**Compliance Matrix Form**

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| **Core Business Processes (Skills, Learning Programme and ETQA)** | | **Bidders Response on System Compliance**  **(Yes/No)** | **Bidders Explanation** | **Reference Clause in the Proposal** |
| **Process** | **Business Requirement** |  |  |  |
| SLA with Department of Higher Education (DHET) | The PSETA sets an SLA with the DHET with specific targets for the year.  The SETA system(s) shall provide weekly and *ad-hoc* reporting on progress against each of the targets as set out in the DHET quarterly report / NSDS targets. |  |  |  |
| Business Plans | The PSETA draws up a business plan with measurable targets. These business plans contribute towards the SLA.  The business plan targets include, *inter alia*, WSP’s, Discretionary Grant (DG) projects and other special projects to address objectives set out in, among others, the Sector Skills Plan.  The SETA system(s) shall support the capturing and tracking of the SLA and business plan targets per region and any other applicable categorization required. |  |  |  |
| Sector Skills Plan (SSP) | A Sector Skills Plan is a skills development “report” or “roadmap” developed by a SETA in consultation with stakeholders in a specific economic sector to develop a highly skilled workforce, improve productivity and increase the competitiveness of the sector through skills development. A 5 year SSP is developed, and updated annually. The SETA system(s) shall provide for the extraction of all information required, e.g. information captured against the WSP/ATR, employer information, learner information, learning programmes, etc. |  |  |  |
| Employers | The SETA system(s) shall support:   * Employer registration and maintenance. * Maintain employer development areas, required training, etc. * The uploading of the employer file received on a monthly basis from SARS. The file contains all current and new employers. * Make provision for the registration of temporary or non-levy paying departments. * Provide for Web based online access for Employers to load and update own information. |  |  |  |
| Skills Development Facilitators (SDFs) | The SETA system(s) shall:   * Support the registration and maintenance of SDF details. * Provide for Web based online access for SDFs and to register and update own information online. * Provide for a CRM module to send communication electronically to SDFs and employers |  |  |  |
| Workplace Skills Plans (WSPs) / Annual Training Reports (ATRs) | The Annual Training Report (ATR) and the Workplace Skills Plan (WSP) shall be capable of both being captured directly on SETA system(s) by the SDF. If and where applicable, the system should allow for the pre-population of the previous year’s WSP. The WSP is reviewed, and then approved on the SMS system. This triggers the Mandatory Grant process in the case of levy-paying employer’s only. The SETA system(s) shall allow:   * Employers’ SDFs to create, capture and maintain WSP-ATRs directly on the system. * The Employer shall be able to generate a hard copy of the WSP-ATR that is signed and submitted to the PSETA to meet submission requirements. * Progress updates by the Employer shall be done on-line. The Employer shall have the ability to generate hard copy reports of the updated WSP. * The online evaluation and approval of the WSP-ATRs according to predefined criteria shall be supported by the SETA system(s). * The SDF should be able to submit information up to the deadline date of 30 April. The system will allow read-only access after the deadline date has passed. * The capturing of WSPs for employers who have been granted an extension to 31 May. * The WSP-ATR forms to be reviewed and updated according to the PSETA’s templates specified from time to time. * A CRM module to send communication electronically regarding the WSP-ATR to SDFs and employers. * For the raw data of the WSP-ATR to be drawn from the system at any time. * For reports on the WSP-ATR to be generated. * Monthly and quarterly reporting of WSP submissions and reporting these through the DHET SETMIS. |  |  |  |
| Mandatory Grants (MGs) | The SETA system(s) shall support a fully integrated Mandatory Grants process:   * This process originates with WSP-ATR that is approved by the Skills Planning and Research manager or equivalent. * The SETA system(s) shall calculate the amounts due to the respective employers and generate a schedule of MG disbursements per company. The payment shall be calculated based on a fixed percentage of the levy paid by the particular employer. The calculation will take all levies vs grants paid and any SARS reversals into consideration. * The SETA system(s) shall generate a listing which is checked by the Finance Manager, and then authorized by CFO/CEO. The SETA system(s) shall generate a payment voucher for each employer on the list. * MG payments shall be made each quarter, for the previous quarter. * Exceptions shall be removed from the list before payments are generated. * SARS will trigger any adjustments to the levy paid by a company. This could result in an additional payment (if actual levy was higher), or recovered from future MG payments (if it was lower). Only in exceptional cases will it be necessary for monies to be retrieved from a company. * Employers shall have online access, through a Web interface, to query the SETA system(s) regarding the payment status of Mandatory Grants. |  |  |  |
| Discretionary Grants (DGs) | The SETA system(s) shall support a fully integrated Discretionary Grants process. The Discretionary Grants process is based on a contract with an Employer. This is managed as a project where specific objectives are agreed.  For a DG project the following shall be managed in the SETA system(s):   * The learners who form part of the project (they may not be employees of the company) * The course / skills development objectives for the project * The deliverables to be achieved through the project, and the proof of deliverable * The payment tranches associated with each deliverable   The following contractual documents form part of the DG contract:   * A contract between the PSETA and the company * Contracts between the company and each of the learners (on a PSETA template)   It is a requirement that the SETA system(s) shall be capable of generating pro-forma contracts for the above, populated by information that is captured in the system. The signed contracts shall be scanned and linked to the DG Project.  The PSETA shall store all signed hard copies of all project documentation for audit purposes.  Upon approval of the DG Project the SETA system(s) shall support the following process:   * Generate a schedule of deliverables and a payment schedule. This is used to liaise with a company when a deliverable is due * Departments shall have online access, through a Web interface, to update the progress status of DG Projects (i.t.o. units completed per learner, etc.) * The project will be monitored on an ongoing basis by means of regular progress reports, the tracking of milestones and their deliverables, and the tracking of spent and committed amounts vs. budgeted amounts. * When deliverables are due, the company is required to provide proof of the progress (as per the contracted requirement). Proof may take the form of training to be uploaded or a project deliverable. Hard copies are to be scanned / stored, and scanned electronic copies are shall be attached to the DG Project. * When there are changes to the contract, such as learners who dropped off the course, the contract needs to be amended and the contract variation order signed by both parties. The result of these changes shall be recorded in the SETA system(s), and approved by an authorized PSETA employee. * The SETA system(s) shall enable an authorized PSETA employee to approve a DG Project deliverable. This will set of the payment process in motion. The Finance Dept. waits for invoices that are generated by the responsible region. Invoices are supported by a PO and supporting documentation. It has to be authorized according to the defined delegation levels. The payment status of all deliverables will be reflected in the SETA system(s). * Finance produces a monthly management report indicating the status of payments to the employer. * Projects may span more than one financial year. The system(s) must make provision for this, in particular the financial system must cater for the remaining part of the project to be executed in the new financial year.   A department shall have online access, through a Web interface, to query the SETA system(s) regarding:   * The payment status of DG Contracts. * The PSETA learner database to identify learners whom they could ask to participate in a DG Project. |  |  |  |
| Discretionary Grant Projects | In addition to the Discretionary Grant Projects (described above) the PSETA also undertakes Strategic Projects, Sector Initiatives and other projects. The process is generally as follows:   * Review Sector Skills Plan (SSP) for gaps that could be addressed through a project. Advertise project in the media to invite companies to participate in the project * SCM contracts the company (or companies) and generates a PO. This includes defining payment tranches linked to specific deliverables.   The process is very similar to the DG process described above. The SETA system(s) shall support the DG Projects process with the Projects functionality described in Section 4.1.4, including:   * Registration of project * Capturing of project scope, deliverables, budget, etc. * Definition of deliverables with tasks * Definition of approved project budgets * Collection actual costs against project * Maintenance of forecasts * Management of budgets per milestone / deliverable * Scheduling and tracking of projects * Provision of project accounting (including integration with procurement, accounts payable and financial and management accounting) * Linking and tracking of learner programs to the project. |  |  |  |
| Learnership / Apprenticeship / Skills programmes | Registration and maintenance of Learnerships, Apprenticeships and Skills Programmes.   * ETQA & SPR SETMIS Quarterly Reporting * The SETA system(s) must be able to load Learner information according to the requirements of the NLRD and SETMIS. The SETA system(s) must allow the monitoring of Learnerships as per all relevant legislative and audit requirements, and Learnership contracts must be able to be attached / referenced. The SETA system(s) must facilitate the required Learnership payments to be made. The system must be able to have the following status when registering learners; * Application for provider capturing * Registered * Upload attendance registers * Terminated * Completed linked to ETQA for statement of results * OFO Codes related to the learning programme * The system must be able to generate registration number, once all information related to registration is captured and supporting documents are uploaded. * The system must be able to create a learner folder that contains the learning programme agreement and required supporting documents. * The system must be able to provide parties to the learning programmes agreement with access to view and to print. * Artisan Development: * Workplace Approval: Capture application form on the system, the Trades and Artisan specialist conduct the audit, compile the report and upload the checklist, the report and all supporting documents on the system. The system generate the workplace approval letter with an approval number. Send the workplace approval letter to the applicant. * Trade Test application: capture applications on the system and upload supporting documents, Quality check by the Trades and Artisan Specialist for approval, the system generate the serial number, the administrator complete the part that requires the serial number on the application form and send back the application to the trade test centre. * Trade Test Certification: capture application on the system, upload the trade test report received from the trade test centre and all supporting documents required, the Trades and Artisan Specialist quality check the documents for approval. After approval the administrator makes a file with all required documents and submit to NAMB. Once the certificate is available the administrator will collect and load a copy of the certificate on the system and proof of issue of the certificate. |  |  |  |
| Upload / report to DHET | The SETA system(s) shall enable the PSETA to:   * Produce reports as required by the DHET in the required electronic format. * This includes, among others, the Schedule 2B report to be delivered to the DHET on a quarterly basis. * The format and integrity of the information shall comply with DHET standards. The SETA system(s) shall also comply with the emerging ESSA standard. * Reporting to the DHET shall include the following new requirements: OFO (Organizing Framework for Occupations) codes and learner municipality (postal codes). |  |  |  |
| Learner Database | The SETA system(s) shall facilitate:   * Registration / maintenance of learners’ information according to the requirements of the NLRD. * Training Providers to upload any assessment and moderation data for the learners. * Monitoring of learners six months after completion * Auditing / external moderation |  |  |  |
| Education and Training (ET) Providers | The PSETA deals with around 400 ET Providers.  The ETQA department of the PSETA is responsible for the accreditation of providers.   * The SETA system(s) shall facilitate the management, accreditation process and status of providers through the entire process, including: Facilitate the management of the entire process of accreditation, from application to evaluation to accreditation. * Capture the entire monitoring and auditing process for providers through data entry and the scanning of documents. * Allow the ETQA department to load the scope of the provider and audit information. * Capture the information according to the requirements of the NLRD. * Generate the Provider accreditation letters and certificates. * Manage the accreditation time (automatic lapsing according to dates). |  |  |  |
| Programme Approval for ET Providers | The SETA system(s) shall enable the management of the entire process, from the submission of a programme to the approval and extension of the scope of a provider according to a programme’s scope.  *This process shall be similar to the accreditation process except that the programme approval and extension of scope providers do not submit QMS* |  |  |  |
| Maintenance of Learners and assessment/achievement records | ET Providers are required to maintain Learner information according to the requirements of the NLRD.  The SETA system(s) shall provide the following mechanisms and capabilities:   * Direct online access to the SETA system(s) shall be provided via a Web interface to:   + Add / maintain learner records   + Add / maintain unit standards to a learner   o Add / maintain learning programmes to a learner  o Maintain assessments per learner   * The SETA system(s) will test to ensure the minimum credits and correct combination has been achieved before the certificate can be created by the ETQA division. |  |  |  |
| Assessors | SETA system(s) shall enable the registration and maintenance of assessor details. The system shall provide for the following, *inter alia:*   * Support the process of Assessor registration, from application to approval and capturing of information including contact details, qualifications, unit standards and qualifications qualified for assessment and providers that are associated to the assessor. * It shall include the maintenance around assessors including assessor types, assessor status, assessor status reason, qualifications and unit standards for assessment.   *(It is to be noted that the ETD practitioners will still submit hard copy application forms to the PSETA ETQA. These will then be evaluated manually and those that qualify will be captured on the system, scope awarded online and registration letters generated and printed from the system).* |  |  |  |
| Moderators | SETA system(s) shall enable the registration and maintenance of moderator details. The system shall provide for the following, *inter alia:*   * Support the process of Moderator registration, from application to approval and capturing of information including contact details, qualifications, unit standards and qualifications qualified for assessment and providers that are associated to the moderator. * It shall include the maintenance around moderators including moderator types, moderator status, moderator status reason, qualifications and unit standards for assessment. * The system shall only allow those registered as assessors to apply and be registered as moderators after assessing the scope for at least two years. * The moderator will be registered only for the scope that they have as an assessor.   (it is to be noted that the ETD practitioners will still submit hard copy application forms to the PSETA ETQA. These will then be evaluated manually and those that qualify will be captured on the system, scope awarded online and registration letters generated and printed from the system |  |  |  |
| Unit Standards | The SETA system(s) shall provide the following:   * A database of Unit Standards shall be maintained. * It shall include the credit value, start and end dates and teach out period. * The system shall contain measures to ensure that Unit Standard descriptions and details are aligned with SAQA standards at all times. * Unit standards that relate to other regulatory bodies shall contain a cross reference to the relevant module as defined by that body. |  |  |  |
| Skills Programme | * The PSETA ETQA department must be able to create, update and manage skills programmes. * This will include combining unit standards to form a skills programme * Calculate required credits and notional hours |  |  |  |
| Qualifications | The SETA system(s) shall provide the following:   * A database of Qualifications as registered by QCTO shall be maintained. * It shall include the unit standards, whether core, fundamental or elective, the total credit value, start and end dates and teach out period. * The system shall contain measures to ensure that Qualifications descriptions and details are aligned with SAQA standards at all times. |  |  |  |
| Certification of Learners | The PSETA’s ETQA department issues a certificate upon the successful completion of a *learning programme* by a learner. The PSETA issues around 3000 certificates per year.  The SETA system(s) shall manage the certification of Learners, which is a strict process with certain rules and approval levels that shall be built into the system.  The SETA system(s) shall facilitate the process as follows:   * The system will only allow the ETQA division to create a certificate once the rules of combination were achieved. The Training Provider shall be able to upload the information, including the statement of results, against each learner’s name. * The ETQA approval status will only be available to the ETQA division for the creation of certificates. The process of issuing the certificate is subject to strict security measures, and it is required that this is controlled by system access measures and that a full audit trail be maintained by the system. * The system shall automatically use the next number and make provision for the hologram number uploading. |  |  |  |
| NLRD upload / reporting to SAQA | The SETA system(s) shall enable the PSETA to produce quarterly reports to SAQA in the required electronic format. The integrity of the information shall comply with SAQA standards to ensure a successful upload of all records to SAQA. The format of the upload to SAQA is defined by SAQA. The fields on the system shall be updated continuously to reflect those on the NLRD.  *The service provider will have to attend the SAQA/NLRD and QCTO sessions to understand the reporting requirements of the system.* |  |  |  |
| **Finance Processes** | | **Bidders Response on System Compliance**  **(Yes/No)** | **Bidders Explanation** | **Reference Clause in the Proposal** |
| **Process** | **Business Requirement** |  |  |  |
| Standard financial accounting | The SETA system(s) shall provide the following capabilities, including:   * Accounts receivable * Accounts payable * General ledger * Bank * Lease accounting * Cash management * Asset accounting * Period end processing (month, quarter and year end) |  |  |  |
| Management accounting | * Cost centre accounting and reporting * Cost centre budgeting and budget control * Budget preparation and control * Forecast preparation and control * Management accounting reports * Business intelligence |  |  |  |
| Project accounting | * Project / WBS budgeting * Budget control per WBS * Forecasting |  |  |  |
| Financial reporting | * Compliance and Legal reporting * DHET Reporting of receipt of levies (monthly) * Treasury Reporting (monthly and quarterly reports have different formats) * Production of Audit Trails and Reporting for internal and external auditors * Fully integrated accounting reporting, including salaries. |  |  |  |
| Asset Management | * Asset register and details. SCM is responsible for the logistical aspects (e.g. tagging, tracking, etc.) while accounting (depreciation, etc.) is handled by Finance. All items above R5k are handled as assets. * Fixed and intangible asset accounting |  |  |  |
| Payments | * All payments shall be managed by this functionality. * The SETA system(s) shall manage, process and control all payments and generate the payment advice. Payment of vendors is based on an approved invoice, and a PO that is generated by SCM. All payments are done via EFT (ABSA). * It shall integrate with Salaries payments and do allocation to cost centres from the Salaries module. |  |  |  |
| Disbursements of Grants | * Discretionary Grants disbursements shall occur once a project deliverable is approved. * Mandatory Grants disbursements shall occur according to the schedule of MG disbursements that is generated by the SETA system(s). * The SETA system(s) shall process the EFT payments for grants, and generate the payment advice. * The SETA system(s) shall update the SETA system(s) to reflect the payment status of grants. * The solution shall include seamless integration between the various modules of the SETA system(s) to facilitate the processing of grant payments. It will require approval on the system of payments by the relevant PSETA employees. |  |  |  |
| **SCM/Procurement Processes** | | **Bidders Response on System Compliance**  **(Yes/No)** | **Bidders Explanation** | **Reference Clause in the Proposal** |
| Demand Management Plan | Set up a demand management plan and verify acquisition of goods against the plan. |  |  |  |
| Delegations and thresholds | The SCM process shall take place as per PSETA policy, National Treasury prescriptions, and as described in the applicable legislation such as the PFMA.  To determine the availability of products and services in the market place, the TEC may publish a Request for Information (RFI).  All procurement of goods and services must follow one of the following approved (RFx) purchasing mechanisms:   * Request for Quotation (RFQ) ; or * Request for Proposal (RFP) / Request for Tender (RFT).   The mechanisms, processes and approvals shall be enabled by the system and its workflow. The delegations and thresholds employed are:   * Up to R1000 – Petty cash system * Up to R2000 – One written quote system with a detail description / specification, if necessary * Above R2000 up to R 500,000 – Three written quote system with a detail description / specification. * More than R 500,000 – Competitive Tender with a Business Case approval via a Board sub-committee. Tenders may be open or, if the market is highly specialized, Single, Selected or Closed. |  |  |  |
| Supplier selection | System to be able to link to the Central Supplier Database |  |  |  |
| Supplier | Registration and maintenance of suppliers, including all relevant details (such as bank accounts, supplier category, expiry date on Tax certificate, BEE status, etc.). |  |  |  |
| Evaluation of suppliers | The system shall provide, through reporting, information to enable the PSETA to measure the performance of suppliers. |  |  |  |
| Tender | Tender process comprises the following:   * New Tender registration * CEO approval * Establishment and capturing of TEC Members * Approval of the Project Charter * Generation and printing of documents for the tender * Capturing and approval of Meeting Minutes * Viewing of Bid Documents * Capturing of Briefing results * Creation and viewing of advertisement for tender * Tender closure * Bidder registration * Evaluation of Critical Criteria for a bid Administrative compliance evaluation * Rejection of bids due to non-compliance * Technical evaluation for bid * Validation of technical evaluation * Approval of tender * Award of tender |  |  |  |
| Contracts | Create, maintain and authorize Contracts.   * Contract Registration (type (e.g. Tender SLA, Lease, etc.), business unit, etc.) * Contracting party information * Contract details * Payment schedule specification, including deliverables, quality, tranche due dates and contract amount * Invoice capture and approval, including a calculation of the pending and outstanding total against the contract amount * Attached contract documents * Contract Monitoring, including aspects such as monitoring visits * Update contract information such as start, end and contract signed dates * Addendum registration and approval. Addendums comprise:   + Payment schedule updates, or   + Tax clearance Certificates. * Provision of contract summary information, including all tranches and invoices to date. |  |  |  |
| Procurement | The Tender process comprises the following:   * RFP capturing of new item, including   + priority   + type of good/services/ consultants   + capex/opex/HR or IT * Establishment of Scope of Work (SOW)/Specification /Special requirements * HDI, Functionality and Pricing processing * Business unit manager approval * Procurement Capturing, including the supplier category * Establishment of supplier values, including the functional criterion and HDI * Comparative schedule establishment and approval * Supplier selection * Manager approval according to thresholds * Purchase Order processing, approval and notification * GRV capturing and notifications * Invoice capturing and approval * Request for payment * Processing of payments * Supplier evaluation / rating * Procurement Evaluation RFP closure and archiving |  |  |  |
| Selection of suppliers | The PSETA has a policy of selecting suppliers on the basis of rotation, selection or preferred supplier.  The system shall support all of these processes. |  |  |  |
| Travel management | Travel management functionality is required to manage travel, as per policy |  |  |  |
| Petty Cash management | Petty Cash management functionality is required to manage Petty Cash, as per policy |  |  |  |
| **Projects Management Processes** | | **Bidders Response on System Compliance**  **(Yes/No)** | **Bidders Explanation** | **Reference Clause in the Proposal** |
| Project Management | Being a project driven organization, the PSETA undertakes a variety of Projects. The SETA system(s) shall support projects with at least the following functionality:   * Registration of projects in such a way that it has a unique project registration that avoids duplicates and confusion of projects or their names. * Definition of Work Packages:   + Primary projects   + Sub-projects * Definition of deliverables with tasks * Definition of approved project budgets * Collection actual costs against project * Maintenance of forecasts * Management of budgets per WBS / Deliverable * Scheduling and tracking of projects * Provision of project accounting (including integration with procurement, accounts payable and financial and management accounting) * Linking and tracking of learner programs to the project. |  |  |  |
| Change Management | The systems must allow formal baseline establishment and change management, e.g.:   * Allow the establishment of various baselines for all aspects of the project such as the scope (e.g. number of learners), cost, schedule and deliverables, for purposes of being able to draw a comparison between the planned and actuals. * Provide the ability to incorporate changes to any and all project parameters, under configuration management, and to track changes to ensure that schedule, cost and contracts are aligned, and that audit requirements are met. |  |  |  |
| Risk Management | Track Risk Logs and Mitigation plans, with the ability to prioritize risks. |  |  |  |
| Incident Management | Track Issue logs and resolution, thereby providing the ability to identify problem areas and their resolution and  impact on the project |  |  |  |
| Documentation Management | * The Scanning and archiving of documentation relating to a project during its life cycle (e.g. supporting documentation linked to a DG project claim, etc.) * The Management and distribution of internal electronic documentation. The documentation can pertain to:   + A description of the relevant project lifecycle(s) and the policies, procedures, templates, standards, etc. pertaining to each phase of the project(s), and   + Project specific documentation, such as its Charter, Board approvals, Change Requests, etc. * All documentation must be version controlled, to track and control documentation and allow the latest documentation to be identified and utilized. |  |  |  |
| Reporting | * Generate PSETA standard reports (in PDF format), e.g.:   + Board status report   + Detailed monthly report   + Executive dashboard, etc. * Provide various project schedule reporting views. e.g. Gantt chart, network diagrams, etc. * Provide project health indicators on, *inter alia*: Cost/Budget, Schedule, Learners, etc., ranging from RAG (Red, Amber, Green) indicators to industry standard indicators such as CPI, SPI, % Complete, etc. The reports must be able to be viewed graphically or numerically in appropriate industry standard views. * The ability to filter reports to obtain reporting for various intervals. * The ability to communicate reports by sending email and notices relating to projects. |  |  |  |
| Integration | The project functionality must Integrate with the Financial and Contract Management system, and must incorporate, *inter alia,* contracts, budget and project plans between the systems to ensure alignment between financials, schedule and contracts |  |  |  |
| **Human Resource Processes** | | **Bidders Response on System Compliance**  **(Yes/No)** | **Bidders Explanation** | **Reference Clause in the Proposal** |
| Payroll | The PSETA currently makes use of VIP to manage the payroll. Respondents to the RFP are requested to provide a proposal to either:   * Retain VIP and provide hosting and application support, or * Provide an alternative payroll solution   The integration between the payroll solution and the SETA system(s) may be via manual file transfer.  Tax payments are handled via SARS e-filing. The payroll is processed via ABSA Bank |  |  |  |
| Leave administration | The solution shall support the leave administration process. |  |  |  |
| Personnel administration | The solution shall cater for:   * Employee details * Employee training. * Employee leave. * Employee demographics reporting. |  |  |  |
| Learning Management | The solution shall cater for:   * Employee training planning. * Employee training scheduling. * Employee training results |  |  |  |
| Performance Management | The solution shall allow individual performance assessment online. |  |  |  |
| Employee Self Service (ESS) | The ESS solution shall have a web browser based access and shall and shall be accessible to all PSETA personnel, with password based access, to, with the necessary security procedures in place:   * View their details. * Update relevant details regarding themselves, their spouses and dependents. * Submit leave for approval. * Submit grievances   The solution shall be workflow enabled and shall route the request appropriately as per the delegation of authority. |  |  |  |
| **Business Intelligence Requirements** | | **Bidders Response on System Compliance**  **(Yes/No)** | **Bidders Explanation** | **Reference Clause in the Proposal** |
| Reporting and analysis | A Business Intelligence tool shall be provided that will provide web-enabled management reporting to designated users in a variety of formats. These formats shall include Grids, Graphics (Bar charts, Line charts, Pie charts, etc), decomposition trees and perspective views. The BI tool shall ensure that all information is consolidated into one source database, providing the ability to compare trends between planned and actual values across a number of years. The BI tool shall also allow for the measurement of Key Performance Areas (KPIs) per division and across the whole of the PSETA, e.g. according to the NSDS targets and the organization and its division’s respective balanced score cards. |  |  |  |
| Integration | The BI tool shall enable users to easily access data from all functions and across all sub-systems of the SETA system(s) in a variety of formats. The process shall be seamless across the systems from the users’ point of view. |  |  |  |
| Standard Reports | Standard reports shall be built in the BI tool to provide the reports that cannot readily be obtained from the SETA system(s) standard reporting mechanisms. These include reports that must be provided to the DHET and other stakeholders. Examples of such reports are, *inter alia*:   * Weekly and ad-hoc reporting on progress against each of the targets as set out in the DHET quarterly report on the achievement of NSDS targets * General statistics, e.g. the number of levy paying companies (small, medium and large) per region, levies received per region, grants paid per region, people trained per region, number of small companies supported, trends of mandatory levy income vs. mandatory grants. * Report of all projects to the Board Committee (that is currently cut and pasted out of various systems and documents). * User friendly monthly and quarterly management financial reporting. |  |  |  |
| Ad-hoc Reports | Ad-hoc reports shall be able to be built with the BI tool, preferably by a user without the service provider’s assistance, to provide the reports that cannot readily be obtained from the SETA system(s) or BI tool’s standard reporting mechanisms. |  |  |  |