

# Getting Started

Package Selected:    **Basic** ✓    **Standard**    **Advanced**

This package comprises of the following features:

- Basic Scorecard Calculator
- Access to Sector Charter Scorecards
- Upload bulk data from Spreadsheets
- Digital Audit

## Open Door policy

We are eager to optimize the value for received from our solutions, if there is anything that is unclear please contact us.

## Let's train up!

### Basic Scorecard Calculator

The scorecard calculator calculates a score based on the data that is uploaded per element. It provides a real time analysis of where you are as a company in your compliance journey. We have found that optimal tracking is done monthly, let's see how to create our monthly scorecard:

Step 1: Go to scorecards and select "view all" as shown below:

The screenshot displays the Mpowered Business Solutions dashboard. At the top, there is a navigation bar with 'Dashboard' selected, and other options like 'Accounts', 'Users', 'Tools', 'Data', 'Statistics', and 'Logout Sillindile'. Below the navigation bar, there is a 'SWITCH TO' section with buttons for 'Dashboard', 'Scorecards', 'Scenarios', 'Target scorecards', 'Implementation plan', and 'Verification checklist'. The main content area is divided into several sections:

- SCORECARDS:** A section titled 'January – December 2019' with a status 'You are non-compliant' and 'FY 2019 (Revised CoGP)'. It features a bar chart comparing 'Actual' (blue) and 'Max' (purple) scores across categories: Own, Man, SD, ESD, and SED. The 'Max' score for ESD is significantly higher than the 'Actual' score. Below the chart, there are two buttons: 'Open scorecard' and 'or view all', with a red arrow pointing to the 'or view all' text.
- SCENARIO PLANNER:** A section with the text 'Measure the impact of different Initiatives on your B-BBEE scorecard' and a 'Go to scenario planner' button.
- TARGET SCORECARDS:** A section with the text 'Set goals for what you want to achieve on your B-BBEE scorecard' and an 'Open target scorecards' button.
- IMPLEMENTATION PLANNER:** A section with the text 'Create and delegate action items to expedite the implementation of your scenario goals' and a 'Go to implementation planner' button.
- VERIFICATION MANAGER:** A section with the text 'Manage the gathering of all documents required for the verification process' and a 'Go to verification manager' button.

Step 2: Step 1 will take you to the screen below, once you are there, select 'New Generic or QSE Scorecard'.

Scorecard Calculator | Mpowered Business Solutions | Accounts | Users | Tools | Data | Statistics | Logout Silindile

SWITCH TO: Dashboard | Scorecards | Scenarios | Target scorecards | Implementation plan | Verification checklist

Your Scorecards

This is the Scorecard Calculator, here you can calculate your company's BBBEE compliance level by capturing data about your company. Create a new Scorecard or click on an existing Scorecard's description to open it.

Your Scorecards

Filter  Show Archived Scorecards

Description	Level	Size	Scorecard Period	Charter	Financial Year	
FY 2018	Non-compliant	Generic	01 Jan '18 - 31 Dec '18	Revised CoGP	2018	***
FY 2019	Non-compliant	Generic	01 Jan '19 - 31 Dec '19	Revised CoGP	2019	***

New Generic Scorecard | New QSE Scorecard

Step 3: Complete the necessary fields provided with the information pertaining to the scorecard parameters and select the save button to create the scorecard. Please note that for Revised CoGP you will need to tick the box under the heading 'Apply 2019 Amendments?' to generate a scorecard with the amendments released in May 2019.

Scorecard Calculator | Mpowered Business Solutions | Accounts | Users | Tools | Data | Statistics | Logout Silindile

### Create a new Generic Scorecard

Description of the scorecard

Give the scorecard a **name** that will help you keep track of what it is

Measurement date  
 The **date** on which you are being verified  
 2019 | November | 6

Financial period  
 Select the **financial period** on which the scorecard will be based  
 2019 | November | 6 to 2019 | November | 6

Charter  
 Select the BBBEE charter  
 Revised CoGP

Region  
 Select the **region** from which EAPs will be drawn

Apply 2019 amendments? (BETA)  *(Red arrow points here)*  
 Do you want to apply the amendments published on 31 May 2019?  
 Note: The amended calculations are being tested by several of our consulting and audit partners. Some details may change during this process. We will send out an email to notify you as soon as our partners have finalised the testing process.

Copy existing data  
 Select an existing scorecard to have its data copied to this new scorecard  
 Don't copy anything

or

What is Copy existing data?

This feature can be used to copy data loaded in a scorecard to a newly created scorecard. It is typically used when monthly Year to date scorecards are created to save the user time by only uploading element data for that month as prior months data has already been copied over.

Step 4: After clicking on the save button you will be taken to the list of scorecards created. To open the scorecard, click on the description of the scorecard you want to populate with data.

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Your Scorecards

Filter  Show Archived Scorecards

Description	Level	Size	Scorecard Period	Charter	Financial Year
FY 2018	Non-compliant	Generic	01 Jan '18 - 31 Dec '18	Revised CoGP	2018
FY 2019	Non-compliant	Generic	01 Jan '19 - 31 Dec '19	Revised CoGP	2019

[New Generic Scorecard](#) [New QSE Scorecard](#)

There you go! Your scorecard is created.

### Access to Sector Charter Scorecards

You would have noticed when creating your scorecard, that the drop down menu under charters has more than 1 applicable charter. We have coded the most commonly used charters and continue to add charters to the system. Each charter will have customised templates unique to that Sector Charter.

### Upload bulk data from Spreadsheets

Your scorecard is created, now let's see how to upload data in bulk:

Step 1: Click on "Calculate a Scorecard" from the dashboard page, as depicted below

The dashboard screenshot shows the 'SCORECARDS' section with a 'You are non-compliant' message for January - December 2019. A bar chart displays 'Actual' (blue) and 'Max' (purple) values for categories: Own, Man, SD, ESD, and SED. The 'Open scorecard' button is highlighted with a red arrow.

Category	Actual	Max
Own	~25	~25
Man	~18	~18
SD	~18	~18
ESD	~42	~42
SED	~5	~5

Step 2: Select the scorecard you wish to upload information to by clicking on the description of the scorecard.

This is the Scorecard Calculator; here you can calculate your company's BBBEE compliance level by capturing data about your company. Create a new Scorecard or click on an existing Scorecard's description to open it.

#### Your Scorecards

Filter

Show Archived Scorecards

Description	Level	Size	Scorecard Period	Charter	Financial Year	
FY 2018	Non-compliant	Generic	01 Jan '18 - 31 Dec '18	Revised CoGP	2018	***
FY 2019	Non-compliant	Generic	01 Jan '19 - 31 Dec '19	Revised CoGP	2019	***

[New Generic Scorecard](#) [New QSE Scorecard](#)

**Step 3: Select the element you wish to upload data for by clicking on the name in the blue bar.**

The screenshot shows the 'Scorecard Calculator / FY 2019' interface. The top navigation bar includes 'Accounts', 'Users', 'Tools', 'Data', 'Statistics', and 'Logout Mitishka'. Below this is a 'SWITCH TO' section with buttons for 'Dashboard', 'Scorecards', 'Scenarios', 'Target scorecards', 'Implementation plan', and 'Verification checklist'. The main navigation bar is blue and contains several categories: 'Your Scorecards', 'General Information', 'Ownership Information', 'Management Control', 'Skills Development', 'Enterprise & Supplier Development', 'Socioeconomic Development', 'Y.E.S Participation', and 'Scorecard Insights'. A red arrow points to the 'Management Control' button. Below the navigation bar, the 'Management' section is active, showing 'Maximum points: 19.00' and 'Actual points: 0.00'. There are buttons for 'Summary View' and 'Detailed View', and a 'Help & Definitions' link.

**Step 4: Once in the relevant element, select "From a Spreadsheet". After selecting this button, you will see the following page:**

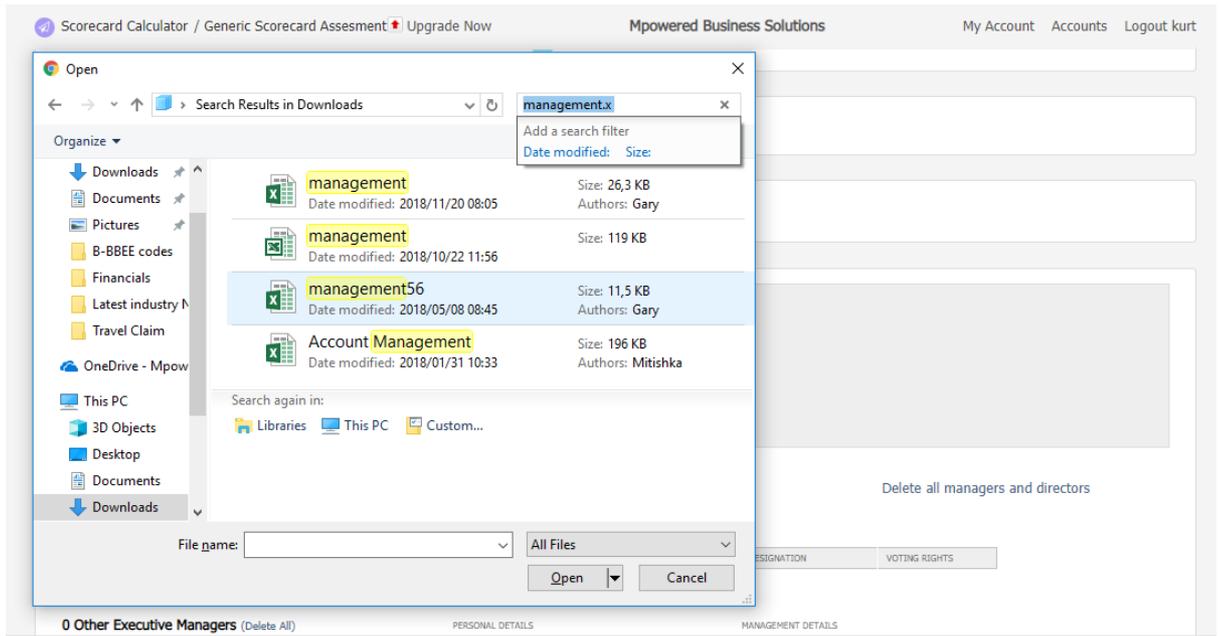
The screenshot shows the 'Import Data' page within the 'Management Control' section. The top navigation bar is the same as in the previous screenshot. Below the navigation bar, the 'Management' section is active, showing 'Maximum points: 19.00' and 'Actual points: 0.00'. There are buttons for 'Summary View' and 'Detailed View', and a 'Help & Definitions' link. The main content area is titled 'Import Data' and contains the following instructions:

1. Download the spreadsheet template here - management.xlsx
2. After populating it, submit the spreadsheet using the field below.

Below the instructions is a file upload field with a 'Choose file' button and the text 'No file chosen'. There is also a green 'Save' button.

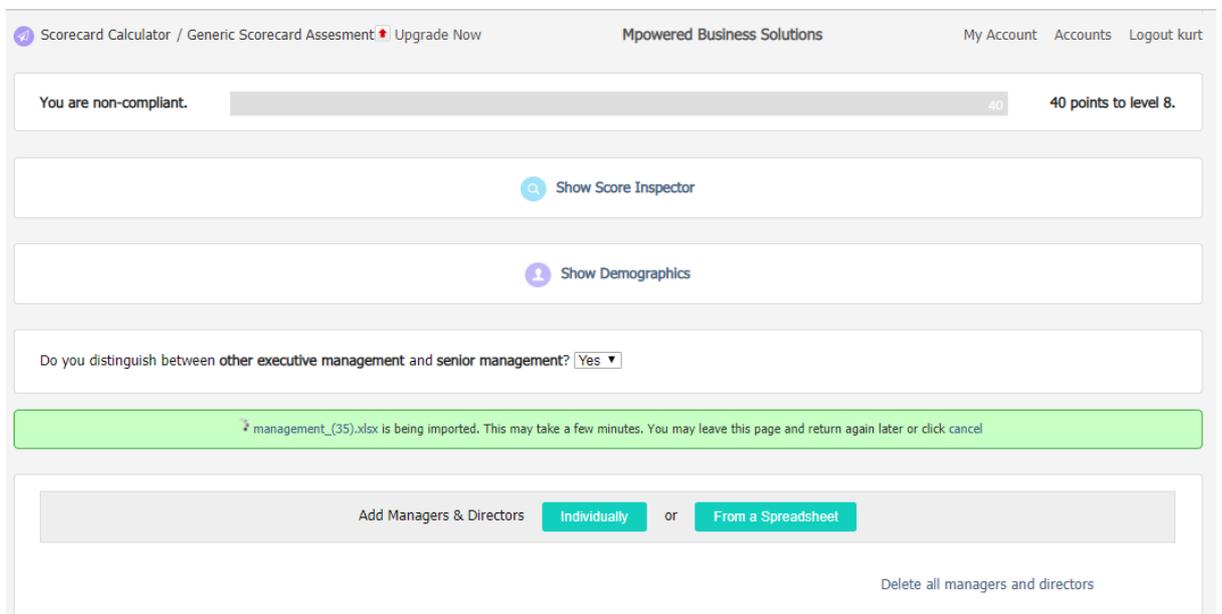
You must use the template that the system prompts in number 1 on the screenshot. The spreadsheet has predefined data requirements which are specified in the worksheets of the Excel document. For columns with drop-downs, please only select values from this drop-down. Please note, if you are copying from another source, that you select "Paste Values" when pasting copied data as normal pasting may overwrite the drop-down functionality.

**Step 5: Once you have populated and saved the template, click on "Choose File" or "Browse" to select that template for the upload.**



Step 6: Select the save button to begin your data upload.

Step 7: While the document is uploading you will see a green bar near the top of the screen, showing that the spreadsheet is being uploaded. Depending on certain factors, including internet connection and spreadsheet size, the data may upload without this banner appearing.



Step 8: If there was a problem with the data or the spreadsheet, the system will display a red bar instead of green bar as indicated below

Scorecard Calculator / Generic Scorecard Assessment ● Upgrade Now Mpowered Business Solutions My Account Accounts Logout kurt

You are non-compliant. 40 40 points to level 8.

[Show Score Inspector](#)

[Show Demographics](#)

Do you distinguish between **other executive management** and **senior management**? Yes ▾

The spreadsheet `management_(35).xlsx` could not be imported.

[View the errors](#) or cancel

**Spreadsheet errors**

Row 13 : Designation is invalid. Select a designation from the drop-down provided.

Step 9: If there was an issue with your data, you will note a "View the Errors" button. If you click on this button, the system will display the row number as well as the error that that row contains. You can now go back to the original files to review the erroneous data and, once the errors have been rectified, upload the file.

If there was an issue with your spreadsheet itself, e.g. using the wrong spreadsheet, you will be prompted to re-download the spreadsheet template. Please ensure to use the latest spreadsheet template as older spreadsheet templates may not be supported.

### Digital Audit

You may or may not see features relating to the verification process throughout the Scorecard calculator. To find out more about how to complete a digital audit, please contact us.