# **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
ВІ	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
МауСо	Mayoral Committee
ОРМ	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 <u>hyperlinked</u> Table of Contents; <u>links</u> 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 <u>Appendix A - References</u>.





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# 1. Introduction

*"Information is a source of learning. But unless it is organized, processed, and available to the right people in a format for decision making, it is a burden, not a benefit." William G. Pollard* [1].

This SAP Strategy Management (SSM) Reporting Manual has been formulated to provide you with a reference guide to SSM navigation and transactional procedures.

The SSM Contextual <u>Background</u> information is explained, with specific reference to the Integrated Development Plan (IDP) process and reporting. <u>Organisational Performance</u> <u>Management (OPM)</u> is briefly examined, along with the associated OPM issues, Cascading Goals, and a look at how SSM can assist with OPM and IDP objectives.

In <u>SSM Scorecard Concepts Overview</u>, SSM Scorecard types and workflow are introduced, paying particular attention to the Corporate Scorecard. SSM Indicator types, attributes and evidence are also described. Corporate Dashboards illustrates the Dashboard architecture, and provides insight into the Executive Mayoral Dashboard items. PROCEDURE General Information lists the SAP and Scorecard elements used in the subsequent step-by-step procedures, as well as the illustrated business scenarios.

# 1.1 High Level Learning Outcomes

Learning outcomes highlight the concepts and information that you should understand upon conclusion of the SSM Reporting training. These are assessed, and incorporate the below high level learning outcomes.

An understanding of SAP BI benefits in a CCT context, specifically corporate scorecards. i.e. Why it's useful.

An understanding of the structure of the CCT Corporate Scorecards. i.e. How it relates to the IDP.

Knowledge of how to access, navigate and use the SAP Strategy Management tool. i.e. How to use it.

Clarity on what is required to action legislated IDP requirements in SSM.
 i.e. Why it's important to you.

# 1.2 Learning Journey

Your training falls under the auspices of the 'Blended learning' technique, which combines various training approaches. These include (but are not limited to):

- Classroom based learning (Facilitator led).
- On the job learning.
- Scenario based learning (real world examples) to help you understand your roles and responsibilities in relation to processes and systems.
- Self-study and continual reference.





# 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'.







# 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.





# 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.

<u>Appendix C - Indicator Guidelines</u> 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.



### **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.





# 4.2 SSM Corporate Scorecard

The Corporate Scorecard is based on the IDP, and contains the following key elements:

- **Context:** Refers to the Financial Year.
- Perspective: Refers to the 5 pillars (to be renamed 'Pillar' or SFA Strategic Focus Area).
- **Objective:** Refers to the underlying, numbered IDP Objective.
- **KPI:** Refers to the associated, numbered Key Performance Indicator being measured.

The IDP.OPM Department is responsible for implementing and maintaining the Corporate Scorecard. Executive Directors or Directors are assigned responsibility for Corporate Scorecard approvals.

The Corporate Scorecard is governed by centrally maintained timelines for opening and closing periods. These are set by the IDP Administrator, with detailed dates and times posted regularly on the <u>IDP SharePoint site</u>. The timelines are as follows:

- Final data: The system will be open for data capturing and review by line departments until the Monday before the third EMT meeting after the quarter end.
- Quality reviewed data: The data will be quality reviewed from the Final data date above. All changes will be agreed with line. The 'SSM Approver' will sign off a process plan to prevent further quality review issues.

<u>Appendix B - Scorecard Process & Timelines</u> contains the current Council approved submission timelines for Scorecards.

# 4.3 SSM Scorecard Workflow









## 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 <u>IDP SharePoint site</u>.



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	DEFAULTS
Standard KPIs Contexts Manage Contexts Pick Objectives Set Display Order Assign Application Groups Pick Reports and Dashboards Override Descriptions Add System Message	KP1s 1A.1 Increase number of direct job opportunities created 1A.2 Maintain Rand Value of direct invstmnt (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 Stdium 2A.1 % Households with access to basic levels sanitation 2A.10 % Informal households receiving refuse collection 2A.2 %Informal settlement househlds access to sanitation 2A.3 Service rate of Informal Settlements Sanitation	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  Edit Responsible
Strategy  Set Strategy Defaults Set Themes or Pathways Set Causes and Effects Scorecards	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 %Households with access to basic levels 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	Leading/Lagging     Qualitative/Quantitative       O Leading     Image: Comparison of the second se

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 (<u>IDP SharePoint site</u>).
- 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 <u>IDP SharePoint site</u>. The IDP Administrator links this evidence to the relevant KPI in SSM, under '**Associated Links**'.

note

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: <u>CITYweb</u> Intranet > SAP Portal > Corporate Dashboards > Enterprise Performance Management > Executive Mayoral Dashboard



Home	CRM	UAT	Contractor Self-Service	Corporate Reporting	Corporate Dashboards
Service Map	Enterprise Performance	e Management	Human Resources Logisti	ics Internal Operations	Corporate Works Manager
Corporate Da	Shboards > Service Ma Enterpris Executive Ma SAP Strategy	e Performa	ince Management		

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



note





# 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).

		CITY	OF CAP	E IOWN G DASHBOARD			
DIR	ECTORATE: CORPORATE SERVICE	5					28 August 2012
SSUE NO	ISSUE DESCRIPTION	ACTION REQUIRED	TARGET	NOTES RECORDED AT PREVIOUS DASHBOARD SESSION ON 14 AUGUST 2012	STATUS	PROGRESS	EXPLANATORY NOTES/ COMMENTS/ DIRECTIVES FROM MAYOR'S OFFICE/ RECOMMENDED REMEDIAL ACTION
POL	ITICAL OVERSIGHT REPORTING (Report	is to be submitted 7 days before Dashboard (	feeling]				Legend: A-Completed; B - Vork in
MA	CO MEMBER: ALD DEMETRI GUALLY TE	NO: 021-4001299 CELNO: 0836291326			-	_	Progress; C = Overduel Late; D = Nothing to Report
1	New Policy developed Existing Policies amended	New applicable policies to be developed & existing policies reviewed	NA		D	NITeReport	
2	New By-Laws developed Existing By Lows amended	New applicable policies to be developed & existing policies reviewed	NA.		D	NilloReport	
з	Matters arising from monthly IDP Monitoring	Written report on Deviations to be submitted to Mayor's office by ESO	31-Jul-12		С	Guerdue	
4	Matters arising from monthly SDBIP Monitoring	Written report on Deviations to be submitted to Mayor's affice by ESO	31-Jul-12		с	Overdue	
5	Decisions taken by Mayco Member ito Delegated Powers	Written report to be submitted to Mayors office by ESO	31-Jul-12		с		
6	Meetings with internal stakeholders/ committees	Written report to be submitted to Moyor's office by ESO	31-Jul-12		с		
7	Meetings with external organisations	Written report to be submitted to Mayor's office by ESO	31-Jul-12		с		
8	Virements approved	Written report to be submitted to Moyor's office by ESO	31-30-12		с		
9	Media statements/ ilaison with Press	Written report to be submitted to Mayor's office by ESO	3)-Jul-12		С		
10	External matters negatively affecting Council	Written report to be submitted to Mayor's office by ESO	31-JUH12		с		
11	Internal matters negatively affecting Council	Written report to be submitted to Mayors office by ESO	31-Jul-12		ç		
GE	ERAL MANAGEMENT REPORTING (Reg	orts to be submitted 7 days before Dashboar	d Meeting)	and the statement of		-	
EXE	CUTIVE DIRECTOR: MRS FATIMA HABIB	TEL NO: 021-4005050 CEL NO: 0827866976 Pa	VACANT I	TEL NO: 021-4001231		_	
12	Report progress on SDBIP Implementation	Written report on Deviations to be submitted to Mayor's office by ED	31-JuH12		С	Overdue	
13	Report progress on Opex budget	Written report on Deviations to be submitted to Mayor's office by ED	31-Jul-12		с		
14	Report progress on Capex budget	Written report on Deviations to be submitted to Mayor's affice by £D	31-30-12		С		
15	Vacancier	Total: Directors:	31-Jul-12		c	WP	

Figure 13: Executive Mayoral Dashboard - Adhoc Issues





# 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.

				CI	TY OF C	APE	TOW	N				1 hr
Executive Mayor's Dashboard N Directorate Key Projects for 201 Directorate: City Health	lo 1/2012 "Review Date:	05 S	eptember 20	11		> 10 %	LE 20% Below: < 20 % Belo ON TAR	GEND DANG DW: WA	ER RNING	0		THIS CITY WORKS FOR YOU
	Planned		(1.4C)	P	lanned Spend	as at	Actual	Spend	as at	% Pro	ject Phy	sical Completion as at Review Date
Project Name	Comp- letion	F	Budget Provision		Review Date		Revi	ew Dat	e*	Plan- ned	Actual	Notes / Comments / Actions
*F	Care				RC	%	RC		%	%	20	
khwezi Clinic extensions	30.06.2013	R	20 000	R		0	R	1	#DIV/0!	90%	95%	
New Eerste River clinic	30.06.2013	R	5 200 000	R	1 000 000	19%	R	34 662	8%	80%	75%.	Progress on site has improved with facility at root height. Cash flows and submission of certificate's still disappointing. The consultants and contractor have been requested to stick to the schedule set up during last financial year.
New Eerste River clinic	30.06.2013	R	4 210 000	R		0%	R	1	#DIV/0!	80%	75%	
Dr Toms Clinic	30.06.2013	R	500 000	R		0%	R		#DIV/0!	10%	10%	
Bluedowns Clinic	30.06.2013	R	500 000	R	-	0%	R		#DIV/0!	5%	5%	
Albow Gardens clinic upprade	30.06.2012	R	230 000	B		0%	R		#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.

Home	Scorecard	Strategy	inflatives						
ime Period later	est month	-		As of_ 30 Apr 2012	Dimension filters Reset Filters				More Filter
-			_				Mara All	and in a	
ws C	Objectives	Scorecard Overviews				Ques All	COLUMN AND	at access	and some only
orecard > Filtere	Objectives ed by SCORECARD_P	Scorecard Overviews	**			Goet All			Score
orecard > Tiltere Perspect Indicator	Objectives ed by SCORECARD_P Uves. KDIA	Scorecard Overviews	with			Status	Actual	Terpet	Score (%)
researd > Tiltere Perspect Indicator # Wel	Objectives ed by SCORECARD_P Even.KDIa Elem.Crby	Scorecard Overviews	we			Gran All	Actual	Tarpat	Score (%)
reves C corrected > Tribere Perspect Indicator R Wel 2	objectives ed by SCORECARD_P Even. KP14 ITS El-Run_City to of Posts Filled	Scorecard Overviews	**			Sister	Actual 91.72	Tarpat 90.00	Score (%)

Figure 15: Executive Mayoral Dashboard - Indicators





# 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.

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

	Table	2: SAP	Elements
--	-------	--------	----------





# 6.3 Scorecard Menu Elements

Figure 16: Scorecard Menu Elements

Context CC	T Corporate 201112		- <b>-</b>	Print Mail Export
Refresh P	references Help	Context Map		
ab	6	E		
Home	Scorecard	Strategy		
Time Period	latest quarter	-		As of 30 Jun 2012

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 <u>Corporate Scorecard is used to illustrate SSM functionality and navigation</u>, 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: <u>CITYweb</u> Intranet > SAP Portal > Corporate Dashboards > Enterprise Performance Management > SAP Strategy Management

note

The SAP Portal "Enterprise Performance Management" refers to the City's Organisational Performance Management (OPM).

This procedure includes the following:

- <u>Access SSM</u>
- Proceed to the Corporate Scorecard
- <u>Variable: Proceed to the Directorate Scorecard</u>
- Access SSM
  - 1. On the computer start bar, select 69 Internet Explorer.
  - 2. The default <u>CITYweb</u> Intranet web page appears.
    - o On the right of the screen, under Applications
  - 3. The Welcome to the SAP Portal page appears.

Non ha	SAP Portal	
CITY OF CAPE TOWN ISTRENO SASERAMA STAD KAAPSTAD	User D * Log or Pessivord * Log or Forpet your pass word? <u>Reset your bass word here</u>	
		CAD

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

1 m	E	0	6	6	0	D			
Home	CRM	Employee Self-Service	Manager Self-Service	Corporate Reporting	Corporate Dashboards	Help			
Work									
	< H	ome > Work > Universal Work	list						
Universal Worksst	1	A Coheth ding in gurgestive but	and an Van and her all a	half das under Hannes Ful	att das Duiss				
COCT Logon List		Substitution is currently tal	ned on. You can turn off si	iosteution under wanage Suc	actuition Hulle's				
		Waiting for update							
		Tasks Alerts Notific	ations   SAPoffice Mails	Tracking					
		Show: New and in Progress	Tasks 💌 Al	-					
		Subject	I From		Sant	Princity	v 18		
		output							
note	Hoi	me > Work	> Unive	sal Work	list is disp	layed	d by	default.	
				D					
o At th	e top	of the page	, click 🔤	orporate Dashboards	Corpo	rate	Das	shboard	S.

- Exit SSM
- Exit the SAP Portal

click





5. The **Service Map** page appears.



- o Under Enterprise Performance Management, select SAP Strategy Management.
- 6. The SAP Strategy Management page appears.

Home	Contrac	tor Self-Service	Corporate Reporting	Corporate Dashboards	E Help
Service Map	Enterprise Per	formance Manag	gement Human Resour	ces Logistics Corpora	te Works Management Process
	4 Iy Management	Corporate Dasht	poards > Enterprise Perfor npe Town y Services	mance Management > SAP Si	trategy Management
tip					E .

The currently selected Menu Tab is depicted as an open folder Corporate Dashboards.

#### Proceed to the Corporate Scorecard

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

	Welcome.	
	To start using Strategy Management	
	Select a context	✓ Start
To skip this pa	age in the future, <u>set your Preferences.</u>	

- o At the top right of the page, click Maximise.
- o 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 O Default Tab to skip the Welcome page in future.
- o Set Default Context:
  - Click **▼**, select a **Context** for the current financial year.

CCT Corporate 201112	
Select a context	
CCT Corporate 201112	
CCT Corporate 201011	
CCT Corporate 200910	
CCT Corporate 200809	
Operational Performance	

#### note

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

-	Click  , select Scorecard.
	Strategy 🗸
	Home
	Scorecard
_	Strategy
Clic	с <mark>к</mark> ок

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

0

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

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,



note





# 8. PROCEDURE Set Scorecard Selections

- Purpose of Procedure: Setting basic Scorecard selections.
- Location: <u>CITYweb</u> 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. Scorecard

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



note

The **Context** is defined by financial periods. E.g. <u>CCT Corporate 201112</u> 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 <u>CCT Corporate 201112</u>, and selected **Time Period is** <u>latest</u> <u>quarter</u>, the Date should be set to 30 June to include data up to the end of the last quarter.

note





# 9. PROCEDURE SSM Scorecard Page: General Navigation

- Purpose of Procedure: Navigate general SSM Scorecard Menu items.
- Location: <u>CITYweb</u> 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

note

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

SAP Business	Objects Strategy Mar	nagement		
Context CCT C	orporate 201112		✓ Print Mail Export	
Refresh Prefe	rences Help	Context Map		
	6	E	E	
Home	Scorecard	Strategy	Reports	

- 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 <u>Mark This Page</u> function.





#### SSM Scorecard Menu: Refresh

- 1. Access SSM Scorecard, in the SSM Scorecard page.
- 2. To ensure newly changed selections are applied (E.g. Context changed):
  - o Click Refresh on the SSM Scorecard Menu.



- o A system window pops up, indicating the refresh is taking place
- o The Status will show as Completed once done, and automatically disappear.

#### SSM Scorecard Menu: Preferences

- 1. Access SSM Scorecard, in the SSM Scorecard page.
- 2. To customise your settings:
  - o Click **Preferences** on the SSM Scorecard Menu.
- 3. The SM Set Preferences window appears.

Set Starting Point			Strategy	
Welcome Page Context Map Page			Set Default Tab Goal Diagram	•
Default Tab			Initiatives	
Set Default Context	CCT Corporate 201112			
Set Default Tab	Scorecard		Milestones Display	
			Milestones Summary	
anguage and Numeric	Format		C Fishbone Diagram	
			Dashboard	
Set Default Language	English			
Thousands			Display Default Dashboard	
Decimal			D Override Default Dashboard	
Example	12,345,678.00		-	
tome				
			Reports	
Alerts to Display	Latest 10 -		Display Default Report	
Scorecard			Override Default Report	
Set Default Tab	Objectives			
Display Scorecard	Legend			
		OK Ca	ncel	

- o Make the desired changes, click
- 4. If changes are made, a system message appears: User preferences saved; changes will take effect the next time you start the application.
  - o Click OK
- 5. The SM Set Preferences window disappears.





#### 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.



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







### 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 /	<u>All</u> <u>Colla</u>	pse All	<u>Search</u>		
CCT Corporate 201112	â	Ĩ					
CCT Corporate 201011		Ĩ					
CCT Corporate 200910		Ĩ					
CCT Corporate 200809	⋒	Ĩ					
Operational Performance	â	Ĩ					

o The available Contexts are shown on the left, with the associated quick links for each:

-	$\square$	Jump to Home tab
_	Ĩ	Jump to Strategy tab
_		Jump to Scorecard tab
_		View associated links
-	Þ	View comments

- 4. To exit the **Context Map** window:
  - o Click Close or Close.





#### SSM Scorecard Menu: Print / Mail

- 1. Access SSM Scorecard, in the SSM Scorecard page.
- 2. To save a pdf file of the displayed page:
  - o Click Print or Mail on the SSM Scorecard Menu.
- 3. A system window appears.

Title	Include Title and Annotation
Scorecard	Enter a title
Annotation (optional)	Annotation (optional)
	<ul> <li>Include Perspective and Objective Details</li> <li>Include Mission and Vision Description</li> </ul>
	● Landscape ① Portrait

- o The above illustrates Print or Mail options that may be offered.
- o Complete any available fields as desired.

pote Options available for selection vary according to the page selected for Print/Email.

- **Title** automatically displays the current page title (E.g. Scorecard), and can be edited.
- Annotation allows for additional comments.
- If available, 🖾 select / un-tick available options (E.g. Include Title and Annotation).
- If available, Select available options (E.g. Landscape or Portrait).
- o Click
- 4. A system message appears: Creating document, please wait ...





note



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 Save

Do you	want to open or save this file?
3	Name: trainkpi_33_print.pdf
	Type: Adobe PDF Reader
	From: ssdci01.capetown.gov.za
∕ Al <u>w</u> a	Open Save Cancel

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

J	np	- 47	Search temp	Q
Organize * Ne	w falder		50°	- 0
Favorites	Name		Date modified	Туре
E Desktop	🔁 Save print to file.pdf		2012/08/17 07:19 -	Adobe Ac
Downloads				
Recent Places				
Deskton				
r oextop				
		-		1
File name:	Save print to file.pdf			
Save as type: Adobe Acrobat Document			_	
				-

- o The File name is defaulted <username\_print>.
- o Browse to the folder you wish to save the file in.
- o Click Save
- 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 with 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.
  - Internal (link will appear on Home tab)
     External (URL link to Strategy Management)
     Link Name
     Key Pillars
  - 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 OK
- 5. The newly created link (E.g. Key Pillars) is now available in the Home tab, under My Bookmarks.






# 10. PROCEDURE Scorecard Tab: Navigation

- \* Purpose of Procedure: Navigate general Scorecard Tab menu items
- Location: <u>CITYweb</u> 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: View Comments
- Scorecard Tab: Add 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.

SAP Business	Objects Strategy Man	agement		
Context CCT Co	orporate 201112		•	Print Mail Export
Refresh Prefe	rences Help	Context Map		
	T	F		F
Home	Scorecard	Strategy		Reports

- 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

note

Scorecard Tab.

	Chartest Second C	her starts			_
	A Long Day	A Safe Dity	A Wall fair Uty	As Inclusive City	An Opportunity Day
trad	3.1 Republics account to could neer base	2.1.2 Super-transfer and name	5.2 Officiant antiproduction alter to a providing addition	4.1 Costs protostant for stagen to be contractigited use.	3.1 Depters anality available at a plant that the
	All france outpraces to the set	2.) + Share elariyanan gener pirreq	1.1 there is a solution of the	82 Percia bet Pau in nam Stans bai e tora	1.2 Provide procession and prove of the resulting
	2.17 Provide official as Environmental branch Antician	Z.A Ingenes anappens and			1.3 Biomics Lists april generation in age sectored
	7.4. Provide effective arr sector management and patience	-			) is welling on an allowing pattern to the second
	A 2 Provide effects is preserved				

- 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.

	A1 - (*	f <sub>*</sub> Perspect	ives, KPIs					
	А	В	С	D	E	F	G	Н
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 (toile	t-	-	32 268.00	-	Lagging	0
5	2A.4 No of water serv	v points (taps) inst	-	-	7 000.00	-	Lagging	0
6	2A.8#Informal settler	ments receiving de	-	-	223	-	Lagging	0
	E.g. If	Excel is	selected,	E the E	Excel start	bar icon w	ill blink.	

- o Save the files normally via the MS Excel or Word menus.
- o Close the MS Word or Excel file.
- 5. Select <sup>(E)</sup>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
- <u>Scorecard Tab: Objectives View Objective Details</u>
- Scorecard Tab: Scorecard Overviews View KPI Details
- 1. Access Scorecard Tab.
- 2. To display comments, next to **Comments**, click <u>View</u>.
- 3. The SM Comments window appears.

Comments linked to Tab <b>Th</b>	emes		
Context	Туре	Tab	
CCT Corporate 201112 👻	Strategy 👻	Themes	•
Subject			Date
	No comments fo	ound	

- 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.

Туре	
Strategy	T)
Objective Perspective KPI	
Strategy	

note

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

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

Context	Туре		Perspective	
CCT Corporate 201112 -	Perspective	•	A Well-Run City	
			A Caring City A Safe City	
Subject			A Well-Run City	
			An Inclusive City	
	No com	ments fo	An Opportunity City All Items	

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

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



# SAP End-User Training Document SSM Reporting Manual



Comments linked t	mments linked to KPI 8A.2 % Improvement of responsiveness in service delivery					
Context	Туре	KPI			Reset F	Filters
CCT Corporate 2011	112 • KPI	<ul> <li>8A.2 % Improvement of re</li> </ul>	sponsiveness in service delive	- 🔽 Includ	le Expired 🛛 🕤 More	filters
Subject			Expired	Date	Author	
REASON FOR VARIANO	CE Q1		Y	09 Feb 2012	KARIN BEGBIE	
REASON FOR VARIANCE	E 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 V	VARIANCE Q1	Expiration Date 31 Dec 2	2011			
Related Groups SSM_US	SERS					
Description Target achieved.						
Average days to clos Actual = 11.20 days; Score = 100%	se: ; Target = 11.48 days					
Closure Rate: Actual =78%; Target	t = 79%					<b>↓</b>

- 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 OMore filters.

Comments linked to KPI 8A.	2 % Improvement of respon	siveness in service delivery	
Context CCT Corporate 201112 -	Type KPI 🗸	KPI         8A.2 % Improvement of responsiveness in service delive         ✓ Include Expire	Reset 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 Reset Filters
- o To hide filter options, click O Less filters.
- 8. Additional comment options New and Reply are displayed.

o New Reply are greyed-out if not available for use.

- 9. To leave the SM Comments window:
  - o Click Close or Close.





#### Scorecard Tab: Add Comments



Add Comments is available in

- Scorecard Tab: Objectives View Perspective Details
- <u>Scorecard Tab: Objectives View Objective Details</u>
- <u>Scorecard Tab: Scorecard Overviews View KPI Details</u>
- 1. Access Scorecard Tab.
- 2. To add a comment, next to **Comments**, 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.

New comment linked to Po	erspective: A Well-Run City	
Subject *	]	Associated Links
Comment *		URL
		Title
		Title
		URL
Expiration Date No expiration	1	Title
This commen	t doesn'''''''t expire	Groups Display Group Members Groups Selected *
		Admin SP06 Test >>
		JOH JOEKS
* Denotes require	1 field	<u>22</u>

- 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 data 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 Save
- 5. A system Message appears: Comment saved.
  - o Click
- 6. The newly created comment is indicated as unread: Comments 1.
  - o It can be read by clicking on Comments Or View.





Initiative

#### Scorecard Tab: Filtering

- 1. Access Scorecard Tab.
- 2. To filter displayed items, on the top right of the page, click SMore filters.

•

o To filter, click **T** for drop down lists under **Responsible**, **Status**, **Pathways**, or **Initiatives**.

o Click Reset Filters to remove any entered filters, and reset displayed objectives.

Pathways

o Click CLess filters to hide the filters.

Status

- 3. To filter items by hierarchy, click Dimension filters
  - o The SM Select one member window appears,

Dimensions	HIERARCHY <b>T</b>				
DEPARTMENT_BY_DIRECTOR. DIRECTORATE ORGANIZATIONAL_UNIT SCORECARD_HIERARCHY	City Corporate City Health City Manager Community Services Deputy City Manager Economic, Environment & Spatial Pla Economic, Environment & Spatial Pla Finance Human Settlements Safety & Security Social and Early Childhood Developm Tourism, Events and Marketing		City Corporate		
	Add All Members Add Marked >		Remove Marked	Remove All	
- Select a Dimens	sion (E.g. DEPARTMENT_BY_DIR	EC	TORATE).		
<ul> <li>Select a departr</li> </ul>	nent 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: <u>CITYweb</u> 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:

- <u>Scorecard Tab: Objectives View Perspective Details</u>
- Scorecard Tab: Objectives View Objective Details

#### Access Scorecard Tab

note

- 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.

		ALA. 3 30 1			
e.	digether Second D	Ner Hans			
-	A Georg Oby	A Bafe City	A Wall-flam Lity	An Inclusive City	An Opportunity Day
#17148	3.1 Through a court to second performance	21.1 Support steff and named reserves for Ashrophilamony	5.2 (His last out production alm in an attertion dail and	4.1 Costs provinement for subsport to be constantiated unit.	3.1 Course on weating exceptional or approxi- tionalization
	All frame attended today petitionen to permanel attant	2.2 Educe of all prove glower printing	0.1 (Inside invasible) sorts by the Author Growt	#2 Provide facilities in vision situates field at large	til formin province of pread observations
	3.5 Franks offician Description	2.4 Inspire energies, and arresp otherway record			1.3 Permin catangle announced longe resolute
	7.6 Provide officiers are particle management and particular				), A Multille vis an affinition public transport souther
	8.2 Procedu effective converg- legalith care percentes				
	1.4 Preside Jatislance slaver				

- 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.

🛃 Well Above 📒 Above 🔺 On Target 🛑 Below 😣 Well Below 🥕 Trend Up 🗕 Trend Stable 🎍 Trend Down





#### Scorecard Tab: Objectives View - Perspective Details

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

A Well-Run City	
5.2 Efficient and productive admin to prioritise delivery	
8	
3 Ensure unqualified audits by the Auditor General	
Note Perspective	A Well-Run City $\triangle$ , has a status of $\triangle On Target.$

- The status is informed by **Objective** 5.2 with a status of **Obje**
- The status is informed by **Objective** 5.3 with a status of **D**Above.
- 2. To view Perspective Details:

Viev	ıs	Objectives	Scorecard Overvie	ws			
Sco	recard						
Per	spectives	A Caring City		A Safe City	A Well-Run City	An Inclusive City	An Opportunity City
0	Click	on one c	of the displ	ayed <b>Perspecti</b>	ves, E.g.	n City	

3. The <u>Scorecard</u> > Perspective Details page appears.

	Objectives	Scorecard Overviews			
Scorecard>	Perspective Details				
A Well-Ru	n City				
		Score (%) 1	Descriptio	m	
		Calculation Method Arithmetic Average	Responsit	le	
		Objectives	Type Ex	ternal	
	1	5.2 Efficient and productive admin to prioritise delivery 5.3 Ensure ungualified audits by the Auditor General	Associate	d Links	
	2		Comment	5 🗆 🗸	iew Add
	3				
	4				
	5				
	5				
	5			Contra	Uproad
Objec	5 tives/KPIs		Status	Score (%)	Unread Comments
Objec	5 tives/KPIs ficient and productive	admin to prioritise delivery	Status	Score (%) 1	Unread Comments
Objec <u>5.2 Ef</u> <u>8A</u>	tives/KPIs ficient and productive 1 % 'Truly loyal' emp	admin to prioritise delivery loyees as measured (YT)	Status	Score (%) 1	Unread Comments
Objec <u>5.2 Ef</u> <u>8A</u> . 8A.	tives/KPIs ficient and productive 1 % 'Truly loyal' emp 2 % Improvement of	admin to prioritise delivery lovees as measured (YT) responsiveness in service delivery	Status Status	Score (%) 1 - 87.92	Unread Comments
Objec <u>5.2 Ef</u> <u>8A</u> <u>8A</u>	tives/KPIs ficient and productive 1 % 'Truly loyal' emp 2 % Improvement of 1 Comm satisfaction	admin to prioritise delivery loyees as measured (YT) responsiveness in service delivery score measured asym.scale(YT)	Status Status	Score (%) 1 - 87.92	Unread Comments
Objec 5.2 Ef 8A. 8A. 8C. 5.3 Er	tives/KPIs ficient and productive 1 % 'Truly loval' emp 2 % Improvement of 1 Comm satisfaction isure unqualified audit	admin to prioritise delivery loyees as measured (YT) responsiveness in service delivery score measured asym.scale(YT) ts by the Auditor General	Status Status	Score (%) 1 - 87.92 - 4	Unread Comments
Object 5.2 Ef 8A 8A 8C 5.3 Er 8B	tives/KPIs ficient and productive 1 % 'Truly loval' emp 2 % Improvement of 1 Comm satisfaction isure unqualified audit 1 Opinion of Auditor (	admin to prioritise delivery loyees as measured (YT) responsiveness in service delivery score measured asym.scale(YT) ts by the Auditor General General (YT)	Status Status	Score (%) 1 - 87,92 - 4 100	Unread Comments

Click <u>links</u> to proceed directly to <u>Scorecard</u> > Objective Details or KPI Details.

tip





 In <u>Scorecard</u> > Perspective Details: Objectives / KPIs for the selected perspective (E.g. A Well-Run City) are displayed.

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

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



KPI 8A.2 status is 🙋, putting Objective 5.2 and Perspective

A Well-Run City A at risk.

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



 In <u>Scorecard</u> > Perspective Details: Additional information for the selected perspective (E.g. A Well-Run City) is displayed.

A Well-Run City		
	Score (%) 1	Description
	Calculation Method Arithmetic Average	Responsible
	Objectives	Type External
1	5.2 Efficient and productive admin to prioritise delivery 5.3 Ensure ungualified audits by the Auditor General	Associated Links
2		Comments View Add
3		
4		
5		

- 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.
  - <u>View</u> or <u>Add</u> **Comments** for the Perspective.

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

note





#### Scorecard Tab: Objectives View - Objective Details

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



- 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 <u>Scorecard</u> > **Objective Details** page appears.

Objectives	Scorecard Overviews			_	_		_		Mar
card> Objective Details									
fficient and productive admin	to prioritise delivery	and the second se							
	Score (%) 1 Calculation Method Arithmetic Average KPIs SA,1 %5 Truly loyal employees as measured (VT) SA,2 %5 Improvement of responsiveness in service delivery SCu1 Comm satisfaction score measured asym.cclef.VT)	Description 5.2 Establish an efficient and pr Responsible Associated Links Comments <mark>View Add</mark>	oductive admin	istration (	hat priorit	izes delive	ery		
Perspectives, Objectives, H	(PIs		Trend	Status	Actual	Target	Score (%)	Lead/Lag	Unread Commen
CCT Corporate 201112									
							2		
A Caring City				4			3		
<u>A Caring City</u> <u>A Safe City</u> A Wall Bug City							3		
<u>A Caring City</u> <u>A Safe City</u> <u>A Safe City</u> <u>A Well-Run City</u> <u>B 5 2 Efficient a</u>	nd productive admin to priorities delivery.						3 4 3		
A Caring City     A Safe City     A Safe City     A Well-Run City     S.2 Efficient a     8A.1 % True	nd productive admin to prioritise delivery					35.00	3 4 3 1	Leading	
A Carino City     A Safe City     A Safe City     A Safe City     S.2 Efficient a     SA.1 % 'Tru     8A.2 % Imp	nd productive admin to prioritise delivery v loval' employees as measured (YT) rovement of responsiveness in service delivery		3		87.92	35.00	3 4 3 1 - 87.92	Leading	
	nd productive admin to prioritise delivery v loval" employees as measured (YT) rovement of responsiveness in service delivery satisfaction score measured asym.scale(YT)		L L	<ul> <li></li> <li><td>- 87.92 2.70</td><td>35.00 100.00 29.00</td><td>3 4 3 1 - 87.92 9.31</td><td>Leading Lagging Leading</td><td></td></li></ul>	- 87.92 2.70	35.00 100.00 29.00	3 4 3 1 - 87.92 9.31	Leading Lagging Leading	
A Carino City     A Safe City     A Safe City     A Safe City     S.2 Efficient a     SA1 % Tru     SA2 % Imp     SC1 Comm     An Inclusive City	nd productive admin to prioritise delivery (v loval' employees as measured (VT) rovement of responsiveness in service delivery satisfaction score measured asym.scals(YT)		ч —	<ul> <li></li></ul>	- 87.92 2.70	35.00 100.00 29.00	3 4 3 1 - 87.92 9.31	Leading Lagging Leading	

Click <u>links</u> to proceed directly to <u>Scorecard</u> > Perspective Details or KPI Details.

E.g. click <u>A Well-Run City</u> to proceed directly to <u>Scorecard</u> > Perspective Details.





4. Perspectives, Objectives, KPIs for the selected objective (E.g. <u>5.2</u>) are displayed.

Perspectives, Objectives, KPIs	Trend	Status
CCT Corporate 201112		
A Caring City		
□ <u>A Safe City</u>		
A Well-Run City		
5.2 Efficient and productive admin to prioritise delivery		8
8A.1 % 'Truly loyal' employees as measured (YT)		
8A.2 % Improvement of responsiveness in service delivery	R	
8C.1 Comm satisfaction score measured asym.scale(YT)	-	
□ An Inclusive City		
An Opportunity City		

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

8A.2	% Improvement of responsiveness in
serv	rice delivery
The r	notification system is an electronic recording
syste	on to capture service requests received from
custo	omers (internal and external).
The i	indicator measure, the % ac
Resp	onsible JUSTINE OUINCE

 In <u>Scorecard</u> > 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	Description 5.2 Establish an efficient and productive administration that prioritizes delivery
	Calculation Method Arithmetic Average	Responsible
	KPIs 8A:1 % 'Truly loval' employees as measured (VT) 8A:2 % Improvement of responsiveness in service delivery 8C:1 Comm satisfaction score measured asym.scale(VT)	Associated Links Comments D <u>View</u> 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.
  - <u>View</u> or <u>Add</u> **Comments** for the Objective.

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

note





## 12. PROCEDURE Scorecard Tab: Scorecard Overviews View

- \* Purpose of Procedure: Navigate the Scorecard tab, Scorecard Overviews View
- Location: <u>CITYweb</u> 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
- <u>Scorecard Tab: Scorecard Overviews View KPI Details</u>

#### Access Scorecard Tab

note

- 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.

Period 1	ieit punter •	An alise 30 Jun 1	ms 🕐 🔄	Destan Illara Basar Filant	(3)
en abound	Chieffes Second D	Nertines			
appendies -	A Daring Oby	A bate Dity	A Wall-flam Lity	An Inclusion Dity	An Opportunity Day
Otterinat	3.1 Providing access to senial pervises	2.1. Support steff and named redevenad for Ashryklingerig	5.2 Efficient entipendromen alministrativerities derivers	4.1 Costs provinement for stangers to be an elementated with	3.1 Depter to waiting anutationary atlant to attempt
	All frame anterarra tonian pethanon to provent) artist	2.3 States estatignees glover prices	5.1 Ensite insulfied sorts by the Author Ground	#2 Provide for Print in states States Poil at Inco.	La branch parameter and period observations
	1.2 Franks offician Emission Interview	2.4 Inpute discipation and along transport			1.3 Pinean tartangtie arrangement filmage restores
	2.6. Provide officitive arr particle reacaptions and patterner				3.4 Webster on an allerty in public to enable statemy
	8.2 Provide affective services legalith care participan				
	1.8. Frende jereteres store				

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





#### Scorecard Tab: Scorecard Overviews View

1. Access Scorecard Tab, Scorecard Overviews View.

Home Scorecard Strategy								
Time Period latest quarter 👻	As of 30 Jun 2012 🛄	Dimension filters	Re	iset Filters				G More Fi
iews Objectives Scorecard Overviews					Oper	n All Close A	I Select Fo	rmat Mark thi
icorecard								
Perspectives, Objectives, KPIs		Trend	Status	Actual	Target	Score (%)	Lead/Lag	Unread Comments
CCT Corporate 201112								
<u>A Caring City</u>						3		
3.1 Providing access to social services						5		
7A.1 Number of targeted development	programmes	7	<b>V</b>	25.00	20.00	125.00	Lagging	
E 3.2 Ensure innovative human settlemen	ts for increased access		8			1		
5B.1 No of housing opportunities provi	ded per vear	<i>w</i>	0	7,907.00	8,800.00	89.85	Lagging	
5B.2 Implemntation informal SetImt U	pgrade prog (UISP)&(EHP)	7	8	1,190.00	1,400.00	85.00	Lagging	
3.5 Provide effective Environmental Heat	Ith 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  $\mathbf{H}$ , or expanded  $\mathbf{H}$ .
- 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		
Caring City		
A Well-Run City		
☑ An Inclusive City		
<u>An Opportunity City</u>		

- 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					
O Perspectives, KPI					
Perspectives, Objectives, O	ectives, H	(PIs			
O Perspectives, Obje	ectives, I	initiatives			
O Perspectives, Obje	ectives, H	(PIs, Initiatives			
Select columns to display					
Trend	$\checkmark$	Previous Target		Responsible/Owner	
Status	$\checkmark$	Target % Change		Abnormal KPI Performance	
Actual	V	Perspective		Budget Status	
Target	$\checkmark$	Lead/Lag		Schedule Status	
Score (%)	$\checkmark$	Туре		Start	
Previous Actual		Unread Comments	<b>V</b>	Target End	
Actual % Change		Associated Initiative		Actual End	
				Select All Deselect All Resto	ore 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 I** is a useful selection.

- o <u>Select All</u>, <u>Deselect All</u> and <u>Restore Defaults</u> aid selection.
- OK o Click
- o The Scorecard Overviews View display is adjusted to your selection.
- 5. To bookmark this page, click Mark this page.

note See SSM Scorecard Menu: Mark this page.

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







#### 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 <u>Scorecard</u> > **KPI Details** page appears.

2 % Improvement of respon	siveness in service delivery	
Leve than 30 Determine 19 and 19.99 Determine 100 and 100 Determine 100 and 100 and 100 and 100 Determine 100 and 100	Neurone         Neurone           Arcsol 67:05         Trape 100.00           Strate [16:19:15]         Strate [16:19:15]           Strate [16:19:16]         Strate [16:10:16]           Strate [16:19:16]         Strate [16:10:16]           Otto Dec 2011         Strate [16:10:16]           Strate [16:10:16]         Strate [16:10:16]	Description The subficient in a specific reason in coding system to sature service movement resonance. On the schwarzene day a samely difference of the schwarzene day a same to a same t
Actual & Target 42 42 9 15 12 12 12 12 12 12 12 12 12 12 12 12 12		

4. In <u>Scorecard</u> > KPI Details: Additional information for the selected KPI (E.g. <u>8A.2</u>) is displayed.

Views	Objectives	Scorecard Overviews	
Scorecard >	> KPI Details		
8A.2 % Im	provement of responsive	eness in service delivery	
Les	<b>1</b> s than 90	Measures Actual 87.92 Target 100.00 Score (%) 87.92 Gap Performance -3.65 Stable Gap Performance Range [-1:1]	Description         The notification system is an electronic recording system to capture service requests received from customers (internal and external).           The indicator measure, the % achievement against a set improvement target, as an average of the follow More           Type Lagging - Quantitative           Associated Links         Breakdown of Indicator
Bet Bet Bet Mar	ween 90 and 99,99 ween 99,99 and 100 ween 100 and 110 e than 110	Score History           OctDec 2011         JanMar 2012         AprJun 2012           98.94         ▶         94.59         ▶         87.92         >	Responsible JUSTINE QUINCE Objectives 5.2 Efficient and productive admin to prioritise delivery Perspective A Well-Run City Comments D View Add

- 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?"

## note

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. OPA 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 <u>Scorecard</u> > **Objective Details**.



See Scorecard Tab: Objectives View - Objective Details.

- **Perspective** lists the relevant Key Pillar (E.g. A Well-Run City).
- <u>View</u> or <u>Add</u> **Comments** for the KPI.

note See Scoreca

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.

Time Pe	riod	latest month 👻		As of 30 Sep 2011	Dimension filters	Re	set Filters	5				G More F
Views Scorecar	d	latest quarter latest quarter (to date) latest year latest year (to date)	Scorecard Overviews						<u>Open Al</u>	I <u>Close A</u>	l <u>Select Fo</u>	rmat <u>Mark th</u>
	Persp	ectives, KPIs				Trend	<u>Status</u>	Actual	Target	Score (%)	Lead/Lag	Unread Comments
1	Opera	ational Performance								3		
		Average Days to Close	<u> </u>			-		11.20 78.50	11.48 79.23	100.00 99.08	Lagging Lagging	
		Overall Indicator				-	Ŏ	99.54	100.00	99.54	Lagging	
			Vell Above	Above 🔺 On Target 🌒 Below 🔇 V	/ell Below 🔎 Trend Up 🗕 Trend	Stable	Trend	Down				



note

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 <u>Actual vs. Target</u> 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.

. Select a graph type	
111 Int 🚄 🕒 Int li	
Bar Line Statked Area Ine Barh 2.8	ers & 1 Bar & 2 St
Dual Y axis	ALL ADDAR NO
. Select items to graph	
04.2 % Improvement of responsiveness in service delivery	
15. 7 % Improvement of responsiveness in service delivery	
over a subjectement of responses on the rise period	
one of surprogramming to response strates of the endergenery.	
ALL I INDUSTRIALS IN PROPERTY STORE IN HIS PAGE SHOPPING	
nort i finiti o finitino su patro ma surra una ano ano ano fi	
en al sufficialmente o l'adorationes a se and morale à	
elected items	Туре
elected items 13.2 % Improvement of responsiveness in service derivary	Type Bar
elected items. 52.3 % Improvement of responsiveness in service device 54.3 % Improvement of responsiveness in service device 54.3 % Improvement of responsiveness in service device	Type Bar Line Line
elected items 5.3 % Improvement of responsiveness in service derivery 5.3 % Improvement of responsiveness in service derivery 5.3 % Improvement of responsiveness in service derivery	Type Bar Line Line
elected items Es.2 % Improvement of responsiveness in service derivery S.2 % Improvement of responsiveness in service derivery S.2 % Improvement of responsiveness in service derivery	Type Bar Line Line
elected items. 14.3 % Improvement of responsiveness in service delivery 14.3 % Improvement of responsiveness in service delivery 14.3 % Improvement of responsiveness in service delivery	Type Bar Line Line

- o Adjust Settings and Options as desired.
- o Click Apply to save changes, then OK to close the window.
- 7. <u>Drill</u> displays the Measures Actual, Target, Score (%) and Gap Performance for the last quarter (E.g. AprJun 2012).

Actual vs. Target   Drill   Comparison Focus DEPARTMENT_BY_D 🗸 🕅 Show Par							
	Actual	Target	Score (%)	Gap Performance			
City Corporate	87.92	100.00	87.92 🔇	100.00 🍠			

By clicking on <u>City Corporate</u> all underlying directorates, and the departments under them are expanded and displayed.

8. <u>Comparison</u> displays a quarterly comparison for the *City Corporate* scorecard.



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





# 13. PROCEDURE Home Tab: Navigation

- Purpose of Procedure: Navigate the Home tab.
- Location: <u>CITYweb</u> 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

#### 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.
- and the second se

3. CI	Ck Home	Home	Tab.
-------	---------	------	------

				Customia
My Bookmarks		Organize	System Message	
			Q4.2011/12 Please note that 1A.1 Capital budget spend (Billions) and 8B.3 Percentag Capital budget spent (NKPI) :- (a) are reflective of the recorded SAP actuals as at 16.07.2012; and (b) are subject to amendment during preparation of the AFS.	e of City's
			Operational Reviews	Nev
			operational reviews	
	-		operational netrews	
My Performance	Summary	Edit	operational networks	
My Performance All Objectives (17)	Summary 3 below target	Edit		
My Performance All Objectives (17) All KPIS (42)	Summary 3 below target 6 below target	Edit 1 trending down		
My Performance All Objectives (17) All KPIS (42)	Summary 3 below target 6 below target	Edit		
My Performance All Objectives (17) All KPIs (42)	Summary 3 below target 6 below target	Edit		

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

- Home Tab: System Message
- Home Tab: Operational Reviews
- Home Tab: My Alerts





## Home Tab: Customize

tip

- 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	n to display and drag them to the pre	ferred location	
Uncheck the panels to hide them			
Bookmarks	System Message		
Performance Summary	Operational Reviews		
	Alerts		
	☑ External Content Links		
- All blocks are auto	matically 🔽 selected	to display	on your <b>Home</b> tab.
- 🔲 Un-tick blocks	to hide them on your <b>H</b>	<b>lome</b> tab	

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

- Click Close or Close.





#### Home Tab: My Bookmarks

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

My Bookmarks	Organize
--------------	----------

Key Pillars

o E.g. The Key Pillars bookmark shown above.

note

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 Rename to change the label.
    - Click Delete to remove the bookmark.
    - Click Close 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.

My Performance Sun	nmary		Edit
All Objectives (17)	3 below target		
All KPIs <u>(42)</u>	6 below target	1 trending down	
Performance results are indicate	ed according to the Sc	orecard key.	
Well Above Above 💧 On Target	Below 🛛 Well Below	7 Trend Up — Trend Stable	N Tre

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

Perspectives	A Caring City 🛛 🔇	A Safe City	A Well-Run City 🛛 😣	An Inclusive City	An Opportunity City
Objectives	3.2 Ensure innovative human settlements for increased access		5.2 Efficient and productive admin to prioritise delivery		1.2 Provide economic and social infrastructure
	8		8		•
		💟 Well Above 📒 Above 🔺 On Ta	arget 🛑 Below 🔇 Well Bel	low Abnormal KPI Performance	

- o E.g. Clicking on the <u>6 below target</u> 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**.

ws	Objectives	Scorecard Overviews																			Open All	Close /	dl <u>Sele</u>	ct Fo	rmat Mark th
oreca	and the second se																								
1	Perspectives, KPIs															In	and	Status	Actu	al	Target	Score	Lead/	Lag	Unread
	CCT Corporate 201112																					(70)			Commences
	A Caring City																	8				1			
	5B.1 No of housing	opportunities provided per y	er year	<u>vear</u>	<u>ir</u>											-	-	8	7,907	.00	8,800.00	89.85	Lagg	ing	
	5B.2 Implemntation	n informal SetImt Upgrade pr	prog (l	rog (U	UISP)&(EF	HP)										-	-	$\mathbf{x}$	1,190	.00	1,400.00	85.00	Lagg	ing	
	E A Safe City																								
	A Well-Run City																	8				1			
	8A.2 % Improveme	ent of responsiveness in serv	ervice d	vice d	a delivery											1	1		87	.92	100.00	87.92	Lagg	ing	
	□ An Inclusive City																								
	An Opportunity City																					2			
	1A.1 Capital budge	t spend (Billions)														-	-		4	.17	4.33	96.23	Lagg	ing	
	1A.4 % of Building	plans finalised within timefra	frames	mes	<u>85</u>											-	-		73	.60	75.00	98.13	Lagg	ing	
	8B.3 Percentage of	City's Capital budget spent	nt (NKP	(NKPI	KPI)											-	-		91	.42	95.00	96.23	Lagg	ing	





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

All Initiatives		Selected Initiatives
	>>	
All Objectives		Selected Objectives
3.8 Provide substance abuse treatment & 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	>>	5.2 Efficient and productive admin to prioritise delivery
		Selected KPTs
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 la 8A.4 % Budget spent on implementation of WSP for the	>>	8A.2 % Improvement of responsiveness in service delivery

- 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 with the selected Objectives.



- 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 with the selected KPIs.
- 7. To save selections for monitoring, click Save
  - o A system message appears: Save completed
  - o Click
- 8. Items selected for monitoring appear under My Objectives, and My KPIs.

My Performance Summary										
All Object	ives (17)	•	3 below target							
All KPIs (	42)	•	6 below target	1 trending down						
My Objectives										
	Status									
	5.2 Efficient and productive admin to prioritise delivery									
My KPIs										
Trend	Status									
ĸ	8	8A.2 % Improve	ment of responsivene	ess 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
	>>	
	<<	
Alert me when an event below occurs on selected initiatives		
Date, status, or milestones changed		Notification sent immediately
Milestone will slip behind schedule in 3 days		Notification sent nightly
Comment was added		Notification sent immediately
All Objectives		Selected Objectives
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
5.2 Efficient and productive admin to prioritise delivery 5.3 Ensure unqualified audits by the Auditor General	<<	
Alert me when an event below occurs on selected objectives		
Objective status changed from last period		Notification sent nightly
Objective comment was added		Notification sent immediately
All KPIs		Selected KPIs
7A.2 No of days when air pollution exceeds WHO guidelir 8A.1 % 'Truly loyal' employees as measured (YT) 8A.2 % Improvement of responsiveness in service delive 8A.3 % People from FE targ groups employed - 3 mgmt	>>	8A.2 % Improvement of responsiveness in service delivery
Alert the when an event below occurs on selected KPIS		
KPI status changed from last period		Notification sent nightly
✓ KPI comment was added		Notification sent immediately
Notification (across all contexts)		
Display notification in home page     Display notification in home page		





- 4. To add an objective alert:
  - o In All Objectives, click on an objective to select it.
    - Click *Click* 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**.



tip

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 locopy 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: WKPI 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 Save
  - 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: <u>CITYweb</u> 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*.







o The Key Pillars Diagram View is displayed by default.





#### Strategy Tab: Key Pillars View

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

Pillais					
Key Pil	lars				
A Caring Cit	ν.				
A Safe City	6				
A Well-Run	City				
An Inclusiv	e City				
An Opportu	nity City				
0.000					
A Well-R	un City				
			$\frown$		
spectives	A Caring City	A Safe City	A Well-Run City	An Inclusive City	An Opportunity City
			and the second sec	and the second s	An opportunity city
ectives	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
ectives	3.1 Providing access to social services 3.2 Ensure innovative human settlements for increased access	2.1 Expand staff and capital resources for Safety&Security 2.3 Enhance intelligence- driven policing	5.2 Efficient and productive admin to prioritise delivery 5.3 Ensure ungualified audits by the Auditor General	<ul> <li>4.1 Create environment for citizens to be communicated with</li> <li>4.2 Provide facilities to make citizens feel at home</li> </ul>	1.1 Creats an enabling environment to attract invastment     1.2 Provide economic and social infrastructure
ectíves	3.1 Providing access to social services 3.2 Ensure Innovative human settlements for increased access 3.5 Provide effective Environmental Health services	2.1 Expand staff and capital resources for Safety&Security 2.3 Enhance intelligence- driven policing 2.4 Improve emergency staff through affective training	5.2 Efficient and productive admin to prioritise delivery 5.3 Ensure ungualified audits by the Auditor General	4.1 Create environment for citizens to be communicated with 4.2 Provide facilities to make citizens feel at home	1.1 Create an enabling environment to attract investment     1.2 Provide economic and social infrastructure     1.3 Promote sustainable environment through resources
ectives	3.1 Providing access to social services 3.2 Ensure innovative human settlements for increased access 3.5 Provide effective Environmental Health services 3.6 Provide effective air quality management and pollution	2.1 Expand staff and capital resources for Safety&Security 2.3 Enhance intelligence- driven policing 2.4 Improve emergency staff through affective training	5.2 Efficient and productive admin to prioritise delivery 5.3 Ensure unqualified audite by the Auditor General	<ul> <li>4.1 Create environment for citizens to be communicated with</li> <li>4.2 Provide facilities to make citizens feel at home</li> </ul>	<ol> <li>Create an enabling environment to attract invastment</li> <li>Provide economic and social infrastructure</li> <li>Promote sustainable environment through resources</li> <li>Hobility via an effective public transport system</li> </ol>

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
<b>Objectives</b> 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.





5.2 Efficient and productive

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

Comments linked to Perspect	ive A Well-Run City		
Context	Туре	Perspective	
CCT Corporate 201112 🔹	Perspective 👻	A Well-Run City 🗸	-
See Scorecard	d Tab: View Comments t	for available functionality.	

- o Click  $\bowtie$  to close the window.
- 4. To see further **Objective** information, click on the desired block (E.g.



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

See Scorecard Tab: View Comments for available functionality.

o Click  $\bowtie$  to close the window.

tip

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



- o Description, Responsible and Associated Links are displayed.
- 6. 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.







- 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 Save



#### o If a Save As window appears.

Organize - New folde	er -	955.	• 0
★ Favorites ■ Desktop	Documents library Includes: 2 locations	Arrange by: Fo	older 🔻
Downloads	Name	Date modified	Туре
Desktop Libraries Documents My Document Mubic Docum Music Pictures	B) My Music     My Music     My Fictures     My Pictures     My Videos     My Videos	2012/06/15 07:14 2009/07/14 07:08 2012/06/15 07:14 2009/07/14 07:08 2012/06/15 07:14 2009/07/14 07:08	File fold File fold File fold File fold File fold File fold
Videos -	. m.		
File <u>n</u> ame: DP_f	nal_for_setting_Council_Approved280512.pdf = Acrobat Document		

- The File name is defaulted.
- Browse to the folder you wish to save the file in.
- Click Save
- 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 example to close it.

note





## **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).

note

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]

note

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.

Preferences Set Defaults H	lelp			
User: SSM PIP admin Database 201112_Entry_A	pproval 👻	Period 01	Mar 2012	Refresh
My Metric Sets			Historical Data Target Da	ta Approval Log
Metric Set	Setup	Data Entry	Data Approval	Completed
1A.2 EPWP(TAR)	Admin	SSM PIP admin	Zimkhita Buwa	

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





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

Setup	Data Entry	Data Approval	Complete	d			
ielect a Metric Set to Display below: 1A.2 EPWP(TAR)	•	T Display Pr	evious Period Actu	al No.	umeric format 123 v change, <u>set your</u>	,456,789.00 preferences	
1A.2 EPWP(TAR)		Download to E	and metterst	Historical Data	Apple allast	Sec.	Submit for Approval
Metric	DEPARTME	NT_BY_DIRECTORAT	DIRECTORATE			Actual	Target
EPWP Opp	Housing M	anacement	Human Settlem	ents			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.

note

note

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

- o Click Submit
  - note

note

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 Scorecored. It is therefore recommended that it also be captured in <u>Scorecard</u> <u>Tab: Add Comments</u> for the particular metric (KPI).





5. The Data Entry Page is automatically refreshed.

Setup Data Entry	Data Approval	Completed								
ielect a Metric Set to Display below: 1A.2 EPWP(TAR)										
1A.2 EPWP(TAR)	Download to Exc	cel Refresh	Historical Data	Approval Log	Save	Submit for Approval				
Metric Di	EPARTMENT_BY_DIRECTORAT	DIRECTORATE			Actual	Target				
EPWP_Opp H	lousing Management	Human Settlemen	ts			16,500 00				
The process flo value is grey, i	ow diagram illustrat ndicating data is ca	tes Data	Approval is nd submitt	the next ed, and o	step. can no	The <b>Target</b> fid longer be ed				

- o Click Entry and Approval Home
- 6. The Entry and Approval Home page reappears.
  - 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.

	My Metric Sets			Hist	corical Data Target Data	Approval Log
	Metric Set	Setup	Data Entry		Data Approval	Completed
	1A.1 Direct Job Opp(ACT)	Admin	Zimkhita Buwa		SSM PIP admin	
0	Click	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.



note

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.

Preferences Set Defaults P	leip			
User: SSM PIP admin				
Database zcoctcorp1pbi	Period 01 Dec 2	009		Rafres
Mir Metor Sets			Tank Con Tank	tura la secult
THY MOULE Sets.			and the second se	Called Trit Contractor
Metric Set	Setup	Data Entry	Data Approval	Completed
Metric Set 1A:1 Direct Job Opp(ACT)	Setup Admin	Data Entry Zimkhita Buwa	Data Approval SSM PIP admin	Completed
Metric Set 1A.1 Direct Job Opp(ACT) 1A.1 Direct Job Opp(TAR)	Setup Admin Admin	<b>Data Entry</b> Zimkhita Buwa Zimkhita Buwa	Data Approval SSM PIP admin SSM PIP admin	Completed
Metric Set 1A.1 Direct Job Opp(ACT) 1A.1 Direct Job Opp(TAR) 1A.2 Direct Investm(ACT)	Setup Admin Admin Admin	Data Entry Zimkhita Buwa Zimkhita Buwa <u>SSM PIP admin</u>	Data Approval SSM PIP admin SSM PIP admin <u>SSM PIP admin</u>	Completed

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

Setup Dat	a Entry Data Approval	Completed			
Select a Metric Set to Display below: 1A.2 EPWP(TAR)	•		Numeric forr To change, <u>s</u>	mat 123,456,789.00 set your preferences	
1A.2 EPWP(TAR)			Historical Data	Approval Log	Reject Approve
Metric	DEPARTMENT_BY_DIRECTORATE	DIRECTORATE		Actual	Target
EPWP_Opp	Housing Management	Human Settlements			16,500.00
note					

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

**Note** information is stored on the *Approval Log*, but not automatically pulled through to the SSM Scorecored. It is therefore recommended that when data is approved, a confirmation note is also captured in <u>Scorecard Tab: Add Comments</u> 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 Reject
  - The Add a Note window appears.
  - Type in "REASON FOR REJECTION:" and enter the necessary details.
  - Click Reject
  - 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 I	Data Approval Log
Metric Set	Setup	Data Entry	Data Approval	Completed
1A.1 Direct Job Opp(ACT)	Admin	Zimkhita Buwa	SSM PIP admin	
1A.1 Direct Job Opp(TAR)	Admin	Zimkhita Buwa	SSM PIP admin	
1A.2 Direct Investm(ACT)	Admin	SSM PIP admin	SSM PIP admin	✓

- 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 Approv	al	Completed
1A.2 EPWP(TAR)	Admin	SSM PIP admin		P admin	

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.

note





### 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.

note

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.

My Metric Sets			Historical Data	Target Data	Approval Log
Metric Set	Setup	Data Entry	Data Approv	al	Completed
1A.2 EPWP(TAR)	Admin	SSM PIP admin		admin	

- 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.

Setup	Data Entry	Data Approval	Completer	i - )			
Select a Metric Set to Display b 1A.2 EPWP(TAR)	elow:	□ Display P	revious Period Actua		Vumeric format 123 To change, <u>set your</u>	,456,789.00 preferences	
1A.2 EPWP(TAR)		Downjour to P	col sercer	Historizat Data	Approvalues	144	Submit for Approval
Matric	DEPARTMENT	BY_DIRECTORAT	DIRECTORATE			Actual	Target
EPWP_Opp	Housing Manag	ement	Human Settleme	nts			16.500 00

note

The process flow illustrates the \_\_\_\_\_\_\_\_\_ 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.

note

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





o Click Submit

note

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 Scorecored. It is therefore recommended that it also be captured in <u>Scorecard</u> <u>Tab: Add Comments</u> for the particular metric (KPI).

5. The Data Entry Page is automatically refreshed.

Setup Data En	Itry Data Approval	Completed		
Select a Metric Set to Display below: 1A.2 EPWP(TAR)	Display Prev	vious Period Actual	umeric format 123,456,789.00 o change, <u>set vour preferences</u>	0
1A.2 EPWP(TAR)	Download to Exc	el Refresh Historical Data	Approval Log Seve	Submit for Approval
Metric	DEPARTMENT_BY_DIRECTORAT	DIRECTORATE	Actual	Target
EPWP_Opp	Housing Management	Human Settlements		16,500.00
The process to value is grey,	flow diagram illustrat , indicating data is ca	tes Data Approval is aptured and submit	the next step. ted, and can no	The <b>Target</b> fid b longer be ed

- o Click Entry and Approval Home
- 6. The Entry and Approval Home page reappears.
  - 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.

My Metric Sets			Historical Data	Target Data	Approval Log
Metric Set	Setup	Data Entry	Data Approv	al	Completed
1A.1 Direct Job Opp(ACT)	Admin	Zimkhita Buwa	SSM PIP adr	nin	
o Click	exit the page.				





# Appendix A - References

### References

- [1] Information Quotes: http://www.decision-making-solutions.com/information\_guotes.html
  - Quote: William G. Pollard (1911 1989), American Physicist
  - o Quote: Peter F. Drucker, (1909 2005), Author and Teacher
  - o Quote: William Feather, (1889 1981), Author and Publisher
- [2] Integrated Development Plan (IDP)
  - o Approved IDP 2012-2017
    - > City Managers foreword: Achmat Ebrahim (City Manager).
  - o 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
- o Margaret Rouse: <u>corporate-performance-management</u>; <u>business-intelligence</u>
- o 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



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## Scorecard Time-schedule

ltem 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 via joint Ward Committee meetings per Sub-councils	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
	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
3	d) 2012/13 First Quarter Directorate and Department SDBIPs to PC's and MayCo	Nov'12
5	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
	2nd Quarter and Annual Performance Reporting:	lan/Feh'13
	a) 2012/13 Second Quarter (mid year) Corporate Performance Report to MayCo and Council	
6	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)	Feb'13
	<ul> <li>b) Completion of 2013/14 Draft:</li> <li>Directorate Executive Summaries and SDBIPs</li> <li>Departments Business Plans and SDBIPs to all Portfolio Committees, MayCo</li> </ul>	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:	lun/lul'13
	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	<ul> <li>Approval of 2013/14 IDP incl. Corporate Scorecard and budget:</li> <li>a) Council must give final approval of the IDP incl. Corporate Scorecard &amp; 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</li> </ul>	May'13





ltem 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
	<ul> <li>d) Approval of 2013/14 Final:</li> <li>Directorate Executive Summaries and SDBIPs</li> <li>Departments Business Plans and SDBIPs to all Portfolio Committees, MayCo &amp; Council</li> </ul>	May'13
	<ul> <li>e) City Manager gives Draft 2013/14 Corporate SDBIP to the Executive Mayor for consideration, 14 days after approval of the budget</li> </ul>	May'13
10	Public Making and Compliance:	Jun'13
	<ul> <li>a) Submit final 2013/14 IDP incl. Corporate Scorecard document to MEC of Local Government within 10 days after Council approval</li> </ul>	Jun'13
	<ul> <li>b) Executive Mayor to approve 2013/14 Corporate SDBIP within 28 days after approval of budget</li> </ul>	Jun'13
	<ul> <li>c) Place all 2013/14 Directorate Executive Summaries and SDBIPS; and Department Business Plans and SDBIPs on website</li> </ul>	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.