulted <username\_print>.
  - o Browse to the folder you wish to save the file in.
  - o Click .
- 6. The file is saved as a pdf file to your pc.
    - o When a file is downloaded, a blank --- **Webpage Dialog** window is opened.
    - o Click  to close it.

### SSM Scorecard Menu: Mark this page

1. Access SSM Scorecard, in the SSM Scorecard page.
2. To create a bookmarked link:
  - o Click [Mark This Page](#).
3. The **Create Link** window appears.



- o Select  **Internal** to create a saved bookmark on the Scorecard **Home** tab.
  - o In **Link Name**, type in a bookmark description (E.g. Key Pillars).
  - o Click .
4. A system message appears: **Link saved**
  - o Click .
5. The newly created link (E.g. Key Pillars) is now available in the **Home** tab, under **My Bookmarks**.



o

## 10. PROCEDURE Scorecard Tab: Navigation

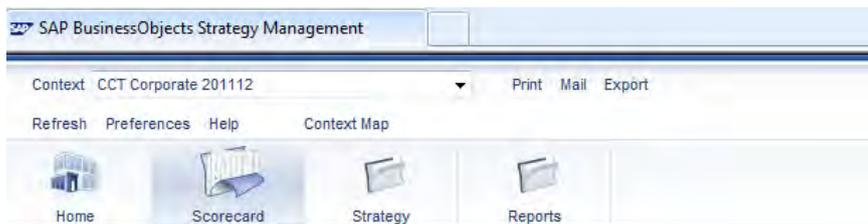
- ❖ **Purpose of Procedure:** Navigate general Scorecard Tab menu items
- ❖ **Location:** [CITYweb](#) Intranet > SAP Portal > Corporate Dashboards > Enterprise Performance Management > SAP Strategy Management.
- ❖ **Scenario Selections:**
  - Corporate Scorecard: City of Cape Town ; Context: CCT Corporate 201112

This procedure includes the following:

- Scorecard Tab: Export
- Scorecard Tab: Add Comments
- Scorecard Tab: View Comments
- Scorecard Tab: Filtering

### Access Scorecard Tab

1. Access SSM, in the **SAP Strategy Management** page, click City of Cape Town .
2. The **SAP BusinessObjects Strategy Management** (SSM Scorecard) page appears.

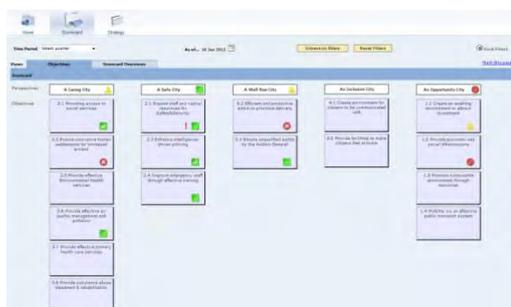


- o At the top right of the page, click Maximise.
- o Ensure the **Context**, **Time Period** and **As of ...** date are set appropriately.



See PROCEDURE Set Scorecard Selections.

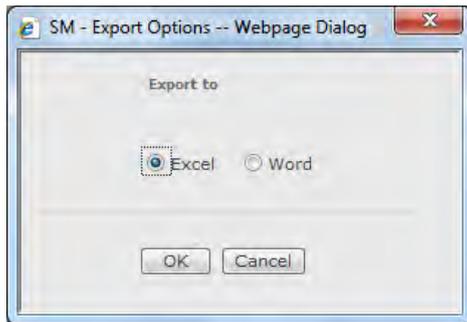
3. Click **Scorecard Tab**.



- o The **Objectives** View is displayed by default.
4. Each of the general Scorecard Tab menu options are detailed individually below.

### Scorecard Tab: Export

1. Access Scorecard Tab.
2. To export the currently displayed Scorecard Tab page:
  - o Click **Export** on the SSM Scorecard Menu.
3. The **SM - Export Options** window appears.



- o Select **Excel** or **Word**, Click

4. An Excel or Word window is automatically opened, containing the data.

	A	B	C	D	E	F	G	H
1	Perspectives, KPIs	Trend	Status	Actual	Target	Score (%)	Lead/Lag	Unread Comments
2	CCT Corporate 201112							0
3	A Caring City		On Target				3	0
4	2A.2 No of sanitation serv points (toilet -			-	32 268.00	-	Lagging	0
5	2A.4 No of water serv points (taps) insti-			-	7 000.00	-	Lagging	0
6	2A.8#Informal settlements receiving dc-			-	223	-	Lagging	0



E.g. If Excel is selected, the Excel start bar icon will blink.

- o Save the files normally via the MS Excel or Word menus.

- o Close the MS Word or Excel file.

5. Select Internet Explorer to return to the still open Scorecard page.

### Scorecard Tab: View Comments



View Comments is available in

- [Scorecard Tab: Objectives View - Perspective Details](#)
- [Scorecard Tab: Objectives View - Objective Details](#)
- Scorecard Tab: Scorecard Overviews View - KPI Details

1. Access Scorecard Tab.
2. To display comments, next to **Comments** , click [View](#).
3. The **SM - Comments** window appears.

Comments linked to Tab **Themes**

Context	Type	Tab
CCT Corporate 201112	Strategy	Themes

Subject	Date
No comments found	

- o **Context** defaults to the current Context (E.g. CCT Corporate 201112).
  - o **Type** defaults to the current tab (E.g. **Strategy**).
4. Select a **Type**, for illustrative purposes select **Perspective**.

Type

- Strategy
- Objective
- Perspective
- KPI
- Strategy



See SSM Corporate Scorecard for an explanation of the **Type** options.

- o With **Type** **Perspective** selected, the secondary tab offers further **Perspective** options.

Comments linked to Perspective **A Well-Run City**

Context	Type	Perspective
CCT Corporate 201112	Perspective	A Well-Run City

Subject	Date
No comments found	



Each **Type** selection contains multiple secondary selections.

5. To view additional comments select  **Include Expired**.

Comments linked to KPI 8A.2 % Improvement of responsiveness in service delivery

Context	Type	KPI		
CCT Corporate 201112	KPI	8A.2 % Improvement of responsiveness in service deliv	<input checked="" type="checkbox"/> Include Expired	<input type="button" value="Reset Filters"/> <input type="button" value="More filters"/>

Subject	Expired	Date	Author
REASON FOR VARIANCE Q1	Y	09 Feb 2012	KARIN BEGBIE
REASON FOR VARIANCE Q2	Y	09 Feb 2012	KARIN BEGBIE
REMEDIAL ACTION Q1	Y	09 Feb 2012	KARIN BEGBIE
REMEDIAL ACTION Q2	Y	09 Feb 2012	KARIN BEGBIE

Subject REASON FOR VARIANCE Q1      Expiration Date 31 Dec 2011

Related Groups SSM\_USERS

Description  
Target achieved.

Average days to close:  
Actual = 11.20 days; Target = 11.48 days  
Score = 100%

Closure Rate:  
Actual = 78%; Target = 79%

o In the above illustration **Type** **KPI**, and **KPI**: **8A.2% Improvement of responsiveness ...** is selected.

6. To view additional comment details, click a comment to **select** it.

Subject	Expired	Date
REASON FOR VARIANCE Q1	Y	09 Feb 2012

o Additional details are displayed for the selected comment: **Subject**, **Related Groups**, **Expiration Date** and **Description**.

7. For further comment search options, click .

Comments linked to KPI 8A.2 % Improvement of responsiveness in service delivery

Context	Type	KPI		
CCT Corporate 201112	KPI	8A.2 % Improvement of responsiveness in service deliv	<input checked="" type="checkbox"/> Include Expired	<input type="button" value="Reset Filters"/> <input type="button" value="Less filters"/>

Creation Date	Author	Expiration Date	Keyword (in subject)

o Additional comment search options are offered: **Creation Date**, **Author**, **Expiration Date**, and **Keyword (in subject)**.

o To reset any searches, click .

o To hide filter options, click .

8. Additional comment options  and  are displayed.

o   are greyed-out if not available for use.

9. To leave the **SM - Comments** window:

o Click  or  *Close*.

### Scorecard Tab: Add Comments



Add Comments is available in

- [Scorecard Tab: Objectives View - Perspective Details](#)
- [Scorecard Tab: Objectives View - Objective Details](#)
- [Scorecard Tab: Scorecard Overviews View - KPI Details](#)

1. [Access Scorecard Tab](#).
2. To add a comment, next to , click [Add](#).



Comments are used for capturing the “REASON FOR VARIANCE”, and validating captured target values, see PROCEDURE Capture, Approve and Edit Metrics (KPI’s).

3. The **SM - Enter a new comment** window appears.

- o Type in a **Subject\*** (compulsory field).
  - o Type in the **Comment\*** (compulsory field).
  - o Under **Expiration Date**:
    - **This comment doesn't expire** is selected by default.
    - If you would like to set an expiry date,  un-tick the selection, and click  *Calendar* to select an expiration date.
  - o In **Groups**, click on the SSM\_USERS group to select it, then click [>>](#).
4. When your comment details are captured, click .
  5. A system Message appears: **Comment saved**.
    - o Click .
  6. The newly created comment is indicated as unread: .
    - o It can be read by clicking on  or [View](#).

### Scorecard Tab: Filtering

1. [Access Scorecard Tab.](#)

2. To filter displayed items, on the top right of the page, click **More filters**.

- o To filter, click for drop down lists under **Responsible**, **Status**, **Pathways**, or **Initiatives**.
- o Click **Reset Filters** to remove any entered filters, and reset displayed objectives.
- o Click **Less filters** to hide the filters.

3. To filter items by hierarchy, click **Dimension filters**.

- o The **SM - Select one member** window appears,

- Select a Dimension (E.g. DEPARTMENT\_BY\_DIRECTORATE).
- Select a department in **HIERARCHY**.
- Click **Return**.

- o Items are now displayed by department.

## 11. PROCEDURE Scorecard Tab: Objectives View

- ❖ **Purpose of Procedure:** Navigate the Scorecard tab, Objectives View.
- ❖ **Location:** [CITYweb](#) Intranet > SAP Portal > Corporate Dashboards > Enterprise Performance Management > SAP Strategy Management.
- ❖ **Scenario Selections:**
  - Corporate Scorecard: City of Cape Town ; Context: CCT Corporate 201112

This procedure includes the following:

- [Scorecard Tab: Objectives View - Perspective Details](#)
- Scorecard Tab: Objectives View - Objective Details

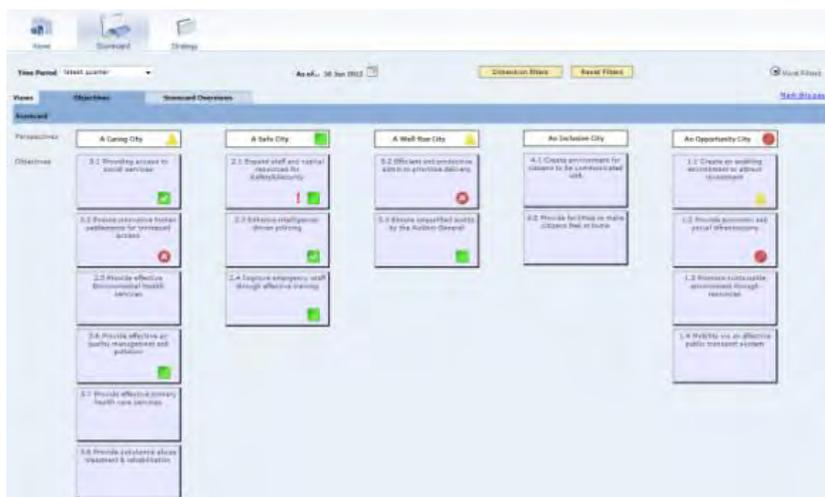
### Access Scorecard Tab

1. Access SSM, in the **SAP Strategy Management** page, click City of Cape Town .
2. The **SAP BusinessObjects Strategy Management** (SSM Scorecard) page appears.
  - o At the top right of the page, click *Maximise*.
  - o Ensure the **Context**, **Time Period** and **As of ...** date are set appropriately.



See PROCEDURE Set Scorecard Selections.

3. Click **Scorecard Tab**.

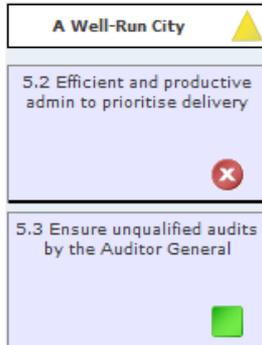


- o The **Objectives** View is displayed by default.
4. All **Perspectives** and **Objectives** are displayed.
    - o High level results are indicated according to the Scorecard key at the bottom of the page.



### Scorecard Tab: Objectives View - Perspective Details

1. Access Scorecard Tab, **Objectives** View.



- o Note **Perspective** A Well-Run City , has a status of *On Target*.
  - The status is informed by **Objective 5.2** with a status of *Well Below*.
  - The status is informed by **Objective 5.3** with a status of *Above*.

2. To view Perspective Details:



- o Click on one of the displayed **Perspectives**, E.g. A Well-Run City .

3. The [Scorecard](#) > **Perspective Details** page appears.

**Scorecard > Perspective Details**

**A Well-Run City**

Score (%) 1

Calculation Method Arithmetic Average

Description

Responsible

Type External

Associated Links

Comments  [View](#) [Add](#)

Objectives/KPIs	Status	Score (%)	Unread Comments
<a href="#">5.2 Efficient and productive admin to prioritise delivery</a>		1	
<a href="#">8A.1 % 'Truly loyal' employees as measured (YT)</a>		-	
<a href="#">8A.2 % Improvement of responsiveness in service delivery</a>		87.92	
<a href="#">8C.1 Comm satisfaction score measured asym.scale(YT)</a>		-	
<a href="#">5.3 Ensure unqualified audits by the Auditor General</a>		4	
<a href="#">8B.1 Opinion of Auditor General (YT)</a>		100	
<a href="#">8B.2 Opinion of independent rating agency (YT)</a>		100	



Click [links](#) to proceed directly to [Scorecard](#) > **Objective Details** or **KPI Details**.

4. In [Scorecard](#) > **Perspective Details**: **Objectives / KPIs** for the selected perspective (E.g. **A Well-Run City**) are displayed.

Objectives/KPIs	Status	Score (%)	Unread Comments
<a href="#">5.2 Efficient and productive admin to prioritise delivery</a>	✖	1	
<a href="#">8A.1 % 'Truly loyal' employees as measured (YT)</a>		-	
<a href="#">8A.2 % Improvement of responsiveness in service delivery</a>	✖	87.92	
<a href="#">8C.1 Comm satisfaction score measured asym.scale(YT)</a>		-	
<a href="#">5.3 Ensure unqualified audits by the Auditor General</a>	✔	4	
<a href="#">8B.1 Opinion of Auditor General (YT)</a>	✔	100	
<a href="#">8B.2 Opinion of independent rating agency (YT)</a>	✔	100	

- o **Objective 5.2** is displayed with the status *Well Below*.
  - The associated **KPI's** ([8A.1](#), [8A.2](#), [8C.1](#)) are listed beneath.



**KPI 8A.2** status is , putting **Objective 5.2** and **Perspective** A Well-Run City  at risk.

- o **Objective 5.3** is displayed with the status *Above*.
  - Both associated KPI's reflect this status.
  - Hover over the associated KPI (E.g. [8A.2](#)) to see further KPI information.

**8A.2 % Improvement of responsiveness in service delivery**  
The notification system is an electronic recording system to capture service requests received from customers (internal and external).  
The indicator measures the % achievement against a set improvement target, as an average of the following two components:  
• The time to close notifications  
• The closure rate of notifications  
The indicator is calculated as follows:  
1. A Baseline is determined for each of the components using a rolling average. The source of information for this is the SSM Notification system.  
2. The Target for improvement is calculated based on the baseline. The targets for improvement are as follows:  
Target Q1 = 3% improvement against baseline  
Target Q2 = 6% improvement against baseline  
Target Q3 = 9% improvement against baseline  
Target Q4 = 12% improvement against baseline  
1. Measure the actual performance against the

5. In [Scorecard](#) > **Perspective Details**: Additional information for the selected perspective (E.g. **A Well-Run City**) is displayed.

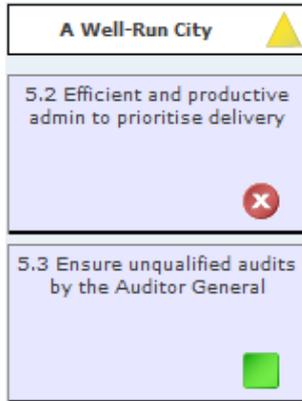
- o The colour-coded dial indicates the overall Perspective status.
- o Further information includes:
  - **Score (%)** shows a numeric value for the dial status (E.g. 1).
  - **Calculation method** details how the score is derived, i.e. the average of the associated objectives' scores
  - **Objectives** repeat a quick links list of the objectives detailed in **Objectives / KPIs**.
  - **Description, Responsible, Type** and **Associated Links** will display any additional information available for the Perspective.
  - [View](#) or [Add Comments](#) for the Perspective.



See Scorecard Tab: View Comments, Scorecard Tab: Add Comments.

### Scorecard Tab: Objectives View - Objective Details

1. Access Scorecard Tab, **Objectives** View.



- o Note **Perspective** **A Well-Run City** with a status of **On Target**.
  - o Note **Objective 5.2** with a status of **Well Below**.
2. To view Objective Details:
    - o Click on one of the displayed **Objectives**, (E.g. 5.2).
  3. The **Scorecard > Objective Details** page appears.

Perspectives, Objectives, KPIs	Trend	Status	Actual	Target	Score (%)	Lead/Lag	Unread Comments
CCT Corporate 201112							
A Caring City		▲			3		
A Safe City		■			4		
A Well-Run City		▲			3		
5.2 Efficient and productive admin to prioritise delivery		✖			1		
8A.1 % "Truly loyal" employees as measured (YT)		✖	-	35.00	-	Leading	
8A.2 % Improvement of responsiveness in service delivery	↘	✖	87.92	100.00	87.92	Lagging	
8C.1 Comm satisfaction score measured asvm.scale(YT)	—	✖	2.70	29.00	9.31	Leading	
An Inclusive City							
An Opportunity City		●			2		



Click [links](#) to proceed directly to **Scorecard > Perspective Details** or **KPI Details**.



E.g. click [A Well-Run City](#) to proceed directly to **Scorecard > Perspective Details**.

4. **Perspectives, Objectives, KPIs** for the selected objective (E.g. [5.2](#)) are displayed.

Perspectives, Objectives, KPIs	Trend	Status
<a href="#">CCT Corporate 201112</a>		
<input type="checkbox"/> <a href="#">A Caring City</a>		▲
<input type="checkbox"/> <a href="#">A Safe City</a>		■
<input type="checkbox"/> <a href="#">A Well-Run City</a>		▲
<input type="checkbox"/> <a href="#">5.2 Efficient and productive admin to prioritise delivery</a>		✘
<a href="#">8A.1 % 'Truly loyal' employees as measured (YT)</a>		
<a href="#">8A.2 % Improvement of responsiveness in service delivery</a>	↘	✘
<a href="#">8C.1 Comm satisfaction score measured asvm.scale(YT)</a>	—	✘
<input type="checkbox"/> An Inclusive City		
<input type="checkbox"/> An Opportunity City		●

- o The relevant **Perspective** is displayed: [A Well-Run City](#).
  - The associated **KPI's** ([8A.1](#), [8A.2](#), [8C.1](#)) are listed beneath.
  - Hover over the associated KPI (E.g. [8A.2](#)) to see a brief summary.

**8A.2 % Improvement of responsiveness in service delivery**

The notification system is an electronic recording system to capture service requests received from customers (internal and external).

The indicator measure, the % ac...

Responsible JUSTINE QUINCE

5. In [Scorecard](#) > **Objective Details**: Additional information for the selected objective (E.g. [5.2](#)) is displayed.

**5.2 Efficient and productive admin to prioritise delivery**

Score (%) 1

Calculation Method Arithmetic Average

KPIs

- [8A.1 % 'Truly loyal' employees as measured \(YT\)](#)
- [8A.2 % Improvement of responsiveness in service delivery](#)
- [8C.1 Comm satisfaction score measured asvm.scale\(YT\)](#)

Description 5.2 Establish an efficient and productive administration that prioritizes delivery

Responsible

Associated Links

Comments  [View](#) [Add](#)

- o The colour-coded dial indicates the overall Objective status.
- o Further information includes:
  - **Score (%)** shows a numeric value for the dial status (E.g. 1).
  - **Calculation method** details how the score is derived, i.e. the average of the associated KPI's scores.
  - **KPIs** repeat a quick links list of the KPI's detailed in **Perspectives, Objectives, KPIs**.
  - **Description, Responsible, and Associated Links** will display any additional information available for the Objective.
  - [View](#) or [Add Comments](#) for the Objective.



See [Scorecard Tab: View Comments](#), Scorecard Tab: Add Comments.

## 12. PROCEDURE Scorecard Tab: Scorecard Overviews View

- ❖ **Purpose of Procedure:** Navigate the Scorecard tab, Scorecard Overviews View
- ❖ **Location:** [CITYweb](#) Intranet > SAP Portal > Corporate Dashboards > Enterprise Performance Management > SAP Strategy Management.
- ❖ **Scenario Selections:**
  - Corporate Scorecard: City of Cape Town ; Context: CCT Corporate 201112

This procedure includes the following:

- Scorecard Tab: Scorecard Overviews View
- [Scorecard Tab: Scorecard Overviews View - KPI Details](#)

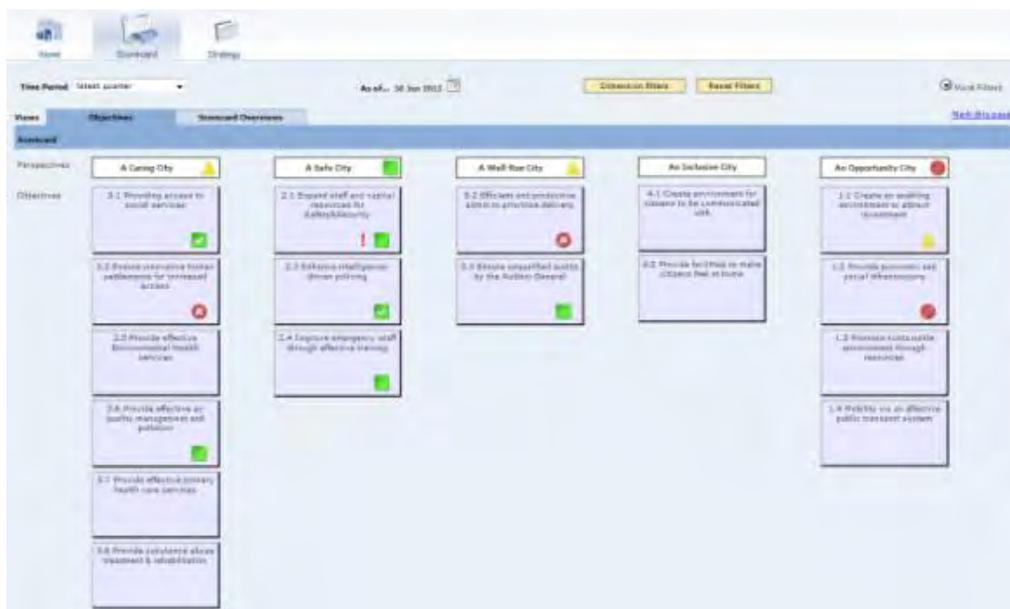
### Access Scorecard Tab

1. Access SSM, in the **SAP Strategy Management** page, click City of Cape Town .
2. The **SAP BusinessObjects Strategy Management** (SSM Scorecard) page appears.
  - o At the top right of the page, click Maximise.
  - o Ensure the **Context**, **Time Period** and **As of ...** date are set appropriately.



See PROCEDURE Set Scorecard Selections.

3. Click Scorecard **Scorecard Tab**.



- o The **Objectives** View is displayed by default.

### Scorecard Tab: Scorecard Overviews View

1. Access Scorecard Tab, **Scorecard Overviews** View.

Perspectives, Objectives, KPIs	Trend	Status	Actual	Target	Score (%)	Lead/Lag	Unread Comments
CCT Corporate 201112							
A Caring City		▲				3	
3.1 Providing access to social services		✓				5	
7A.1 Number of targeted development programmes	↗	✓	25.00	20.00	125.00	Lagging	
3.2 Ensure innovative human settlements for increased access		✗				1	
5B.1 No of housing opportunities provided per year	↘	✗	7,907.00	8,800.00	89.85	Lagging	
5B.2 Implementation informal Settlement Upgrade prog (UISP)&(EHP)	↗	✗	1,190.00	1,400.00	85.00	Lagging	
3.5 Provide effective Environmental Health services						-	
2C.4 % Drinking water compliance to SANS 241				96.00		Lagging	

- o The **Perspectives, Objectives, KPIs** list is displayed, with all line items expanded by default.
  - o Hierarchical items can be individually contracted **+**, or expanded **-**.
2. To contract the **Perspectives, Objectives, KPIs** list, at the top right of the page, click [Open All](#).
    - o All items are contracted.

Perspectives, Objectives, KPIs	Trend	Status
CCT Corporate 201112		
A Caring City		▲
A Safe City		■
A Well-Run City		▲
An Inclusive City		
An Opportunity City		●

3. To expand the **Perspectives, Objectives, KPIs** list, at the top right of the page, click [Close All](#).
  - o All items are expanded.
4. To adjust the displayed format, at the top right of the page, click [Select Format](#).
  - o The **SM – Customise Layout** window appears.

**Select Format**

Perspectives, KPIs  
 Perspectives, Objectives, KPIs  
 Perspectives, Objectives, Initiatives  
 Perspectives, Objectives, KPIs, Initiatives

**Select columns to display**

Trend	<input checked="" type="checkbox"/>	Previous Target	<input type="checkbox"/>	Responsible/Owner	<input type="checkbox"/>
Status	<input checked="" type="checkbox"/>	Target % Change	<input type="checkbox"/>	Abnormal KPI Performance	<input type="checkbox"/>
Actual	<input checked="" type="checkbox"/>	Perspective	<input type="checkbox"/>	Budget Status	<input type="checkbox"/>
Target	<input checked="" type="checkbox"/>	Lead/Lag	<input checked="" type="checkbox"/>	Schedule Status	<input type="checkbox"/>
Score (%)	<input checked="" type="checkbox"/>	Type	<input type="checkbox"/>	Start	<input type="checkbox"/>
Previous Actual	<input type="checkbox"/>	Unread Comments	<input checked="" type="checkbox"/>	Target End	<input type="checkbox"/>
Actual % Change	<input type="checkbox"/>	Associated Initiative	<input type="checkbox"/>	Actual End	<input type="checkbox"/>

[Select All](#)   [Deselect All](#)   [Restore defaults](#)

- o Under **Select Format**,  Select the desired display format.
  - **Perspectives, Objectives, KPIs** is the default selection.
- o Under **Select columns to display**,  Select the desired columns.
  - Default columns are ticked.



**Unread Comments**  is a useful selection.

- o [Select All](#), [Deselect All](#) and [Restore Defaults](#) aid selection.
- o Click .
- o The **Scorecard Overviews** View display is adjusted to your selection.

5. To bookmark this page, click [Mark this page](#).



See SSM Scorecard Menu: Mark this page.

6. The **Scorecard Overviews** View has the following columns selected by default.

- o 

<a href="#">Trend</a>	<a href="#">Status</a>	Actual	Target	Score (%)	Lead/Lag	Unread Comments
-----------------------	------------------------	--------	--------	-----------	----------	-----------------



See Step 4 above to select columns displayed.



See SSM Indicator Attributes for Lead/lag explanation.

- o Column results are indicated according to the Scorecard key at the bottom of the page.



### Scorecard Tab: Scorecard Overviews View - KPI Details

1. Access Scorecard Tab, **Scorecard Overviews** View.
2. To view KPI Details:
  - o Click on a displayed KPI, (E.g. [8A.2 % Improvement of responsiveness in service delivery](#)).
3. The [Scorecard](#) > **KPI Details** page appears.



4. In [Scorecard](#) > **KPI Details**: Additional information for the selected KPI (E.g. [8A.2](#)) is displayed.



- o The colour-coded dial indicates the overall KPI status.
- o Further information includes:
  - **Measures:** Actual, target, Score, GAP Performance for the last quarter (AprJun 2012). The Score represents: "What % of our target have we achieved?". The Gap Performance represents: "How does the selected period's score/performance compare to the previous period?"



The Gap Performance determines the trend indicator. The Gap Performance calculates the deviation percentage of the indicator scores, using the moving average for two periods (i.e. latest quarter time period, or latest month).

- Formula: (Current score for selected time period - Moving Average for 2 periods)
- % (ABS(Moving Average for two periods)).
- E.g. = (82.94 - 84.9) % (ABS(84.9)) = -1.96%84.9 = -2.31

- **Score History** shows quarterly results (E.g. AprJun 2012), and trends.
- **Description** provides information regarding the KPI.
- **Associated Links** displays further information available for the KPI.
- **Responsible** shows who is accountable for the KPI.
- **Objective** provides a quick link to [Scorecard](#) > **Objective Details**.



See Scorecard Tab: Objectives View - Objective Details.

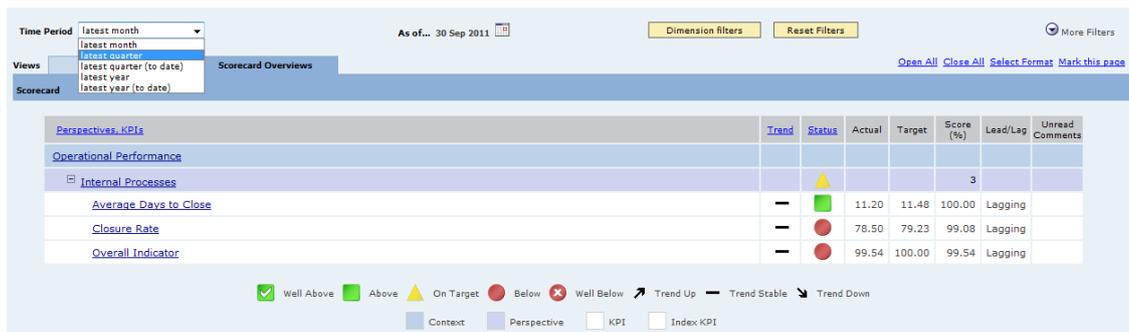
- **Perspective** lists the relevant Key Pillar (E.g. A Well-Run City).
- [View](#) or [Add Comments](#) for the KPI.



See Scorecard Tab: View Comments, Scorecard Tab: Add Comments.

- o **Associated Links** in this KPI example provides a [Breakdown of Indicator](#) link.

- Clicking on the link opens a new window showing a breakdown.

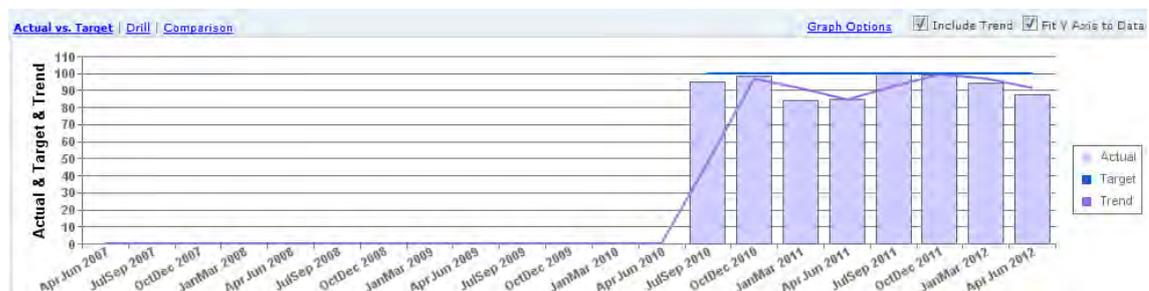


When the new window is opened, an additional window displays the system message: **Strategy Management has opened a new browser window.** Click Close.



Ensure the **Time Period** is reflective of your chosen selection (PROCEDURE Set Scorecard Selections). Most **Associated Links** lead to the BI report that provides the underlying data, enabling confirmation of the results.

- 5. The KPI [Actual vs. Target](#) results are depicted graphically per quarter.



- o  **Include Trend** to display trends on the graph.

6. To change the displayed graph, click [Graph Options](#).

- o The **SM – Graph Options** window appears; the currently displayed KPI is defaulted.



- o Adjust **Settings** and **Options** as desired.
- o Click  to save changes, then  to close the window.

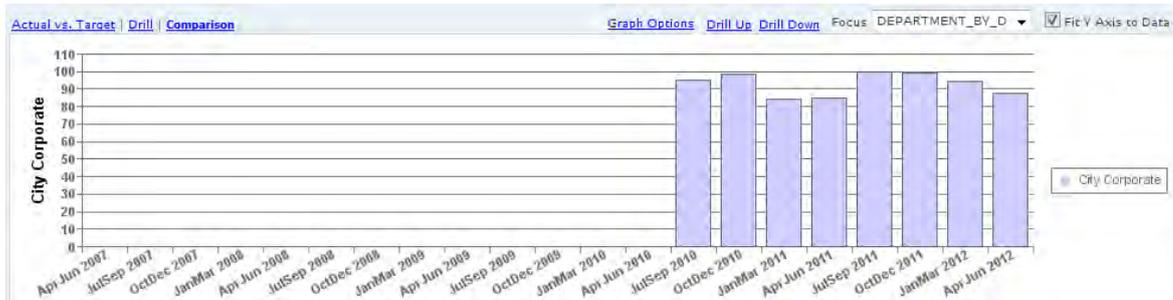
7. [Drill](#) displays the Measures **Actual**, **Target**, **Score (%)** and **Gap Performance** for the last quarter (E.g. AprJun 2012).

	Actual	Target	Score (%)	Gap Performance
City Corporate	87.92	100.00	87.92 <span style="color: red;">✘</span>	100.00 <span style="font-size: small;">↗</span>



By clicking on [City Corporate](#) all underlying directorates, and the departments under them are expanded and displayed.

8. [Comparison](#) displays a quarterly comparison for the *City Corporate* scorecard.



- o In **Focus**, Select  to see *All Directorates* illustrated in the graph.

### 13. PROCEDURE Home Tab: Navigation

- ❖ **Purpose of Procedure:** Navigate the Home tab.
- ❖ **Location:** [CITYweb](#) Intranet > SAP Portal > Corporate Dashboards > Enterprise Performance Management > SAP Strategy Management.
- ❖ **Scenario Selections:**
  - Corporate Scorecard: City of Cape Town ; Context: CCT Corporate 201112

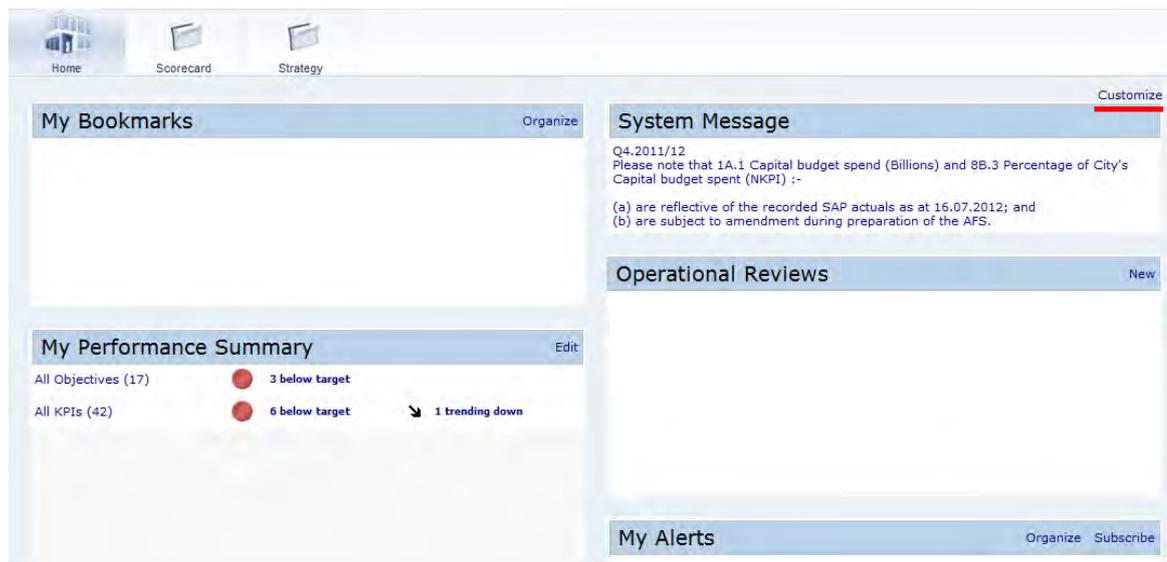
This procedure includes the following:

- Home Tab: Customize
- Home Tab: My Bookmarks
- [Home Tab: My Performance Summary](#)
- Home Tab: System Message
- Home Tab: Operational Reviews
- [Home Tab: My Alerts](#)

#### Access Home Tab

1. Access SSM, in the **SAP Strategy Management** page, click City of Cape Town .
2. The **SAP BusinessObjects Strategy Management** (SSM Scorecard) page appears.
  - o At the top right of the page, click *Maximise*.

3. Click Home **Home Tab**.



4. Each of the Home tab **blocks** are detailed individually below.

### Home Tab: Customize

1. Access Home Tab.
2. To control which blocks are displayed, at the top right of the page, click [Customize](#).
  - o The **Customize Home Page** window appears.

Add panel ▾

Select hidden panels from the dropdown to display and drag them to the preferred location

Uncheck the panels to hide them

<input checked="" type="checkbox"/> Bookmarks	<input checked="" type="checkbox"/> System Message
<input checked="" type="checkbox"/> Performance Summary	<input checked="" type="checkbox"/> Operational Reviews
	<input checked="" type="checkbox"/> Alerts
	<input checked="" type="checkbox"/> External Content Links

- All blocks are automatically  selected to display on your **Home** tab.
- Un-tick blocks to hide them on your **Home** tab.

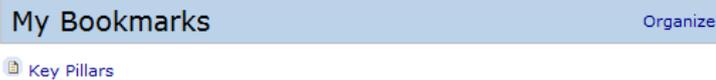


If you accidentally un-tick a block, click **Add Panel** ▾ to re-select.

- Click  or  *Close*.

### Home Tab: My Bookmarks

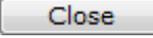
1. Access Home Tab.
2. **My Bookmarks** lists any pages you have marked.



- o E.g. The [Key Pillars](#) bookmark shown above.



To create a bookmark, see SSM Scorecard Menu: Mark this page.

3. To rename or delete existing bookmarks, at the top right of the block, click [Organize](#).
  - o The **SM - Organize My Bookmarks** window appears.
    - Select a bookmark by clicking on it.
    - Click  to change the label.
    - Click  to remove the bookmark.
    - Click  to leave the window.

### Home Tab: My Performance Summary

1. Access Home Tab.
2. The current performance of **All Objectives** and **All KPI's** are displayed by default.

o Performance results are indicated according to the Scorecard key.

3. Click on the Performance Summary [links](#) to proceed directly to the results on the **Scorecard** tab.
  - o E.g. Clicking on the [3 below target](#) Objectives example shown above:
    - Opens the **Scorecard** tab, displaying the 3 particular objectives that are below target.
    - Objectives are arranged under the respective **Perspective**.

- o E.g. Clicking on the [6 below target](#) KPI's example shown above:
  - Opens the **Scorecard** tab, displaying the 6 particular KPI's that are below target.
  - KPI's are arranged under the respective **Perspective**.

Perspectives_KPIs	Trend	Status	Actual	Target	Score (%)	Lead/Lag	Unread Comments
<b>CCT Corporate 201112</b>							
<b>A Caring City</b>							
5B.1 No of housing opportunities provided per year	—	⊗	7,907.00	8,800.00	89.85	Lagging	
5B.2 Implementation informal Setlmt Upgrade prog (UISP)&(EHP)	—	⊗	1,190.00	1,400.00	85.00	Lagging	
<b>A Safe City</b>							
<b>A Well-Run City</b>							
8A.2 % Improvement of responsiveness in service delivery	↘	⊗	87.92	100.00	87.92	Lagging	
<b>An Inclusive City</b>							
<b>An Opportunity City</b>							
1A.1 Capital budget spend (Billions)	—	⊗	4.17	4.33	96.23	Lagging	
1A.4 % of Building plans finalised within timeframes	—	⊗	73.60	75.00	98.13	Lagging	
8B.3 Percentage of City's Capital budget spent (NKPI)	—	⊗	91.42	95.00	96.23	Lagging	

4. To monitor specific objectives and KPI's, at the top right of the block, click [Edit](#).
  - o The **SM - Performance Summary** window appears.

Select the Initiatives, Objectives, and KPIs you wish to monitor

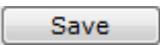
<b>All Initiatives</b> <div style="border: 1px solid black; height: 40px;"></div>	<div style="text-align: center;">&gt;&gt; &lt;&lt;</div>	<b>Selected Initiatives</b> <div style="border: 1px solid black; height: 40px;"></div>
<b>All Objectives</b> <div style="border: 1px solid black; padding: 2px;">           3.8 Provide substance abuse treatment &amp; rehabilitation            4.1 Create environment for citizens to be communicated            4.2 Provide facilities to make citizens feel at home            5.2 Efficient and productive admin to prioritise delivery            5.3 Ensure unqualified audits by the Auditor General         </div>	<div style="text-align: center;">&gt;&gt; &lt;&lt;</div>	<b>Selected Objectives</b> <div style="border: 1px solid black; padding: 2px;">           5.2 Efficient and productive admin to prioritise delivery         </div>
<b>All KPIs</b> <div style="border: 1px solid black; padding: 2px;">           7A.2 No of days when air pollution exceeds WHO guidelin            8A.1 % 'Truly loyal' employees as measured (YT)            8A.2 % Improvement of responsiveness in service delive            8A.3 %People from EE targ groups employed - 3 mgmt l            8A.4 % Budget spent on implementation of WSP for the         </div>	<div style="text-align: center;">&gt;&gt; &lt;&lt;</div>	<b>Selected KPIs</b> <div style="border: 1px solid black; padding: 2px;">           8A.2 % Improvement of responsiveness in service delivery         </div>

5. To monitor objectives:
  - o In **All Objectives**, use the scroll bar to navigate up and down.
  - o Click on an objective to select it.
  - o Click  to copy it to the **Selected Objectives**.



To remove a selection, click .

6. To monitor KPI's:
  - o In **All KPIs**, use the scroll bar to navigate up and down.
  - o Click on a KPI to select it.
  - o Click  to copy it to the **Selected KPIs**.

7. To save selections for monitoring, click .
  - o A system message appears: **Save completed**
  - o Click .

8. Items selected for monitoring appear under **My Objectives**, and **My KPIs**.

**My Performance Summary** Edit

All Objectives (17) ● 3 below target

All KPIs (42) ● 6 below target ↘ 1 trending down

**My Objectives**

Status
<span style="color: red; font-weight: bold;">✘</span> 5.2 Efficient and productive admin to prioritise delivery

**My KPIs**

Trend	Status
<span style="font-weight: bold;">↘</span>	<span style="color: red; font-weight: bold;">✘</span> 8A.2 % Improvement of responsiveness in service delivery

### Home Tab: System Message

1. Access Home Tab.
2. The latest **System Message** is automatically displayed in this block.
  - o Messages are updated centrally by system administrators, and cannot be edited or removed.

### Home Tab: Operational Reviews

1. Access Home Tab.
2. The **Operational Reviews** block is not currently in use:
  - o A KPI Summary Report is being developed to use instead.

### Home Tab: My Alerts

1. Access Home Tab.
2. **My Alerts** lists any alerts you have set up.
3. To setup an alert, at the top right of the block, click [Subscribe](#).
  - o The **SM - Alerts Subscription** window appears.

All Initiatives	Selected Initiatives
<div style="border: 1px solid gray; height: 30px;"></div>	<div style="border: 1px solid gray; height: 30px;"></div>
<input type="button" value="&gt;&gt;"/> <input type="button" value="&lt;&lt;"/>	
Alert me when an event below occurs on selected initiatives	
<input type="checkbox"/> Date, status, or milestones changed <input type="checkbox"/> Milestone will slip behind schedule in 3 days <input type="checkbox"/> Comment was added	Notification sent immediately Notification sent nightly Notification sent immediately
All Objectives	Selected Objectives
<div style="border: 1px solid gray; padding: 2px;">           4.1 Create environment for citizens to be communicated            4.2 Provide facilities to make citizens feel at home            5.2 Efficient and productive admin to prioritise delivery            5.3 Ensure unqualified audits by the Auditor General         </div>	<div style="border: 1px solid gray; padding: 2px;">           5.2 Efficient and productive admin to prioritise delivery         </div>
<input type="button" value="&gt;&gt;"/> <input type="button" value="&lt;&lt;"/>	
Alert me when an event below occurs on selected objectives	
<input checked="" type="checkbox"/> Objective status changed from last period <input checked="" type="checkbox"/> Objective comment was added	Notification sent nightly Notification sent immediately
All KPIs	Selected KPIs
<div style="border: 1px solid gray; padding: 2px;">           7A.2 No of days when air pollution exceeds WHO guideline            8A.1 % 'Truly loyal' employees as measured (YT)            8A.2 % Improvement of responsiveness in service delivery            8A.3 %People from EE targ groups employed - 3 mgmt k         </div>	<div style="border: 1px solid gray; padding: 2px;">           8A.2 % Improvement of responsiveness in service delivery         </div>
<input type="button" value="&gt;&gt;"/> <input type="button" value="&lt;&lt;"/>	
Alert me when an event below occurs on selected KPIs	
<input checked="" type="checkbox"/> KPI status changed from last period <input checked="" type="checkbox"/> KPI comment was added	Notification sent nightly Notification sent immediately
Notification (across all contexts)	
<input checked="" type="radio"/> Display notification in home page <input type="radio"/> Display notification in home page and send email	

4. To add an objective alert:

- o In **All Objectives**, click on an objective to select it.

- Click  to copy it to the **Selected Objectives**.



Use the scroll bar to navigate up and down; to remove a selection click .

- o Select when you would like to receive alerts for the selected objectives:

- In the **Alert me when an event below occurs on selected objectives** section,  Select the objective event type you would like to be alerted on.

- E.g. Receive alerts when:  *Objective comment was added*.



At least one objective event type must be selected.

5. To add a KPI alert:

- o In **All KPIs**, click on a KPI to select it.

- Click  to copy it to the **Selected KPIs**.



Use the scroll bar to navigate up and down.

- o Select when you would like to receive alerts for the selected KPI's:

- In the **Alert me when an event below occurs on selected KPI's** section,  Select the KPI event type you would like to be alerted on.

- E.g. Receive alerts when:  *KPI comment was added*



At least one KPI event type must be selected

6. To manage notifications:

- o In **Notifications (across all contexts)**

- o  Select to just display the notification in the Home tab, or send an email as well.

7. To save alert subscriptions, click .

- o A system message appears: **Save completed**

- o Click 

### 14. PROCEDURE Strategy Tab: Navigation

- ❖ **Purpose of Procedure:** Navigate the Strategy tab: Key Pillars View.
- ❖ **Location:** [CITYweb](#) Intranet > SAP Portal > Corporate Dashboards > Enterprise Performance Management > SAP Strategy Management.
- ❖ **Scenario Selections:**
  - Corporate Scorecard: City of Cape Town ; Context: CCT Corporate 201112

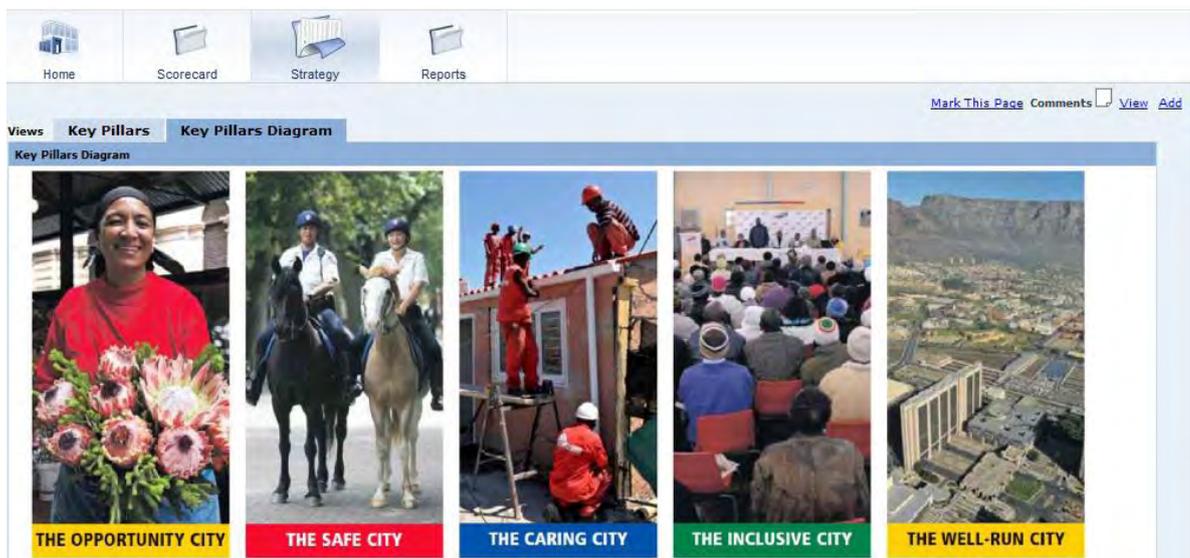
This procedure includes the following:

- Strategy Tab: Key Pillars View

#### Access Strategy Tab

1. Access SSM, in the **SAP Strategy Management** page, click City of Cape Town .
2. The **SAP BusinessObjects Strategy Management** (SSM Scorecard) page appears.
  - o At the top right of the page, click *Maximise*.

3. Click **Strategy Tab**.



- o The **Key Pillars Diagram** View is displayed by default.

### Strategy Tab: Key Pillars View

1. Access Home Tab, **Key Pillars** View.

**Key Pillars**

- A Caring City
- A Safe City
- A Well-Run City**
- An Inclusive City
- An Opportunity City

**Objectives**

Perspectives	A Caring City	A Safe City	<b>A Well-Run City</b>	An Inclusive City	An Opportunity City
Objectives	3.1 Providing access to social services	2.1 Expand staff and capital resources for Safety&Security	5.2 Efficient and productive admin to prioritise delivery	4.1 Create environment for citizens to be communicated with	1.1 Create an enabling environment to attract investment
	3.2 Ensure innovative human settlements for increased access	2.3 Enhance intelligence-driven policing	5.3 Ensure unqualified audits by the Auditor General	4.2 Provide facilities to make citizens feel at home	1.2 Provide economic and social infrastructure
	3.5 Provide effective Environmental Health services	2.4 Improve emergency staff through effective training			1.3 Promote sustainable environment through resources
	3.6 Provide effective air quality management and pollution				1.4 Mobility via an effective public transport system
	3.7 Provide effective primary health care services				



See, where **Perspectives** = IDP's five **Key Pillars**.

2. Click on one of the **Key Pillars** to select it (E.g. **A Well-Run City**).
  - o The selected item is displayed (E.g. **A Well-Run City**).
  - o The associated **Perspectives** and **Objectives** are highlighted.
3. To see further **Perspective** information, click on the desired block (E.g. **A Well-Run City**).

**Perspective** A Well-Run City

Type None

**Objectives**

- 5.3 Ensure unqualified audits by the Auditor General
- 5.2 Efficient and productive admin to prioritise delivery

- o A pop up window displays **Perspective**, **Type** and associated **Objectives** information.

- o Click to view **Perspective** comments.

Comments linked to Perspective **A Well-Run City**

Context	Type	Perspective
CCT Corporate 201112	Perspective	A Well-Run City



See Scorecard Tab: View Comments for available functionality.

- o Click to close the window.

- To see further **Objective** information, click on the desired block (E.g. ).

**Objective** ✕

5.2 Efficient and productive admin to prioritise delivery

---

**Description**

5.2 Establish an efficient and productive administration that prioritizes delivery

- o A pop up window displays **Objective** and **Description** information.
- o Click to view **Objective** comments.



See Scorecard Tab: View Comments for available functionality.

- o Click to close the window.

- For further information. scroll to the bottom of the page.

**Legend**

Associated Objectives

**Description** A well-run city is the guarantor of all other government programmes. Citizens need to know that their **More**

**Responsible** MARTHINUS VAN DER MERWE

**Associated Link** [Term of Office Five Year Integrated Development](#)

- o **Description**, **Responsible** and **Associated Links** are displayed.

- To see a full length description of the selected **Perspective** (E.g. **A Well-Run City**):

- o Next to **Description**, click on **More**.
- o The **SM - Description** window appears.

SM - Description -- Webpage Dialog ✕

A Well-Run City

---

**Description**

A well-run city is the guarantor of all other government programmes. Citizens need to know that their government works for them, is accountable to them and answers to them at all times. Governments manage public resources and programmes. As such, they must be constantly scrutinised in public to ensure responsible management. The underlying tenets of the well-run city are the principles of openness and due process.

- A full length **Description** is displayed.
- Click or **Close**.

7. To download the full IDP pdf document:

- o Next to **Associated Links**, click [Term of Office Five Year Integrated Development](#).

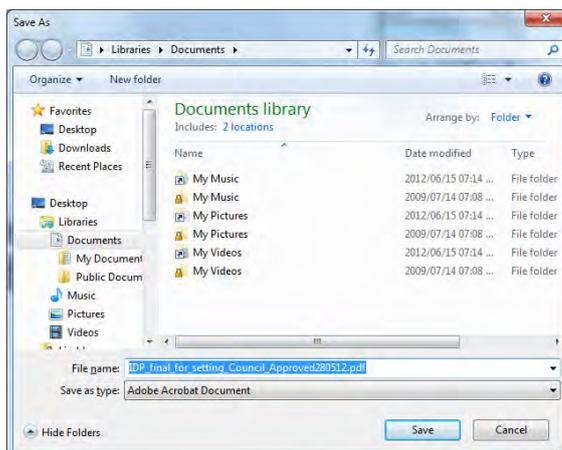


Your Internet Explorer settings may differ, saving files directly to a pre-defined location. You may therefore not see the **File Download** or **Save As** windows.

- o If a **File Download** window appears, click .



- o If a **Save As** window appears.



- The **File name** is defaulted.
- Browse to the folder you wish to save the file in.
- Click .

- o The file is saved as a pdf file to your pc.

- When a file is downloaded, a blank **Webpage Dialog** window is opened.
- Click  to close it.

### 15. PROCEDURE Capture, Approve and Edit Metrics (KPI's)

- ❖ **Purpose of Procedure:** Capturing, approving and editing metrics (KPI's).
- ❖ **Audience:** SSM Capturers; SSM Approvers (See Table 1: SSM Roles).



See SSM Scorecard Workflow for capturing and approving metrics (KPI's).



A history of all metric (KPI) actions and comments is available in the **Entry and Approval Home** page, under [Approval Log](#).

This procedure includes the following:

- Capture Metrics [SSM Capturer]
- Edit Metrics [SSM Capturer]
- Approve Metrics [SSM Approver]

#### Capture Metrics [SSM Capturer]



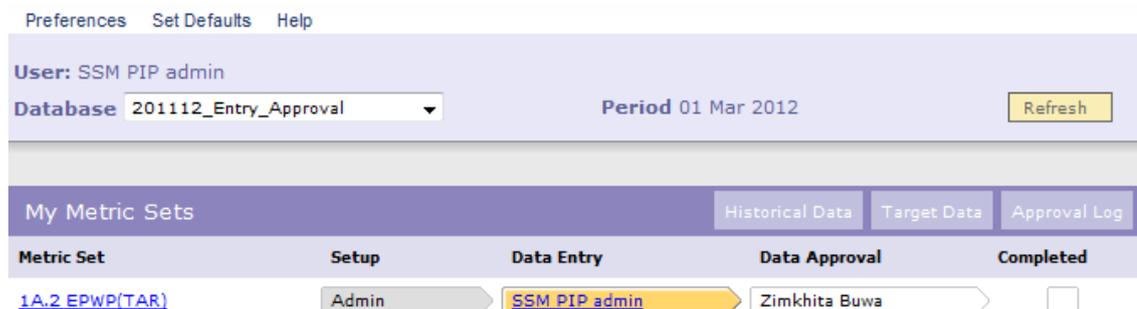
Metrics (KPI's) cannot be captured until the IDP Administrator has opened the period, which initiates automated emails being sent to SSM Capturers that the metrics (KPI's) are released, and capturing can commence.

1. In your Email Inbox:
  - o You will receive an email stating metric sets (KPI's) are released for data entry.



- o Click on [Go to Entry and Approval](#).

2. The **Entry and Approval Home** page appears.



- o In the **Metric Set** (KPI) record, the **Data Entry** column is **orange**, indicating data can be entered (E.g. [1A2](#) above)
- o Click on the **Data Entry link** to capture metric data.

3. The **Data Entry** Page appears.

Select a Metric Set to Display below:  
1A.2 EPWP(TAR)  Display Previous Period Actual

Numeric format 123,456,789.00  
To change, [set your preferences](#)

1A.2 EPWP(TAR) [Download to Excel](#) [Refresh](#) [Historical Data](#) [Approval Log](#) [Save](#) [Submit for Approval](#)

Metric	DEPARTMENT_BY_DIRECTORAT	DIRECTORATE	Actual	Target
EPWP_Opp	Housing Management	Human Settlements		16,500.00



The process flow illustrates the **Data Entry** step. Metric formats (E.g. numeric above) are set per metric. The **Target** field value is **highlighted**, indicating it can be edited.

- o Under **Target**, enter the target value for the selected metric (KPI).
- o Click [Submit for Approval](#).

4. The **Add a Note** window appears.

- o Enter the following note requirements:
  - Type in “*REASON FOR VARIANCE*”, and enter the relevant *financial year and quarter*.
  - Enter a *descriptive explanation* for the variance.
  - Type in “*REMEDIAL ACTION:*” and enter the planned action to resolve the variance. Include any previous unresolved actions (provides a schedule of incomplete actions).
  - Type in “*DATE:*” and enter the date envisaged to conclude the required action.
  - Type in “*RESPONSIBLE PERSON:*” and enter the individual responsible for the action/s.



This is a requirement from the Office of the Auditor General of South Africa (AGSA).

- o Click [Submit](#).



An email requesting approval is automatically generated and sent to the designated SSM Approver. Information entered in the **Note** is included in the email.



**Note** information is stored on the *Approval Log*, but not automatically pulled through to the SSM Scorecard. It is therefore recommended that it also be captured in [Scorecard Tab: Add Comments](#) for the particular metric (KPI).

5. The **Data Entry** Page is automatically refreshed.

Metric	DEPARTMENT_BY_DIRECTORAT	DIRECTORATE	Actual	Target
EPWP_Opp	Housing Management	Human Settlements		16,500.00



The process flow diagram illustrates **Data Approval** is the next step. The **Target** field value is grey, indicating data is captured and submitted, and can no longer be edited.

- o Click **Entry and Approval Home**.

6. The **Entry and Approval Home** page reappears.

- o In the **Metric Set** (KPI) record, the **Data Entry** column has changed from orange to grey - indicating target values are captured and submitted. The **Data Approval** column is no longer greyed out - indicating the metric (KPI) is ready for approval.

Metric Set	Setup	Data Entry	Data Approval	Completed
<a href="#">1A.1 Direct Job Opp(ACT)</a>	Admin	Zimkhita Buwa	SSM PIP admin	<input type="checkbox"/>

- o Click **Close** to exit the page.

### Approve Metrics [SSM Approver]



Metrics (KPI's) cannot be approved until the SSM Capturer has captured and submitted the metric target value, which initiates the automated email requesting approval.

1. In your Email Inbox:
  - o You will receive an email stating metrics (KPI's) have been submitted to you for approval.

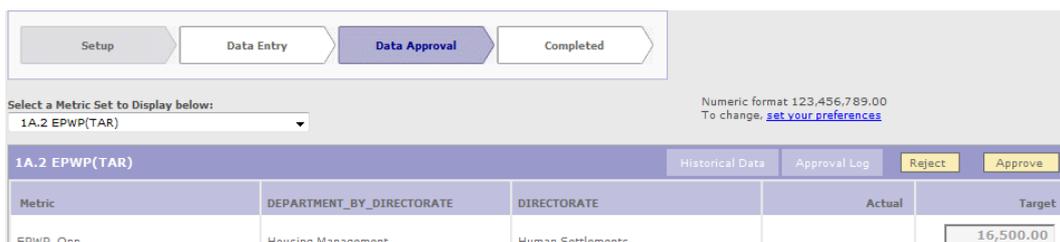


In the email body, **Comments:** should include the “REASON FOR VARIANCE”, “QUARTER” and “REMEDIAL ACTION” note information entered by the SSM Capturer.

- o Click on [Go to Entry and Approval](#).
2. The **Entry and Approval Home** page appears.

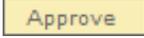


- o In the **Metric Set** (KPI) record, the **Data Approval** column is **orange**, indicating it is ready for approval (E.g. [1A2](#) above).
- o Click on the **Data Approval** [link](#) to capture metric data.
3. The **Data Approval** Page appears.



The process flow diagram illustrates this is the **Data Approval** step. The **Target** field value is **grey**, indicating data is captured and submitted, and is ready for approval.

4. Approve or reject the captured metric (KPI):

- o To *Approve*, click .
  - The **Add a Note** window appears.
  - Type in a comment if desired, click .



**Note** information is stored on the *Approval Log*, but not automatically pulled through to the SSM Scorecard. It is therefore recommended that when data is approved, a confirmation note is also captured in [Scorecard Tab: Add Comments](#) for the particular metric (KPI).



See SSM Scorecard Workflow; by approving a KPI, you are confirming that the figures, attached evidential documentation, and note information is accurate (REASON FOR VARIANCE”, “QUARTER”, “REMEDIAL ACTION”).

- o To *Reject*, click .
  - The **Add a Note** window appears.
  - Type in “REASON FOR REJECTION:” and enter the necessary details.
  - Click .
  - An email requesting data editing is automatically generated and sent to the SSM Capturer.

5. The **Entry and Approval Home** page reappears.

- o If Approved:
  - In the approved **Metric Set** (KPI) record, the **Data Approved** column has changed from orange to grey, and the **Completed** column contains  - indicating the metric (KPI) is captured, approved and complete.

My Metric Sets					Historical Data	Target Data	Approval Log
Metric Set	Setup	Data Entry	Data Approval	Completed			
<a href="#">1A.1 Direct Job Opp(ACT)</a>	Admin	Zimkhita Buwa	SSM PIP admin	<input type="checkbox"/>			
<a href="#">1A.1 Direct Job Opp(TAR)</a>	Admin	Zimkhita Buwa	SSM PIP admin	<input type="checkbox"/>			
<a href="#">1A.2 Direct Investm(ACT)</a>	Admin	<a href="#">SSM PIP admin</a>	<a href="#">SSM PIP admin</a>	<input checked="" type="checkbox"/>			

- o If Rejected:
  - In the approved **Metric Set** (KPI) record, the **Data Entry** column is orange, with  - indicating the metric (KPI) was rejected and returned for editing.

My Metric Sets					Historical Data	Target Data	Approval Log
Metric Set	Setup	Data Entry	Data Approval	Completed			
<a href="#">1A.2 EPWP(TAR)</a>	Admin	<a href="#">SSM PIP admin</a>	<a href="#">SSM PIP admin</a>	<input type="checkbox"/>			

- o Click  *Close* to exit the page.



The IDP Administrator can only close the period once all metrics (KPI’s) on the Corporate Scorecard are captured and approved. Once the period is closed, the data is uploaded to the PAS model, making it accessible via SSM.

### Edit Metrics [SSM Capturer]



If a metric (KPI) is rejected by the SSM Approver, you will receive an automated email requesting it be edited.

1. In your Email Inbox:
  - o You will receive an email stating metric sets (KPI's) are released for data entry.



In the email body, **Comments:** should include "REASON FOR REJECTION:" note information entered by the SSM Approver.

- o Click on [Go to Entry and Approval](#).
2. The **Entry and Approval Home** page appears.



Metric Set	Setup	Data Entry	Data Approval	Completed
<a href="#">1A.2 EPWP(TAR)</a>	Admin	SSM PIP_admin	SSM PIP_admin	<input type="checkbox"/>

- o In the approved **Metric Set** (KPI) record, the **Data Entry** column is **orange**, indicating data can be entered. ↻ indicates the metric (KPI) was rejected and returned for editing.
- o Click on the **Data Entry** [link](#) to capture metric data.

3. The **Data Entry** Page appears.



Metric	DEPARTMENT_BY_DIRECTORAT	DIRECTORATE	Actual	Target
EPWP_Opp	Housing Management	Human Settlements		16.500,00



The process flow illustrates the **Data Entry** step. Metric formats (E.g. numeric above) are set per metric. The **Target** field value is **highlighted**, indicating it can be edited.

- o Under **Target**, enter the target value for the selected metric (KPI).
- o Click [Submit for Approval](#).
4. The **Add a Note** window appears.
  - o Enter the following note requirements:
    - Type in "REASON FOR VARIANCE", and enter the relevant *financial year and quarter*.
    - Enter a *descriptive explanation* for the variance.
    - Type in "REMEDIAL ACTION:" and enter the planned action to resolve the variance. Include any previous unresolved actions (provides a schedule of incomplete actions).
    - Type in "DATE:" and enter the date envisaged to conclude the required action.
    - Type in "RESPONSIBLE PERSON:" and enter the individual responsible for the action/s.



This is a requirement from the Office of the Auditor General of South Africa (AGSA).

- o Click **Submit**.



An email requesting approval is automatically generated and sent to the designated SSM Approver. Information entered in the **Note** is included in the email.



**Note** information is stored on the *Approval Log*, but not automatically pulled through to the SSM Scorecard. It is therefore recommended that it also be captured in [Scorecard Tab: Add Comments](#) for the particular metric (KPI).

- The **Data Entry** Page is automatically refreshed.

Metric	DEPARTMENT_BY_DIRECTORAT	DIRECTORATE	Actual	Target
EPWP_Opp	Housing Management	Human Settlements		16,500.00



The process flow diagram illustrates **Data Approval** is the next step. The **Target** field value is grey, indicating data is captured and submitted, and can no longer be edited.

- o Click **Entry and Approval Home**.

- The **Entry and Approval Home** page reappears.

- o In the **Metric Set** (KPI) record, the **Data Entry** column has changed from orange to grey - indicating target values are captured and submitted. The **Data Approval** column is no longer greyed out - indicating the metric (KPI) is ready for approval.

Metric Set	Setup	Data Entry	Data Approval	Completed
<a href="#">1A.1 Direct Job Opp(ACT)</a>	Admin	Zimkhita Buwa	SSM PIP admin	<input type="checkbox"/>

- o Click **Close** to exit the page.

## Appendix A - References

### References

- [1] Information Quotes: [http://www.decision-making-solutions.com/information\\_quotes.html](http://www.decision-making-solutions.com/information_quotes.html)
- Quote: William G. Pollard (1911 - 1989), American Physicist
  - Quote: Peter F. Drucker, (1909 - 2005), Author and Teacher
  - Quote: William Feather, (1889 - 1981), Author and Publisher
- [2] Integrated Development Plan (IDP)
- [Approved IDP 2012-2017](#)
    - City Managers foreword: Achmat Ebrahim (City Manager).
  - Diagram: [CCT: WhatisThe5yearPlan](#)
- [3] OPM:
- OPM Issues: SAP AG Slide.
  - Wayne W. Eckerson, Director of Research for The Data Warehousing Institute (TDWI): Performance Dashboards: Measuring, Monitoring, and Managing Your Business; John Wiley & Sons, 14 Oct 2005
  - Margaret Rouse: [corporate-performance-management](#); [business-intelligence](#)
  - Gartner: [Gartner Definition](#); [Gartner Article](#)

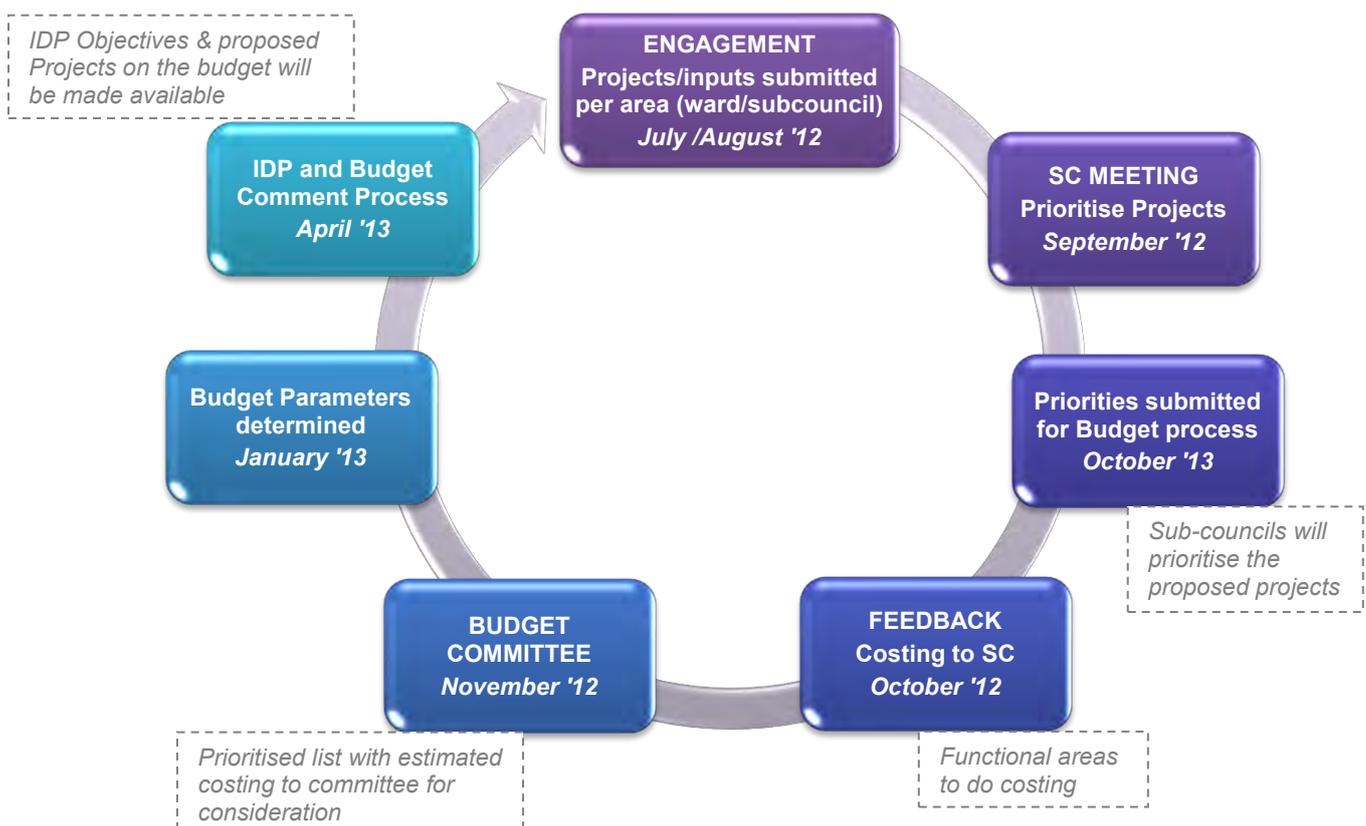
### Appendix B - Scorecard Process & Timelines

The Acronyms, Process and current Council approved submission timelines for Scorecards are detailed below for ease of reference.

#### Acronyms

BSC	Budget Steering Committee
EMT	Executive Management Team
IDP	Integrated Development Plan
MTBPS	Medium Term Budget Policy Statement
MTREF	Medium Term Revenue and Expenditure Framework
MSA	Municipal Systems Act
MFMA	Municipal Finance Management Act
MPRA	Municipal Property Rates Act
MayCo	Mayoral Committee
OPM	Organisational Performance Management
PC's	Portfolio Committees
PPU	Public Participation Unit
SDBIP	Service Delivery and Budget Implementation Plan
TMA	Total Municipal Account

#### Process



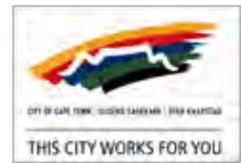
### Scorecard Time-schedule

Item No.	Scorecard Deliverable	Time Frame
1	Planning for the 2013/14 IDP and Budget: a) Strategic session with IDP, EMT, MayCo	Aug'12
	b) Engaging the public on priorities for the IDP and Budget <i>via joint Ward Committee meetings per Sub-councils</i>	Jul/Aug'12
	c) Engage Communities on Performance Man System on KPI and setting of targets	
	d) Strategic session with IDP Reference Group (Corporate Scorecard process included)	Aug/Sep'12
2	4th Quarter Performance reports: a) 2011/12 Fourth Quarter Corporate Performance Report to PCs, MayCo & Council	Aug'12
	d) 2011/12 Fourth Quarter Directorate and department SDBIPs to PC's and MayCo	Aug'12
3	1st Quarter and Annual Performance Report: a) Table draft 2011/12 Annual Report to MayCo.	Nov'12
	b) 2012/13 First Quarter Corporate Performance Report to PCs, MayCo and Council	Nov'12
	d) 2012/13 First Quarter Directorate and Department SDBIPs to PC's and MayCo	Nov'12
	e) Tabling 2011/12 Annual report to council	Jan'13
	f) Final Draft of 2011/12 Annual Report (including the City's Financial statements) submitted to the Auditor General, Provincial Treasury & Dept. Local Government	Jan'13
	g) Public participation process - 2011/12 Annual Report	Feb'13
4	2012/13 Mid-year assessment and review (to potentially influence 2013/14)	Jan'13
5	First draft of 2013/14 Budgets: 1st draft Capital Budget including ward allocation projects to BSC/EMT	Jan'13
6	2nd Quarter and Annual Performance Reporting: a) 2012/13 Second Quarter (mid year) Corporate Performance Report to MayCo and Council	Jan/Feb'13
	c) 2012/13 Second Quarter Corporate Performance Report to PCs	Jan/Feb'13
	d) 2011/12 Annual report made public and submitted to Portfolio Committees	Feb'13
	e) 2012/13 Second Quarter Directorate and department performance report to PC's, MayCo	Feb'13
	7	First Drafts of Plans Completed: a) 1st draft Operating Budget including: Ward allocation projects, particulars of beneficiaries of Section 67 Grants (ward allocations and other)
7	b) Completion of 2013/14 Draft: • Directorate Executive Summaries and SDBIPs • Departments Business Plans and SDBIPs to all Portfolio Committees, MayCo	Feb'13
	c) Table draft 2013/14 IDP incl. Corporate Scorecard and Budget Report to MayCo and Council	Mar'13
	d) Approval of 2011/12 Oversight report on Annual Report by Council	Mar'13
	e) Conduct 2013/14 IDP incl. Corporate Scorecard and Budget Public Hearings to obtain public comment from communities, provincial government and other relevant stakeholders	Apr'13
	8	3rd Quarter Performance Reports: a) 2012/13 Third Quarter Corporate Performance Report to PCs, MayCo and Council
	c) 2012/13 Third Quarter Directorate and Department SDBIPs to PC's and MayCo	Jun'13
9	Approval of 2013/14 IDP incl. Corporate Scorecard and budget: a) Council must give final approval of the IDP incl. Corporate Scorecard & Budget document by resolution, setting taxes and tariffs, approving changes to the IDP and budget related policies, approve measurable performance objectives for revenue by source and expenditure by vote before the start of the financial year	May'13



# SAP End-User Training Document

## SSM Reporting Manual



Item No.	Scorecard Deliverable	Time Frame
	b) Notification of approved 2013/14 IDP and Budget to public	Jun'13
	c) Response to public comment i.r.o. Budget, tariffs and policies	Jun'13
	d) Approval of 2013/14 Final: <ul style="list-style-type: none"> <li>• Directorate Executive Summaries and SDBIPs</li> <li>• Departments Business Plans and SDBIPs to all Portfolio Committees, MayCo &amp; Council</li> </ul>	May'13
	e) City Manager gives Draft 2013/14 Corporate SDBIP to the Executive Mayor for consideration, 14 days after approval of the budget	May'13
10	Public Making and Compliance:	Jun'13
	a) Submit final 2013/14 IDP incl. Corporate Scorecard document to MEC of Local Government within 10 days after Council approval	Jun'13
	b) Executive Mayor to approve 2013/14 Corporate SDBIP within 28 days after approval of budget	Jun'13
	c) Place all 2013/14 Directorate Executive Summaries and SDBIPS; and Department Business Plans and SDBIPs on website	Jun'13
d) Submit 2013/14 Corporate SDBIP and Budget Document to National and Provincial Treasury and make public	Jun'13	

## Appendix C - Indicator Guidelines

### GUIDELINES FOR CREATING AUDITABLE INDICATORS

#### 1. Questions to ask when developing indicators

(1) The selected **Indicators** were analyzed based on the characteristics prescribed by National Treasury in the Framework for Managing Programme Performance Information, namely:

**Reliable** (the indicator should be accurate enough for **its intended use** and **respond to changes in the level of performance**):

- Q? What is the intention of the indicator? (E.g. are the objective and indicator aligned?)
- Q? What wants to be achieved with the indicator?
- Q? Does it clearly show the level of performance? (Increase vs. Number)

**Well-defined** (the indicator needs to have a **clear, unambiguous definition** so that **data will be collected consistently**, and be easy to understand and use):

- Q? Is the definition obvious/understandable/plain to a cold reader?
- Q? No double interpretation can be made, based on the definition.
- Q? Will two different people be able to get to the same conclusion or understanding of the indicator?

**Verifiable** (it must be possible to **validate the processes and systems** that produce the indicator):

- Q? Can you re-perform indicator calculations and still get to the same answer?
- Q? What processes and systems are used to verify the indicator?
- Q? And can these processes and systems be verified?

**Cost-effective** (the usefulness of the indicator must justify the cost of collecting the data):

- Q? Is indicator internally or externally generated?
- Q? What is the cost involved based on above question? (Contractors vs. Internal staff)

**Appropriate** (the indicator must **avoid unintended consequences and encourage service delivery improvements**, and not give managers incentives to carry out activities simply to meet a particular target):

- Q? What are the consequences (penalty/cost) of the indicator?
- Q? Does it encourage service delivery improvement?
- Q? Who will benefit from this indicator? The community OR managers? (Performance bonuses incentive very lucrative)

**Relevant** (the indicator must relate logically and directly to an aspect of the City's mandate and the realisation of strategic goals and objectives)

- Q? Is it in line with City's mandate and strategic goals and objectives?
- Q? And can it be logically and directly linked there to?

(2) Selected **Targets** were analyzed based on the characteristics prescribed by National Treasury in the Framework for Managing Programme Performance Information, namely:

**Specific:** the nature and the required level of performance can be clearly identified.

Q? What is the nature/character of the target?

Q? Does it clearly show the level of performance?

**Measurable:** the required performance can be measured

Q? Is it quantifiable/ tangible?

**Achievable:** the target is realistic given existing capacity

Q? Can the target be achieved with the existing capacity?

Q? Does the city have the capacity/ability/competence to achieve the target?

**Relevant:** the required performance is linked to the achievement of a goal

Q? What is the goal of the indicator/target?

Q? Is the performance linked to the goal of the target/indicator?

**Time-bound:** the time period or deadline for delivery is specified

Q? What is the timeline of the target?

Q? By when does the City want to achieve this target?

## **2. Testing criteria used by the Office of the Auditor General**

### **Evaluation of usefulness and compliance**

Evaluating the measurability, relevance, consistency, existence, timeliness and presentation of planned and reported performance information

- ❖ Measurability - it must have a clear, unambiguous definition; it should be defined so that data will be collected consistently; it must be easy to understand and useful.
- ❖ Relevance - evaluate whether it relates directly to the institution's strategic goals and objectives.
- ❖ Consistency - indicators per strategic plan (IDP/SDBIP) agrees to indicators in annual report.
- ❖ Existence - performance information is reported.
- ❖ Timeliness - submission.
- ❖ Presentation - in the annual performance report.

### **Evaluation of reliability**

Evaluating the validity, accuracy and completeness of planned and reported performance information by substantive testing

- ❖ Validity - each item recorded is verifiable to supporting documentation.
- ❖ Accuracy - each item recorded accurately represents the supporting documentation.
- ❖ Completeness - all items that should have been recorded are recorded.