

Attachment A-7

Instructions for Running the Business Plan Report in ASE

Step #1

From your department scorecard, select “Business Plan” from the top ribbon menu.

The screenshot displays the ASE software interface. At the top, there is a ribbon menu with several tabs: 'Menu', 'Home', and a 'Reports' tab. The 'Reports' tab is active, and the 'Business Plan' option is highlighted with a red circle. Below the ribbon menu, the main content area shows a 'Scorecard - Sample Scorecard for Business Plan Report'. The scorecard has a 'Details' tab selected, and a sub-tab 'Measures' is also selected. The 'As Of' date is set to '15'. The scorecard table shows the following data:

	As Of	Actual	Business Plan Goal	FYTD Actual	FYTD Goal
Customer					
Sample Objective					
Sample Measure #1	Sep '18	523	500	6,234	6,000
Financial					
Internal					
Learning and Growth					

Step #2

After report runs, please review that everything displays correctly. If so, press the print icon shown below.

Initiatives inclusive of "Priority Initiatives"

Department Scorecard Objectives

Parent and Grandparent Objectives in Strategic Plan

Measures and Related Graphs showing Targets

Scorecard		Description					Owners	
Sample Scorecard for Business Plan Report							Maxwell, Carlos M. (OMB)	
Initiatives Linked to Scorecard	Est. Start	Est. End	Type	As Of	%	Status	Owners	
Sample Priority Initiative	10/1/2017	9/30/2018		9/19/2018	75%	In Progress	Maxwell, Carlos M. (OMB)	

Customer		Description					Owners	
Sample Objective							Miami-Dade County	
Grandparent Objectives		Description					Owners	
Sample Grandparent Objective							Miami-Dade County	
Parent Objectives		Description					Owners	
Sample Parent Objective							Miami-Dade County	

Measures Linked to Objective		Period	Actual	Target	Variance	Owners
Sample Measure #1		Sep '18	523	500	23	Miami-Dade County

Sample Measure #1

Actual Target Trend

Step #3

When print preview opens, adjust the page size if necessary. Gray page break lines (not shown) can be moved upwards to correct irregular page breaks. After the document is ready, press the PDF icon and save and email the document to OMB along with your scorecard and Business Plan Narrative.

Print Preview - Business Plan Report - Sample Scorecard for Business Plan Report

Print Resolution: Medium

Scorecard	Description	Owners					
Sample Scorecard for Business Plan Report		Maxwell, Carlos M. (OMB)					
Initiatives Linked to Scorecard	Est. Start	Est. End	Type	As Of	%	Status	Owners
Sample Priority Initiative	10/1/2017	9/30/2018		9/19/2018	75%	In Progress	Maxwell, Carlos M. (OMB)

Customer

Objective	Description	Owners
Sample Objective		Miami-Dade County
Grandparent Objectives	Description	Owners
Sample Grandparent Objective		Miami-Dade County
Parent Objectives	Description	Owners
Sample Parent Objective		Miami-Dade County

Measures Linked to Objective	Period	Actual	Target	Variance	Owners
Sample Measure #1	Sep '18	523	500	23	Miami-Dade County

Sample Measure #1

Actual Target Trend

Oct '15 Oct '16 Oct '17 Oct '18 Oct '19 Sep '20

To make sure your graph displays targets through the end of FY20, please review Steps A and B below

Financial

Measure Graph: Step A

Hover over the small arrow at the top right of the graph from the measure detail page, then select the edit option. (You can access the measure detail page from your scorecard by clicking on the measure name which is "Sample Measure #1" in this example)

The screenshot displays a performance dashboard for 'Sample Measure #1'. The interface is divided into several sections:

- Performance - Sep '18:** A table showing the current performance status.
- Charts, Gauges & Pictures:** A bar chart showing historical performance from Oct '15 to Sep '20. The chart includes a legend for Actual (brown bars), Target (green line), and Trend (blue line). The 'Edit' button in the chart's toolbar is circled in red.
- Linked Objects:** A tree view showing the hierarchy of measures, including Child Measures, Parent Measures, Sibling Measures, ActiveViews, Initiatives, and Objectives.
- Data:** A table showing historical performance data for the measure.

Comparator Name	Actual	Target	Variance
Goal - Default	523	500	23

Period	Comparator Name	Sum. Lvl.	Actual	Target
Sep '18	Goal - Default	Base	523	500
Aug '18	Goal - Default	Base	549	500
Jul '18	Goal - Default	Base	552	500
Jun '18	Goal - Default	Base	501	500
VR May '18	Goal - Default	Base	495	500
Apr '18	Goal - Default	Base	520	500
Mar '18	Goal - Default	Base	536	500
VR Feb '18	Goal - Default	Base	489	500

Measure Graph: Step B

Select the Display tab at the top-left hand corner of the Chart Builder. Change the Chart Period option to “Date Range”, and then make sure the end date goes through the end of fiscal year 2020. The start date used is at your discretion.

The screenshot displays the Chart Builder application window. The 'Display' tab is selected and circled in red. The main area shows a bar chart titled 'Sample Measure #1' with a Y-axis from 0 to 600 and an X-axis from Oct '15 to Sep '20. The chart includes a legend for 'Actual' (brown bars), 'Target' (green line), and 'Trend' (blue line). Below the chart, the configuration panel shows the following settings:

- *Name: Sample Measure #1
- Description: [Empty text box]
- Chart Period: Date Range (circled in red)
- Use on Reports:
- Chart Type: Trend
- Horizontal:
- Stacking: None
- Chart Range:
 - *Start Date: 10/1/2015
 - *End Date: 9/30/2020 (circled in red)

A red arrow points from the 'Chart Type' dropdown to the 'Use on Reports' checkbox. Another red arrow points from a text box to the 'End Date' field. The text box contains the following text:

You may need to scroll down to access the End Date Field.

At the bottom of the window, there are buttons for 'Delete', 'Apply', 'Save', and 'Cancel'. A legend at the bottom right indicates '* = Required'.