
PeopleSoft EPM 9.1 Portal Pack PeopleBook

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PeopleSoft Enterprise Performance Management Portal Pack 9.1 Preface

Welcome to the PeopleSoft Enterprise Performance Management Portal Pack 9.1 PeopleBook. This PeopleBook describes the PeopleSoft Enterprise Performance Management Portal Pack application pages.

This preface discusses:

- PeopleSoft Products.
- Related PeopleBooks.
- Common elements used in PeopleSoft EPM Portal Pack.
- Deferred processing in PeopleSoft Enterprise Performance Management Portal Pack.

PeopleSoft Products

This PeopleBook refers to these PeopleSoft products from Oracle:

- Oracle's PeopleSoft Activity Based Management.
- Oracle's PeopleSoft Global Consolidations.
- Oracle's PeopleSoft Scorecard.
- Oracle's PeopleSoft Workforce Analytics.
- Oracle's PeopleSoft Project Portfolio Management.
- Oracle's PeopleSoft Supplier Rating System.

Related PeopleBooks

Additional, essential information describing the setup and design of your system appears in these companion volumes of documentation:

- *Enterprise Performance Management Fundamentals 9.1 PeopleBook.*

Provides information needed to complete the core setup for all PeopleSoft EPM applications. This PeopleBook also describes the system architecture, the mapping of data into the Operational Warehouse - Enriched (OWE), and EPM Foundation tools and processes.

- *PeopleSoft Applications Portal 9.1 PeopleBook*
- *PeopleSoft Portal Solutions 9.1 Installation Guide*

Provides installation information for PeopleSoft EPM Portal solutions.

- *PeopleSoft Portal Products 9.1 Installation Guide*

Provides installation information on EPM portal solutions.

Common Elements Used in the PeopleSoft EPM Portal Pack

This section lists common elements used in the PeopleSoft EPM Portal Pack.

SetID	Provides the ID code for a tableset. A tableset is a group of tables (records) necessary to define your company's structure and processing options.
Effective Date	Establishes the date the row in the table becomes effective. It determines when you can view and change the information. Pages and batch processes that use the information use the current row.
Status	Indicates whether a row in a table is active or inactive. You cannot select inactive rows on pages or use them for running batch processes.
Description	Allows free-flow text up to 30 characters that describes what you are defining.
Run Control ID	Identifies specific run control settings for a process or report.
Report ID	Identifies the report.
Program Name	Provides the PeopleSoft Enterprise Performance Management program name for which you are running the report or process.
When	Specifies the frequency with which you want to run a process. You can select <i>Once</i> , <i>Always</i> , or <i>Don't</i> .
Last Run On	Indicates the date that the report or process was last run.
As Of Date	Indicates the last date for which the report or process includes data.
Scenario ID	Provides an identifier for a specific scenario.
Model ID	Provides an identifier for a model. A model uniquely identifies the types of data that you want to include in a scenario. For example, you might want to review revenue by region—a very high-level scope. Or, if you use PeopleSoft Analytic Forecasting, you might want to review only those activities that relate to a certain product line for certain types of resources—a very narrow scope.
Fiscal Year	Specifies the fiscal year for your scenario or process run.
Period	Specifies the accounting period for the object being defined or process being run.

Job ID

Specifies an instance of an engine.

Deferred Processing in PeopleSoft Enterprise Performance Management Portal Pack

Several pages in PeopleSoft Enterprise Performance Management Portal Pack operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value that you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with PeopleSoft EPM Portal Pack

This chapter provides an overview of PeopleSoft EPM Portal Pack and discusses PeopleSoft EPM Portal Pack implementation.

PeopleSoft EPM Portal Pack Overview

PeopleSoft EPM Portal Pack provides a collection of pagelets that can be individually selected to appear on a corporate intranet or extranet homepage. The individual pagelets provide information that is gathered from PeopleSoft Enterprise Performance Management (PeopleSoft EPM).

PeopleSoft EPM Portal Pack Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in *About These PeopleBooks*, with information about where to find the most current version of each.

See Also

PeopleTools PeopleBook: Setup Manager

PeopleTools PeopleBook: PeopleSoft Component Interfaces

Chapter 2

Understanding PeopleSoft EPM Portal Pack

This chapter provides an overview of PeopleSoft EPM Portal Pack and lists the PeopleSoft EPM Portal Pack pagelets.

PeopleSoft EPM Portal Pack

PeopleSoft EPM Portal Pack includes portal pagelets that provide at-a-glance access to essential data from your system. The portal pack supplements other PeopleSoft EPM applications that provide the underlying data.

When you install the PeopleSoft EPM Portal Pack, the pagelets appropriate for your role become available, with the navigation menu along the left margin so that you can access PeopleSoft EPM applications from the PeopleSoft EPM portal. Click the Personalize Content link to add one or more pagelets and the Layout link to arrange them on your homepage. You can configure their portal homepage layout with three narrow columns or one narrow and one wide column. Standard PeopleSoft role-based security ensures that users can access only the pagelets appropriate to their roles.

To use the pagelets in the PeopleSoft EPM Portal Pack, you must first install the enabling PeopleSoft EPM application. The PeopleSoft EPM pagelets and the enabling application are listed in the PeopleSoft EPM Portal Pack Pagelets section of this chapter.

See Also

PeopleSoft Applications Portal PeopleBook

PeopleSoft EPM Portal Pack Pagelets

This section lists the pagelets that make up PeopleSoft EPM Portal Pack and identifies:

- The audience for the pagelet: employees or customers.

The audience also identifies the portal registry where the pagelet is registered.

- The role of the person who uses the pagelet.

These are functional roles, not delivered PeopleTools roles.

- The pagelet's enabling application.

The enabling application provides the information that appears in the pagelet.

Pagelet Name	Audience	Functional Role	Enabling Application
ABM Object Variance Rates AB_PE_OBJ_VAR	Employee	Management, Analyst	PeopleSoft Activity-Based Management
ABM Object Rates AB_PE_OBJ_RATE	Employee	Management, Analyst	PeopleSoft Activity-Based Management
ABM Driver Rate Variance AB_PE_DRV_RATE	Employee	Management, Analyst	PeopleSoft Activity-Based Management
WFA Compensation Scenario WA_PE_CP_SUMMARY	Employee	HR Management, HR Analyst	PeopleSoft Workforce Rewards
WFA Market Comp Scenario WA_PE_MC_SCNSUM	Employee	HR Management, HR Analyst	PeopleSoft Workforce Rewards
WFA Retention Scenario WA_PE_RM_SUMMARY	Employee	HR Management, HR Analyst	PeopleSoft Workforce Rewards
Supplier Rating By Item BC_PE_ANLY_SCM1	Employee	Buyer	PeopleSoft Supplier Rating System
Supplier Rating By Category BC_PE_ANLY_SCM2	Employee	Buyer	PeopleSoft Supplier Rating System
Supplier Rating By Supplier BC_PE_ANLY_SCM3	Employee	Buyer	PeopleSoft Supplier Rating System

Pagelet Name	Audience	Functional Role	Enabling Application
GC Variance GC_PE_VARIANCE	Employee	Accountant, Controller	PeopleSoft Global Consolidations
My Favorites BC_PE_MY_FAVORITES	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
My Favorites (extension pagelet) BC_PE_MYFAVRTS_MORE	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI List BC_PE_KPICHART	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI List (extension pagelet) BC_PE_KPILIST	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Perspective Assessment BC_PE_PRSPCTV_ASMT	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI Ranking BC_PE_KPI_RANK	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI Ranking 2 BC_PE_KPI_RANK_2	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI Ranking 3 BC_PE_KPI_RANK_3	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI Ranking 4 BC_PE_KPI_RANK_4	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI Comparison Ranking BC_PE_KPI_KPI_RANK	Employee, Customer, Supplier	Any	PeopleSoft Scorecard

Pagelet Name	Audience	Functional Role	Enabling Application
KPI Comparison Ranking 2 BC_PE_KPI_KPI_RNK2	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI Comparison Ranking 3 BC_PE_KPI_KPI_RNK3	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI Comparison Ranking 4 BC_PE_KPI_KPI_RNK4	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Single KPI Detail BC_PE_SINGLE_KPI	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Single KPI Detail 2 BC_PE_SINGLE_KPI_2	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Single KPI Detail 3 BC_PE_SINGLE_KPI_3	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Single KPI Detail 4 BC_PE_SINGLE_KPI_4	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Object Ranking BC_PE_KPI_RK_NOSE C	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Object Ranking 2 BC_PE_KPI_RK_NOSE 2	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Object Ranking 3 BC_PE_KPI_RK_NOSE 3	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Object Ranking 4 BC_PE_KPI_RK_NOSE 4	Employee, Customer, Supplier	Any	PeopleSoft Scorecard

Chapter 3

PeopleSoft Activity-Based Management Pagelets

This chapter provides an overview PeopleSoft Activity-Based Management pagelets and discusses how to:

- Set up PeopleSoft Activity-Based Management portal user preferences.
- View PeopleSoft Activity-Based Management data through pagelets.

Understanding PeopleSoft Activity-Based Management Pagelets

The PeopleSoft Activity-Based Management pagelets give users instant access to some of the results of the PeopleSoft Activity-Based Management variance analysis, such as object variance rates, object rates, and driver rate variance.

Setting Up PeopleSoft Activity-Based Management Portal User Preferences

This section discusses how to:

- View the Result Preferences pagelet.
- View the Home Preferences pagelet.

Pagelets Used to Set PeopleSoft Activity-Based Management Portal User Preferences

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Result Preferences	AB_USER_PREF_1	Activity Based Management, Setup, Preferences, Preferences, Result Preferences	Establish default settings for the data that appears in PeopleSoft Activity-Based Management pagelets.

Page Name	Definition Name	Navigation	Usage
Home Preferences	AB_HOME_PREF1	Activity Based Management, Setup, Preferences, Preferences, Home Preferences	Set the preferences that you want the system to use when you navigate to pages using the PeopleSoft Activity-Based Management homepage.

Viewing the Result Preferences Pagelet

Access the Result Preferences pagelet (Activity Based Management, Setup, Preferences, Preferences, Result Preferences).

The screenshot displays the 'Result Preferences' pagelet with two tabs: 'Result Preferences' (selected) and 'Home Preferences'. Below the tabs, there are two main sections: 'Current Scenario' and 'Target/Base Scenario'.

Current Scenario Section:

- *Business Unit: CORP1 Corporation 1
- Sort by: Absolute % variance
- *Scenario ID: ACTUAL01
- *Calculation Column: Actuals Amount
- Fiscal Year: 2010
- Period: 1
- ☐ Most Recent Run

Target/Base Scenario Section:

- *Scenario ID: ACTUAL01
- *Calculation Column: Calculated Amount
- Fiscal Year: 2009
- Period: 12
- ☐ Current Period - 1

Result Preferences pagelet

Use this page to establish settings to display data in PeopleSoft Activity-Based Management portal pagelets. In PeopleSoft Activity-Based Management portal pagelets, you can view the comparison of results between:

- Two different scenarios from the same or different periods.
- Two different time periods for the same scenario.
- The actual, budgeted, and calculated fields for the same scenario and time period.

Business Unit Select from the available options.

Current Scenario Enter the scenario ID, fiscal year, and accounting period. Enter the calculation column. Values are *Actuals*, *Budgeted*, and *Calculated*.

Target/Base Scenario	Enter the scenario ID, fiscal year, and accounting period. Enter the calculation column. Values are <i>Actuals</i> , <i>Budgeted</i> , and <i>Calculated</i> .
Most Recent Run	Select to display the most recent run for the current scenario.
Current Period - 1	Select to display the target or base scenario.
Sort Objects by	Select how you want to sort objects. Values are <i>Absolute % Variance</i> (absolute percentage variance), <i>Absolute Variances</i> , and <i>Alphabetically</i> .

Viewing the Home Preferences Pagelet

Access the Home Preferences pagelet (Activity Based Management, Setup, Preferences, Preferences, Home Preferences).

The screenshot shows the 'Home Preferences' pagelet with a tabbed interface. The 'Home Preferences' tab is selected. Below the tabs is a section titled 'Select User Preferences'. This section contains several input fields with labels and search icons:

- SetID:** A text box containing 'AMERI' with a search icon.
- Business Unit:** A text box containing '00001' with a search icon.
- Model ID:** A text box containing 'HR' with a search icon.
- Scenario ID:** A text box containing 'ACTUAL' with a search icon.
- Fiscal Year:** A text box containing '2009'.
- Period:** A text box containing '3'.

Below the 'Period' field is a checkbox labeled 'Current Period' which is checked.

Home Preference pagelet

SetID, Business Unit, Model ID, Scenario ID, Fiscal Year, and Period	Enter the preferences that you want the system to use when you navigate to pages through the PeopleSoft Activity-Based Management homepage.
Current Period	Select to have the system always default the current period into the search record.

Note. When you click a link on the PeopleSoft Activity-Based Management homepage and you have set your preferences, the system uses them to fill in the search record for the page that you are accessing. In many cases, your preferences enable the system to bypass the search record, thus making it easier for you to navigate to the pages accessed through the PeopleSoft Activity-Based Management homepage.

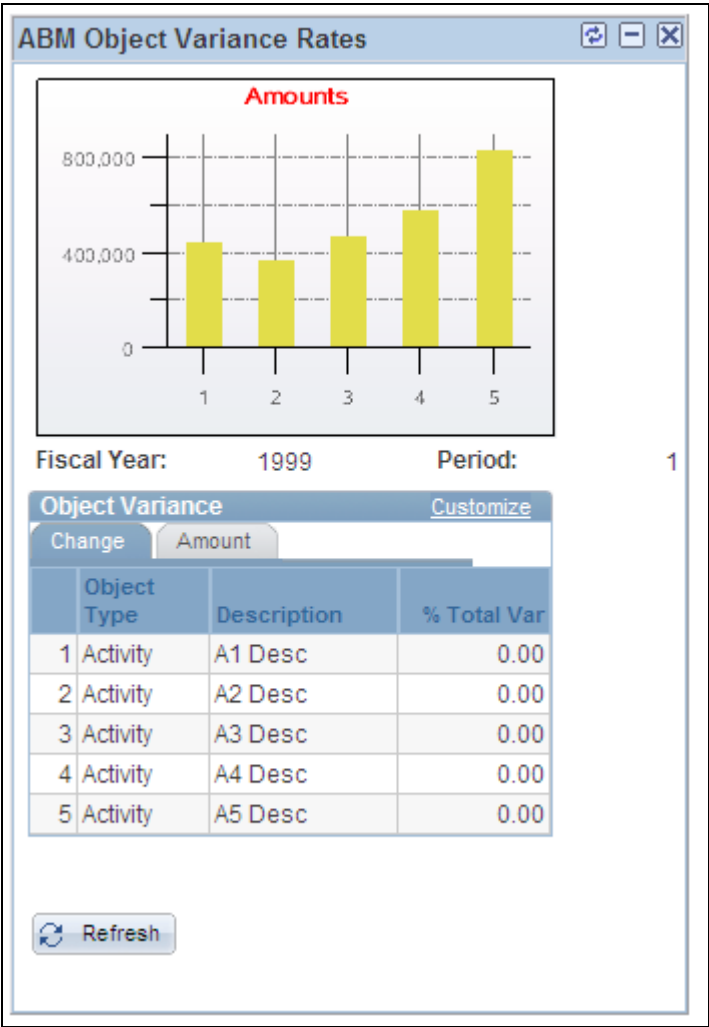
Viewing ABM Data Through Pagelets

This section discusses how to:

- View the ABM Object Variance Rates pagelet.
- View the ABM Object Rates pagelet.
- View the ABM Driver Rate Variance pagelet.

Viewing the ABM Object Variance Rates Pagelet

Displays object amount variances.



ABM Object Variance Rates pagelet

Change

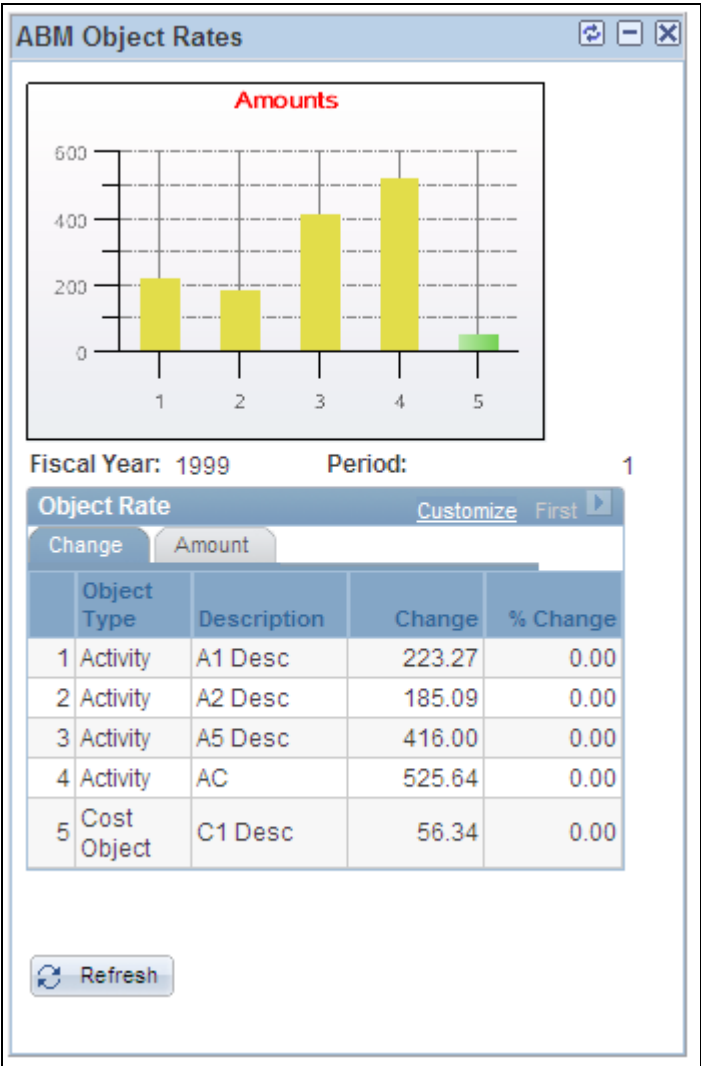
This tab displays the object type, description, and percentage total variance for the settings that you specified on the Result Preferences pagelet.

Amount

This tab displays the total variance, current amount, and target amount.

Viewing the ABM Object Rates Pagelet

Displays object variance rates.



ABM Object Rates pagelet

Change

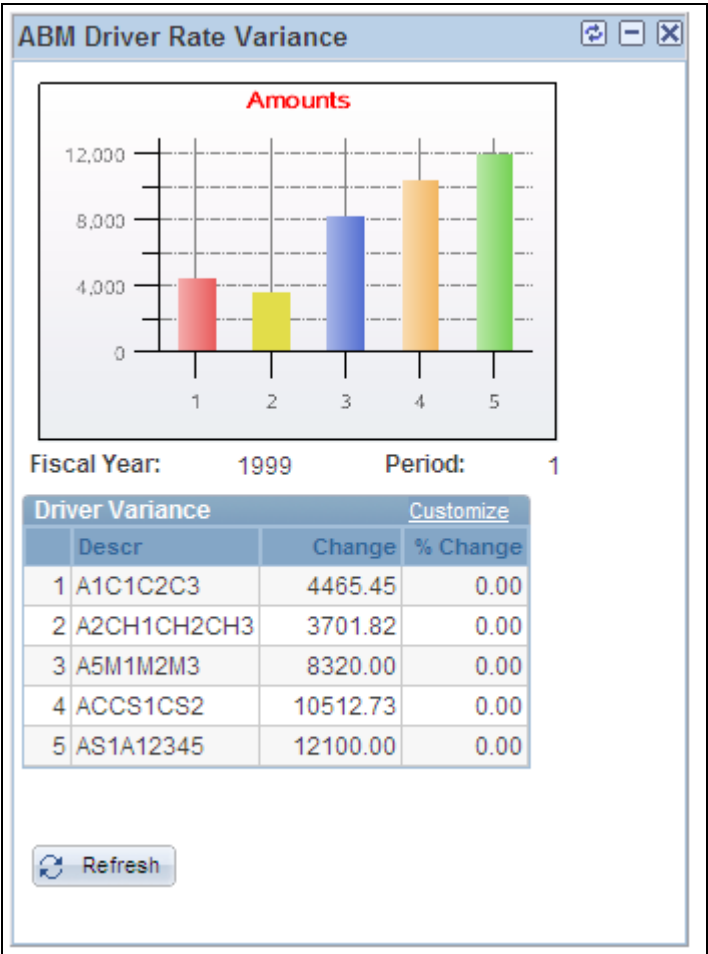
This tab displays the object type, description, change, and percentage change for the settings specified on the Result Preferences page.

Amount

This tab displays the current amount and target amount.

Viewing the ABM Driver Rate Variance Pagelet

Displays driver rate variances.



ABM Driver Rate Variance pagelet

This pagelet displays the description, change, and percentage change for the settings specified in the Result Preferences pagelet.

Chapter 4

PeopleSoft Workforce Analytics Pagelets

This chapter provides an overview of Workforce Analytics pagelets and discusses how to:

- Establish default settings.
- View Workforce Analytics data through pagelets.

Understanding Workforce Analytics Pagelets

Use the Workforce Analytics pagelets to view scenario results from the Manage Market Compensation, Manage Retention Planning, and Manage Compensation Planning modules of Workforce Rewards.

Establishing Default Settings

To establish default settings, use the WA_OPER_DEFAULT.GBL component.

Before you begin using Workforce Analytics pagelets, specify a business unit and scenario for the system to use when retrieving data that is to appear on the pagelets. Use the Operator Defaults - My Profile page to do this.

This section discusses how to set up operator defaults.

Page Used to Establish Default Settings

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Operator Defaults - My Profile	WA_OPER_DEFAULT	Workforce Analytics, Workforce Analytics Setup, Operator Defaults	Establish default settings for the data that appears in the pagelets.

Setting Up Operator Defaults

Access the Operator Defaults - My Profile page (Workforce Analytics, Workforce Analytics Setup, Operator Defaults).

Operator Defaults

User ID: VP1

User Defaults

Business Unit: CORP1

Compensation Planning:

Scenario ID: WFR3

Fiscal Year: 2001

Retention Planning:

Scenario ID: WFR1

Effective Date: 01/31/2000

Market Compensation:

Scenario ID: ACTUAL01

Effective Date: 01/01/1999

Operator Defaults - My Profile page

User ID	Displays the user ID.
Business Unit	Enter a business unit.
Compensation Planning	Enter a scenario ID and fiscal year.
Retention Planning	Enter a scenario ID and effective date.
Market Compensation	Enter a scenario ID and effective date.

Once you have completed this page, the system displays data for the specified business unit and scenarios whenever you access the Workforce Analytics pagelets.

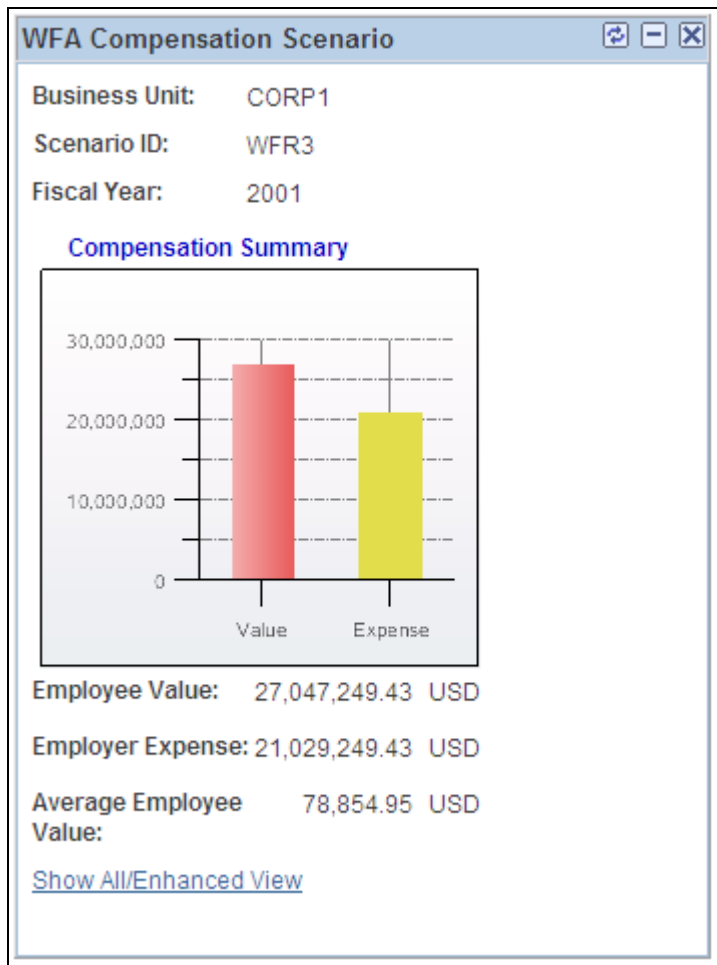
Viewing Workforce Analytics Data Through Pagelets

This section discusses how to:

- WFA Compensation Scenario pagelet.
- View the WFA Market Comp Scenario pagelet.
- View the WFA Retention Scenario pagelet.

Viewing the WFA Compensation Scenario Pagelet

Go to this pagelet to view high-level summary results for a given compensation planning scenario.



WFA Compensation Scenario pagelet

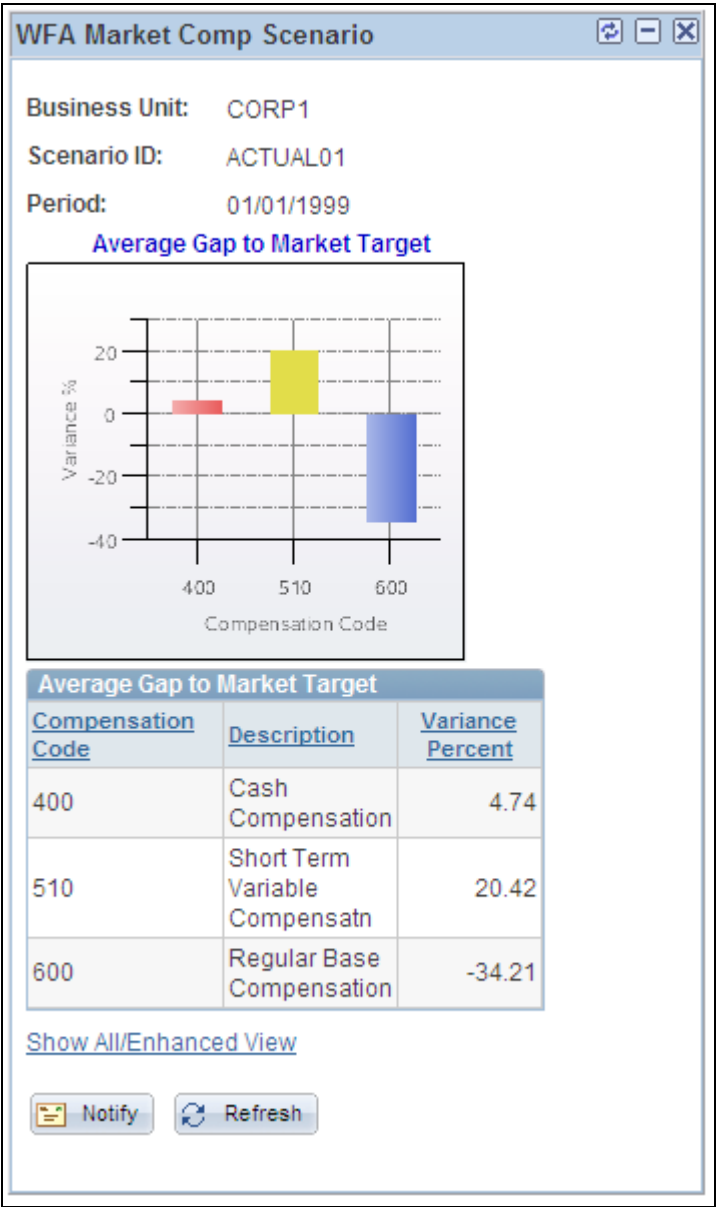
The pagelet displays the business unit, scenario ID, and fiscal year that you specified on the Operator Defaults - My Profile page.

The bar chart on this pagelet illustrates the total employee value compared to the total employer expense for the scenario.

The pagelet also displays, in monetary terms, the employee value, employer expense, and the average employee value. Click the [Show All/Enhanced View](#) link to access the Compensation Scenario inquire component, where you can review the scenario details.

Viewing the WFA Market Comp Scenario Pagelet

This pagelet displays high-level summary results for a given market compensation scenario.



WFA Market Comp Scenario pagelet

- Business Unit, Scenario ID, and Period**

Displays the values that you specified on the Operator Defaults - My Profile page.
- Variance % Code** (variance percentage code) and **Compensation**

At the center of the pagelet the system displays a bar chart. The chart shows, for each compensation code included in the scenario, the variance percentage between the average monetary amount for the compensation code and the monetary value for the market target rate.
- Compensation Code, Description, and Variance Percent**

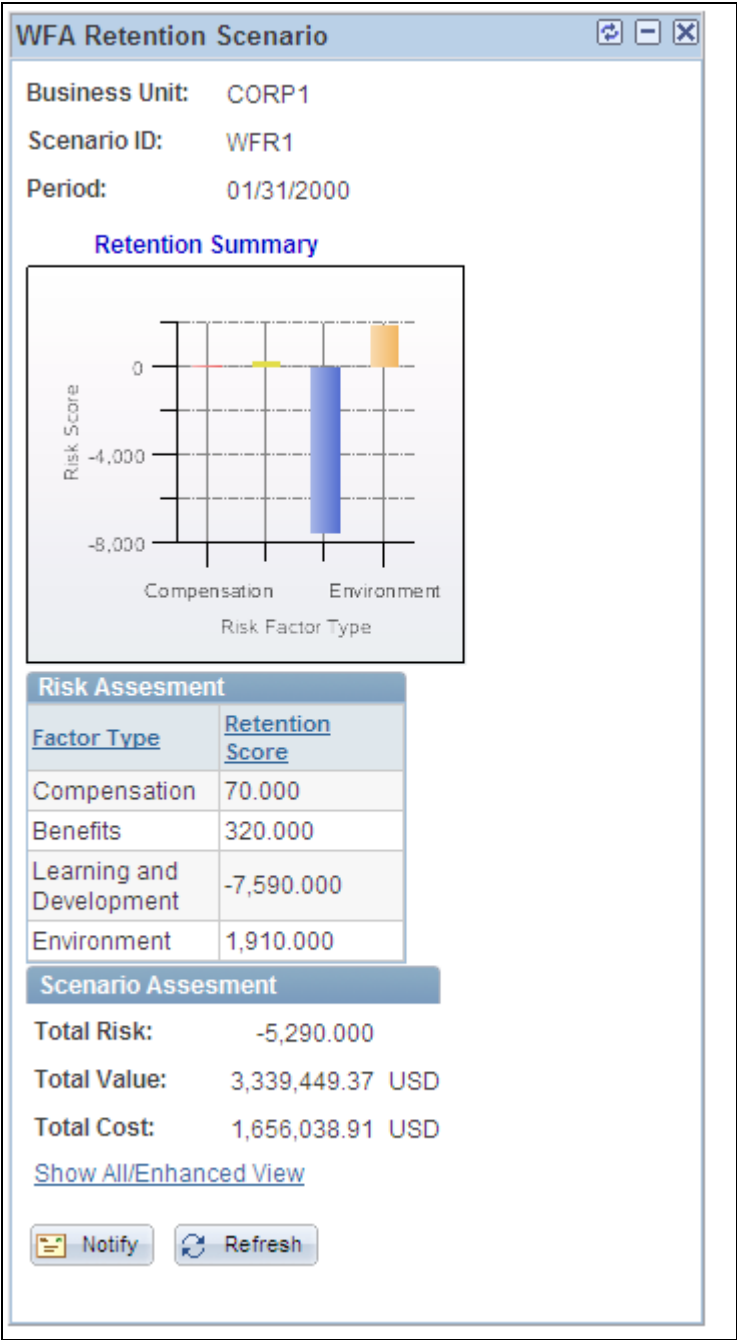
Displays the compensation code, description, and the variance percent.

Show All/Enhanced View

Click this link to access the Market Compensation Scenario inquire component, where you can review the scenario details.

WFA Retention Scenario Pagelet

This pagelet displays high-level summary results for a given retention planning scenario.



WFA Retention Scenario pagelet

Business Unit, Scenario ID, and Period	Displays the values that you specified on the Operator Defaults - My Profile page.
Risk Factor Type and Risk Score	Displays the risk factor type and the corresponding retention risk score in the bar chart.
Risk Assessment	Displays each retention factor type included in the scenario and the corresponding retention score for that factor type.
Scenario Assessment	Displays the total risk, total value, and total cost assessed for the scenario.
Show All/Enhanced View	Click this link to access the Retention Scenario inquire component, where you can review the scenario details.

Chapter 5

PeopleSoft Supplier Rating System Pagelets

This chapter provides an overview of Supplier Rating System pagelets and discusses how to view Supplier Rating System data through these pagelets.

Understanding Supplier Rating System Pagelets

The PeopleSoft Supplier Rating System includes three portal pagelets that you and your suppliers can use to access information from a portal homepage.

Viewing Supplier Rating System Data Through Pagelets

This section discusses how to:

- View the Supplier Rating By Item pagelet.
- View the Supplier Rating By Category pagelet.
- View the Supplier Rating By Supplier pagelet.

See Also

PeopleSoft Scorecard 9.1 PeopleBook, "Monitoring Scorecards and KPIs," Analyzing KPIs and Composite KPIs

Viewing the Supplier Rating By Item Pagelet

Displays key performance indicator (KPI) ratings and composite KPI weight for suppliers according to item.



Supplier Rating By Item pagelet

Search

Enter the setID and item ID, then click the Search button. The system displays the Supplier Rating - Analysis page (BC_PE_CKPI_ANLY_1), where users can view KPI ratings and composite KPI weight for suppliers for the specified item.

Viewing the Supplier Rating By Category Pagelet

Displays KPI ratings and composite KPI weight for suppliers according to category.



Supplier Rating By Category pagelet

Search

Enter the setID and category, then click the Search button. The system displays the Supplier Rating - Analysis page (BC_PE_CKPI_ANLY_1), where users can view KPI ratings and composite KPI weight for suppliers for the specified category.

Viewing the Supplier Rating By Supplier Pagelet

Displays KPI ratings and composite KPI weight for suppliers according to supplier.



Supplier Rating By Supplier

Supplier Rating By Supplier

*SetID: 🔍

*Vendor ID: 🔍

Supplier Rating By Supplier pagelet

Search

Enter the setID and vendor ID, then click the Search button. The system displays the Supplier Rating - Analysis page (BC_PE_CKPI_ANLY_1), where users can view KPI ratings and composite KPI weight for suppliers for the specified vendor.

Chapter 6

PeopleSoft Global Consolidations Pagelet

This chapter provides an overview of the PeopleSoft Global Consolidations pagelet and discusses how to view global consolidations data through that pagelet.

Understanding the PeopleSoft Global Consolidations Pagelet

Before using the PeopleSoft Global Consolidations pagelet, establish the default information to display on the pagelet on the User Preferences - Pagelets page (GC_USER_PREF_PLETS). Select Global Consolidations, Define Consolidations, Common Definitions, User Preference, Pagelets.

See *PeopleSoft Global Consolidations 9.1 PeopleBook*, "Establishing Consolidation Options and Supporting Objects," Defining User Preferences.

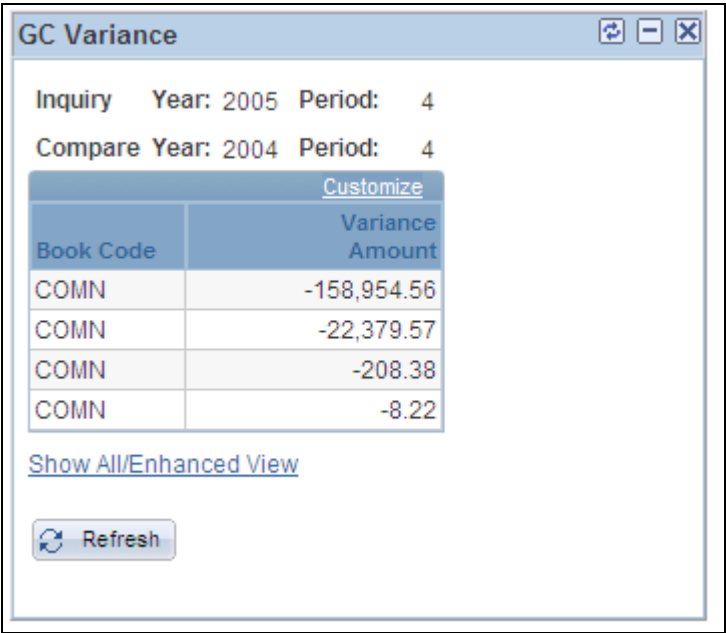
Use the pagelet to view global consolidation variances based on the default user preferences for pagelets.

Viewing Global Consolidations Data Through the PeopleSoft Global Consolidations Variance Pagelet

This section discusses how to view the PeopleSoft Global Consolidations Variance pagelet.

Viewing the PeopleSoft Global Consolidations Variance Pagelet

This pagelet provides the user with a quick glimpse into the largest variances between any PeopleSoft Global Consolidations comparison that the user defines.



PeopleSoft Global Consolidations Variance pagelet

Users can compare the differences between ledger balances for two different scenarios or time frames. Users can either compare the same scenario for different time frames or different scenarios. Common variances that the system analyzes include current period versus last period, current period versus same period last year, and current period actual versus current period budget. Users can define any comparison. For more comparison inquiry options, use the Ledger Inquiry component in PeopleSoft Global Consolidations.

See *PeopleSoft Global Consolidations 9.1 PeopleBook*, "Analyzing Consolidations," Comparing Ledger Balances.

Chapter 7

PeopleSoft Scorecard Pagelets

This chapter provides an overview of PeopleSoft Scorecard pagelets and discusses how to view scorecard data through these pagelets.

Understanding PeopleSoft Scorecard Pagelets

Use PeopleSoft Scorecard pagelets to quickly review key performance indicator (KPI) results; view assessment results for key scorecard components and KPIs; view how successfully you are achieving your goals within each balanced scorecard perspective; and view KPI dimension ranking, comparisons, and details.

Before you use these pagelets, set up a personal profile in the My Profile component (Scorecards, My Profile). This profile determines your default scorecard when you sign in, the business unit and scenario ID on which to base the data that appears on the pagelets, and display preferences for the pagelets.

Each pagelet displays a maximum of 10 rows of data unless specified otherwise. Links on pagelets take you to complete lists of data and greater details where applicable. All pagelets have row-level security applied, with the exception of the object ranking pagelets, because those pagelets are intended for view by customers and suppliers on your company web site.

Important! Use the Label field on the Portal Preferences page on the My Profile component to give meaningful labels to PeopleSoft Scorecard pagelets.

Viewing PeopleSoft Scorecard Data Through Pagelets

This section discusses how to:

- View the My Favorites pagelet.
- View the KPI List pagelet.
- View the Perspective Assessment pagelet.
- View the KPI Ranking 2 pagelet.
- View the KPI Comparison Ranking 2 pagelet.
- View the Single KPI Detail pagelet.
- View the Object Ranking pagelet.

Viewing the My Favorites Pagelet

Displays information about scorecard components and KPIs that you selected as favorites.

Displays assessment information for KPIs and strategy components by component type.

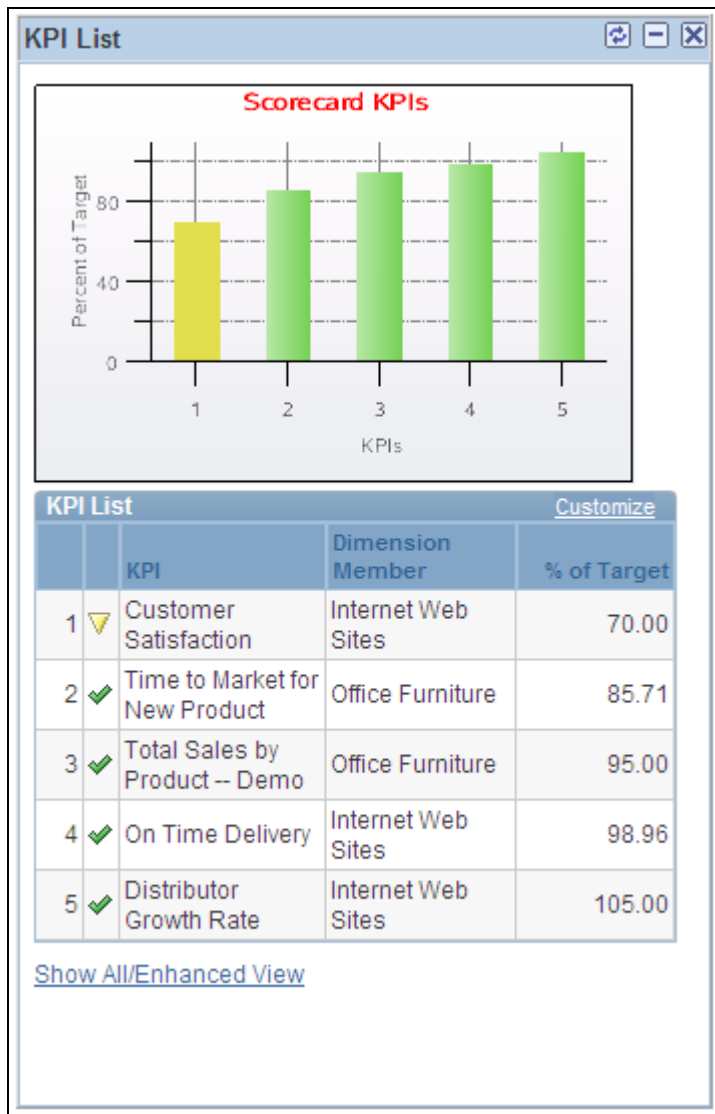
KPI/Component	Displays types in the following order: KPIs first, followed by strategy components in hierarchical order (vision, strategic thrusts, and critical success factors). Each type is sorted alphabetically by description. The dimension (for a KPI) or scorecard (for strategy components) associated with the item is also listed.
Show All/Enhanced View	Click this link to view additional rows in the extension pagelet. The extension pagelet additionally displays trend, actual value, target, and percent of target for each KPI or component, and you can remove items from the list of favorites by selecting the Remove check box and saving the pagelet.

On the Portal Preferences page, users can select the following preferences:

- Field to sort by (PCT_OF_TARGET or RESOLVED_VALUE).
- Sort order (ascending or descending).

Viewing the KPI List Pagelet

Displays assessment results for KPIs that belong to the default user-specified scorecard in the My Profile component.



KPI List pagelet

Displays assessment results and a bar chart of KPI performance. The KPIs are sorted based on user preference. The KPI dimension and percent of target also appear.

This pagelet displays the first five rows of data. Click the [Show All/Enhanced View](#) link to view additional rows in the extension pagelet. The extension pagelet additionally displays trend, actual value, and target (the target value).

On the Portal Preferences page, users can select the following preferences:

- Field to sort by (PCT_OF_TARGET or RESOLVED_VALUE).
- Sort order (ascending or descending).

Viewing the Perspective Assessment Pagelet

Displays assessment results for your default scorecard and is categorized by perspective.

Displays assessment information for each perspective of your scorecard. Use this pagelet to view how well each category is achieving its goals. This pagelet shows the first five rows of data.

Viewing the KPI Ranking 2 Pagelet

Displays a detailed list or chart of the top dimensions, such as top customers, channels, or vendors. This information is based on the KPI and preferences that users specify on the Portal Preferences page.

The system retrieves data according to the preferences set on the Portal Preferences page. There are four KPI ranking pagelets. You can display different dimensions on each KPI ranking pagelet by selecting different KPIs for each pagelet. For example, you can use one pagelet to display top vendors and another pagelet to display top projects. To define the data that appears on these pagelets, access the Portal Preferences page and select the following preferences:

- Business unit.
- Scenario ID.
- Show percent of target.
- Show resolved value.
- Meaningful label (for example, Top Vendors).
- Show assessment.
- Show trend indicator.
- Display preference (display the chart only, the list only, or both the list and chart).
- Field to sort by (PCT_OF_TARGET or RESOLVED_VALUE).
- Sort order (ascending or descending).
- One KPI.

Click the KPI Analysis link to access the KPI Analysis page and view more rows of data, perform detail analysis, and perform a what-if analysis.

See Also

PeopleSoft Scorecard 9.1 PeopleBook, "Monitoring Scorecards and KPIs," Analyzing KPIs and Composite KPIs

Viewing the KPI Comparison Ranking 2 Pagelet

Displays a comparison list of the top dimensions, such as top customers, channels, or vendors for the week. This information is based on the preferences and two KPIs that users specify on the Portal Preferences page.

The system retrieves data according to the preferences set on the Portal Preferences page. There are four KPI ranking pagelets; display different dimensions on each KPI comparison ranking pagelet by selecting different sets of KPIs for each pagelet. For example, you can use one pagelet to display top vendors this week and another pagelet to display top projects this week. To define the data that appears on these pagelets, access the Portal Preferences page and select the following preferences:

- Business unit.
- Scenario ID.
- Meaningful label (for example, Top Projects This Week).
- Display preference (such as the percent of target, assessment, resolved value, or trend).
- Field to sort by (PCT_OF_TARGET or RESOLVED_VALUE).
- Sort order (ascending or descending).
- Two KPIs.

The first KPI users select is the driving KPI and is the one that the system uses to get the data that they need; the second KPI offers supporting information.

Users can click the KPI Analysis link to access the KPI Analysis page and view more rows of data based on the first KPI.

See Also

PeopleSoft Scorecard 9.1 PeopleBook, "Monitoring Scorecards and KPIs," Analyzing KPIs and Composite KPIs

Viewing the Single KPI Detail Pagelet

Displays details of a single KPI and dimension, such as value, target, assessment, and trend. This information is based on the KPI, dimension, and preferences that users specify on the Portal Preferences page.

The system retrieves data according to the preferences set on the Portal Preferences page. There are four KPI ranking pagelets. You can display different KPI dimensions on each single KPI detail pagelet by selecting a different KPI and dimension for each pagelet. For example, you can use one pagelet to display customer satisfaction for the catalog sales dimension and another pagelet to display customer satisfaction for the Internet sales dimension. To define the data that appears on these pagelets, access the Portal Preferences page and select the following preferences:

- Business unit.
- Scenario ID.
- Show resolved value.
- Meaningful label (for example, Customer Satisfaction This Week).
- Show assessment.
- Show KPI target.

- Show trend indicator.
- One KPI and one dimension.

Users can click the KPI Analysis link to access the KPI Detail page and view additional information for that single KPI.

See Also

PeopleSoft Scorecard 9.1 PeopleBook, "Monitoring Scorecards and KPIs," Viewing KPI Details

Viewing the Object Ranking Pagelet

Displays an informational list of the top dimensions, such as top customers, channels, or vendors for the week. This information is based on the KPI and preferences that users specify on the Pagelet Preferences page.

The system retrieves data according to the preferences set on the Portal Preferences page. There are four KPI ranking pagelets. You can display different dimensions on each object ranking pagelet by selecting different KPIs for each pagelet. For example, you can use one pagelet to display top vendors and another pagelet to display top projects. These pagelets are exactly like the KPI ranking pagelets, except that these pagelets do not have row-level security and do not show numeric values for the dimensions. They are for informational purposes only and are intended for display on your company's web site (for viewing by customers and suppliers). To define the data that appears on these pagelets, access the Portal Preferences page and select the following preferences:

- Business unit.
- Scenario ID.
- Meaningful label (for example, Top Channels This Week).
- Field to sort by (PCT_OF_TARGET or RESOLVED_VALUE).
- Sort order (ascending or descending).
- One KPI.

Chapter 8

Delivered PeopleSoft Investor Portal KPIs

This chapter provides an overview of the delivered Investor Portal Key Performance Indicators (KPIs) and the Investor Portal solution, and discusses Investor Portal KPI technical detail.

Understanding Delivered Investor Portal KPIs and the Investor Portal Solution

The delivered Investor Portal KPIs are part of the PeopleSoft Investor Portal solution, which comprises a series of products that address corporate governance and corporate disclosures. These are:

- PeopleSoft Investor Portal Pack.

This provides much of the functionality around an investor web site and the internal management of the relevant content including pagelets, metrics for your investors, workflow, report generation capabilities, and content management libraries.

- PeopleSoft Applications Portal.

This provides a configurable, single gateway to information from PeopleSoft and non-PeopleSoft applications as well as a powerful content management module with check in and check out capabilities.

- PeopleSoft Scorecard.

This ensures a single source of data for your KPIs and supports the visualization of KPI data. The KPI pagelets enable your managers to drill directly into this application to review data in greater detail.

- PeopleSoft Enterprise Performance Management Portal Pack.

This provides pagelets and the Investor Portal and CFO Portal KPIs providing your managers with insight into key performance areas and enabling them to stay informed about progress toward the achievement of corporate goals.

The Investor Portal KPIs delivered as part of the PeopleSoft EPM Portal Pack enable you to accurately measure your company's performance. Designed to provide powerful business intelligence, they provide a single point of access to critical information. By monitoring KPIs, users across the enterprise can track the key performance areas of business for their areas of responsibility and stay informed about their progress toward achieving corporate goals.

These KPIs work together with the PeopleSoft CFO key performance indicators, described in the next chapter, to provide a complete picture of your company's performance.

The Investor Portal KPIs work with a preconfigured scorecard, which is a visual representation of how well your strategy is working, and provides you with information to help your decision in the event your strategy needs change.

The tables in this chapter provide information for each of the delivered Investor Portal KPIs. Use these tables to understand how the KPIs are derived and calculated. This information provides the details you need to be able to use and update the KPIs and target rules for your organization's specific business needs.

These KPIs are samples; the KPI dimension members and target rules should be changed to reflect your business requirements.

See *PeopleSoft Scorecard PeopleBook* for details on KPIs and scorecards.

See *PeopleSoft Investor Portal Solution PeopleBook* for details on configuring and using the Investor Portal solution.

Investor Portal KPI Source and Benchmark Data

To help you assess your company's performance and measure it against industry values, the Investor Portal KPIs use ledger data measuring your company's financial performance.

Investor Portal KPI Technical Detail

The following tables contain the details of each of the predefined Investor Portal KPIs. Use this information to help you understand the components upon which the KPIs are based, and to update them to better reflect your business requirements. It is important to understand the definition detail so that you will understand what is being calculated in your scorecard results. Some of the KPIs we deliver for the Investor Portal are manual KPIs. These KPIs are listed in a separated table. For these KPIs you will need to enter manual values to measure against the target rules.

This section discusses:

- KPI terminology.
- Manual Investor Portal KPIs
- Calculated Investor Portal KPIs.

See Also

PeopleSoft Scorecard 9.1 PeopleBook, "Establishing and Maintaining KPIs"

KPI Terminology

Many of the Investor Portal predefined KPIs are built using tablemaps, datamaps, filters, and constraints. These are the building blocks of EPM. Some of the KPIs are also manual KPIs, for which you need to manually enter values using the Manual KPI pages in the PeopleSoft Enterprise Performance Management database.

The following table lists KPI terminology used in the KPI detail sections that follow:

Term	Definition
KPI Definition	Defines a KPI to the system. You specify how to calculate it, the KPI dimension members, and their target rules.
What this KPI does	Narrative description of this KPI.
Calculation Description	<ul style="list-style-type: none"> • The analysis calculations that comprise the KPIs, which illustrate the record and fields being accessed. The tablemaps and datamaps access this information. • The type of aggregation that is occurring: This information is shown on the data element page. • The criteria necessary to access a specific field: This information is shown on the filter. • The fields that are being aggregated: This information is shown on the data element page.
Calculation Expression	The entry in the Calculation Expression field on the Calculation (KP_CALC_DEFN2) page.
Composite Pieces	KPIs used if this is a composite KPI; this is blank or n/a for all but composite KPIs.
Data Used in the KPI	KPI name or KPI ID. Not used for composite KPIs.
Calculation Definition	Defines calculations on which a KPI is based.
KPI Calculation Rule	Assigns calculation IDs to a KPI.
Tablemap	Defines the physical relationships between tables and is the foundation for datamaps.
Datamap	Enables you to define what subset of data gets processed by or uses a specific business rule.
Filter	Filters give you the ability to define what subset of data gets processed by or uses a specific business rule.
Constraint	Is based on datamaps. Constraints enable you to define business rules for processing and also enable you to reuse and group filters.

Term	Definition
Data Element	Defines a subset of data and the rules by which to group it. Data elements are used as the basis for key performance indicators and as target values for KPI members.
Model ID	Enables you to define the type of data you want to analyze and how you want to analyze it.
Scenario	Points to a Model ID and defines the business rules, economic assumptions, and chunking selection for processing.
KPI Dimension Members	Individual items for which a KPI is assessed.
KPI Target Rule	Rules that determine how a KPI dimension member is assessed.
Dimension	An attribute, such as time, product, and location, used to categorize or identify a particular piece of data. In the Enterprise Performance Management product line, you can view product, customer, and channel dimensions.
KPI Type	One of these: Manual, Calculated, Composite, Derived.

Additional Terminology

This section lists additional terminology.

Composite KPIs

Composite KPIs are like a collective scoring system that compares and evaluates dimensions across various attributes and determines an overall score. Composite KPIs can be based on any component KPIs, including other Composite KPIs. Composite KPI values are obtained by summing the component KPI values to produce an overall score. The KPIs used to form the composite can also be weighted, so that you can determine the percentage influence of each KPI on the overall score.

Manual KPIs

Manual KPIs do not use data derived from the data warehouse tables to determine their values, instead you enter their values using online pages, described in the *PeopleSoft Scorecard 9.1 PeopleBook*. Like calculated KPIs, manual KPIs use target rules to determine their assessment.

Naming Convention

The delivered KPIs follow a standardized naming convention. All Investor Portal KPIs begin with FSV_.

See Also

PeopleSoft Scorecard 9.1 PeopleBook, "PeopleSoft Scorecard 9.1 Preface"

PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook, "Oracle's PeopleSoft Enterprise Performance Management Fundamentals 9.1 Preface"

Manual Investor Portal KPIs

The following table lists the manual Investor Portal KPIs we deliver. For these KPIs you will need to enter manual values using the PeopleSoft Scorecard Manual KPI pages:

KPI ID	Description	KPI Type	KPI Target Rule
FSV_CUST	<p>Customer Satisfaction Composite.</p> <p>A combination of three business metrics to indicate levels of customer satisfaction. Expressed on a scale of 1 to 4, with 4.0 being a perfect score. Metrics include: customer retention, customer support response, and customer satisfaction survey.</p>	<p>Composite of three manual KPIs comprising:</p> <ul style="list-style-type: none"> FSV_CST01 (Customer Retention) Weighting 45% FSV_CST02 (Customer Support Response) Weighting 30% FSV_CST03 (Customer Satisfaction Survey) Weighting 25% 	<p>Target type = scorecard</p> <p>Rule: ≥ 95.00, green</p> <p>Rule: ≥ 90.00, yellow</p> <p>Rule: < 90.00, red</p>
FSV_INV	<p>Innovation Composite</p> <p>A combination of three business metrics to indicate levels of innovation. Expressed on a scale of 1 to 4, with 4.0 being a perfect score. Metrics include: percentage of new product revenues, new product pipeline, patents and patents pending.</p>	<p>Composite of three manual KPIs comprising:</p> <ul style="list-style-type: none"> FSV_INV01 (Percentage of new product revenues) Weighting 25% FSV_INV02 (New product pipeline) Weighting 40% FSV_INV03 (Patents and patents pending) Weighting 35% 	<p>Target type = scorecard</p> <p>Rule: ≥ 95.00, green</p> <p>Rule: ≥ 90.00, yellow</p> <p>Rule: < 90.00, red</p>

<i>KPI ID</i>	<i>Description</i>	<i>KPI Type</i>	<i>KPI Target Rule</i>
FSV_QUAL	<p>Quality Composite.</p> <p>A combination of three business metrics to indicate levels of quality—quality of people, processes, and products. Expressed on a scale of 1 to 4, with 4.0 being a perfect score. Metrics include: six sigma/ISO certification, percentage of employees in training, and utilization (billable hours).</p>	<p>Composite of three manual KPIs comprising:</p> <ul style="list-style-type: none"> FSV_QAL01 (Six sigma/ISO certification) Weighting 33% FSV_QAL02 (Percentage of employees in training) Weighting 33% FSV_QAL03 (Utilization) Weighting 33% 	<p>Target type = scorecard</p> <p>Rule: >= 95.00, green</p> <p>Rule: >= 90.00, yellow</p> <p>Rule: < 90.00, red</p>
FSV_FIN	<p>Financial Composite</p> <p>A combination of three business metrics to indicate levels of financial health—D&B rating, credit rating, financial stress. Expressed on a scale of 1 to 4, with 4.0 being a perfect score. Metrics include: Dun & Bradstreet rating, credit rating, and financial stress rating.</p>	<p>Composite of three manual KPIs comprising:</p> <ul style="list-style-type: none"> FSV_FIN01 (D&B rating) Weighting 40% FSV_FIN02 (Credit rating) Weighting 30% FSV_FIN03 (Financial stress) Weighting 33% 	<p>Target type = scorecard</p> <p>Rule: >= 95.00, green</p> <p>Rule: >= 90.00, yellow</p> <p>Rule: < 90.00, red</p>

Calculated Investor Portal KPIs

The following sections list technical details of the calculated Investor Portal KPIs delivered for use with the PeopleSoft EPM Portal Pack.

Note. The Investor Portal KPIs are calculated based on quarterly periods, not the regular monthly period of the source data. The view PS_LEDGER_F00_VW2, used in the tablemap and datamap, handles the mapping from the detail period to the quarterly period.

The run control for running BC_ANALYZE for these KPIs shows quarter as the period for running the process.

Return on Assets

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_ASRET
What this KPI does	This KPI measures how well a company is using its assets to generate earnings independent of the financing of those assets by dividing the fiscal year earnings from total operations (not including extraordinary items) by the total assets, expressed as a percentage.
Calculation Description	Total net income divided by total assets.
Calculation Expression	$FSV_NIVC * 100 / FSV_ASSET$
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_NIVC FSV_ASSET
Calculation Definition (Calculation ID)	FSV_ASRET
KPI Calculation Rule ID	FSV_ASRET
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_ACCT05, FSV_LED01, FSV_ACCTPER02
Constraint	FSV_NIVC, FSV_ASSET
Data Element	FSV_NIVC, FSV_ASSET
Model ID	FSK
Scenario	FSV_SCENAR

Definition Detail	Value
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business unit
Perspective Type	Financial

Beta

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_BETA
What this KPI does	This KPI measures the beta of a given stock.
Calculation Description	Latest market data value on the FSVMD_RLTMFD table.
Calculation Expression	FSV_BETA
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_BETA
Calculation Definition (Calculation ID)	FSV_BETA
KPI Calculation Rule ID	FSV_BETA
Tablemap	FSV_REALTM
Datamap	FSV_REALTM

Definition Detail	Value
Filter	FSV_BETA FSV_TICKER
Constraint	FSV_BETA
Data Element	FSV_BETA
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business Unit
Perspective Type	Financial

Debt to Equity

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_D2E
What this KPI does	This KPI monitors a company's leverage by dividing the fiscal year-end long-term debt by total common equity (a dollar amount), as taken from the latest 10K report.
Calculation Description	Divide the fiscal year-end debt by the total equity.
Calculation Expression	FSV_DEBT / FSV_EQUITY
KPI Type	Calculated

Definition Detail	Value
Composite Pieces	Not applicable
Data Used in the KPI	FSV_DEBT FSV_EQUITY
Calculation Definition (Calculation ID)	FSV_D2E
KPI Calculation Rule ID	FSV_D2E
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_LED01, FSV_ACCTPER02, FSV_ACCT10, FSV_LED01
Constraint	FSV_SHARES FSV_DEBT
Data Element	FSV_SHARES FSV_DEBT
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business unit
Perspective Type	Financial

Dividend Yield

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_DVRET
What this KPI does	This KPI monitors the money your company makes on your investment as a percentage by dividing the latest dividend rate by the latest closing price.
Calculation Description	Dividend rate divided by outstanding shares divided by the current share price.
Calculation Expression	$FSV_DIVIDE * 100 / FSV_SHARES / FSV_SPVC$
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_DIVIDE FSV_SHARES FSV_SPVC
Calculation Definition (Calculation ID)	FSV_DVRET
KPI Calculation Rule ID	FSV_DVRET
Tablemap	FSV_LEDGER FSV_REALTM
Datamap	FSV_LEDGER FSV_REALTM
Filter	FSV_SHARES FSV_SPVC FSV_ACCT09, FSV_LED01, FSV_ACCTPER02, FSV_ACCTPER03

Definition Detail	Value
Constraint	FSV_SHARES FSV_SPVC FSV_DIVIDEN
Data Element	FSV_SHARES FSV_SPVC FSV_DIVIDE
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business unit
Perspective Type	Financial

Earnings per Share

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_EPS
What this KPI does	This KPI monitors the earnings per share in dollars by dividing the net income by the total outstanding number of shares.
Calculation Description	Net income divided by outstanding shares.
Calculation Expression	FSV_NIVC/FSV_SHARES

Definition Detail	Value
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_NIVC FSV_SHARES
Calculation Definition (Calculation ID)	FSV_EPS
KPI Calculation Rule ID	FSV_EPS
Tablemap	FSV_LEDGER FSV_REALTM
Datamap	FSV_LEDGER FSV_REALTM
Filter	FSV_ACCT01, FSV_ACCT02, FSV_LED01, FSV_ACCTPER01, FSV_ACCT10, FSV_LED01, FSV_ACCTPER02 FSV_SHARES
Constraint	FSV_NIVC, FSV_SHARES
Data Element	FSV_NIVC, FSV_SHARES
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business Unit

Definition Detail	Value
Perspective Type	Financial

Prior Period Earnings per Share

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_EPS-1
What this KPI does	This KPI monitors the earnings per share for the prior period in dollars by dividing the net income by the total outstanding number of shares.
Calculation Description	Net income divided by outstanding shares.
Calculation Expression	FSV_NIVC/FSV_SHARES
KPI Type	Derived
Composite Pieces	Not applicable
Data Used in the KPI	Not applicable
Calculation Definition (Calculation ID)	Not applicable
KPI Calculation Rule ID	Not applicable
Tablemap	FSV_LEDGER FSV_REALTM
Datamap	FSV_LEDGER FSV_REALTM
Filter	Not applicable
Constraint	Not applicable

Definition Detail	Value
Data Element	Not applicable
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Not applicable
Dimension	Business Unit
Perspective Type	Financial

Earnings Growth Per Share

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_EPSGR
What this KPI does	This KPI monitors the earnings per share expressed as a month-over-month (as well the cumulative tab and last year tab reflecting quarter-over-quarter and year-over-year) percentage change.
Calculation Description	Current earnings per share minus prior period earnings per share divided by the prior period earnings per share.
Calculation Expression	$(FSV_EPS - FSV_EPS-1) * 100 / FSV_EPS-1$
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_EPS FSV_EPS-1
Calculation Definition (Calculation ID)	FVS_EPSGR

Definition Detail	Value
KPI Calculation Rule ID	FSV_EPSGR
Tablemap	FSV_LEDGER FSV_REALTM
Datamap	FSV_LEDGER FSV_REALTM
Filter	FSV_ACCT01, FSV_ACCT02, FSV_LED01, FSV_ACCTPER01, FSV_ACCT10, FSV_LED01, FSV_ACCTPER02 FSV_SHARES
Constraint	FSV_NIVC, FSV_SHARES
Data Element	FSV_NIVC, FSV_SHARES
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business unit
Perspective Type	Financial

Return on Equity

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_EQRET

Definition Detail	Value
What this KPI does	This KPI monitors the return on equity as a percentage by dividing the fiscal year total net income by stockholders' equity (as taken from the 10K).
Calculation Description	Total net income divided by stockholders' equity.
Calculation Expression	FSV_NIVC * 100 / FSV_EQUITY
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_NIVC FSV_EQUITY
Calculation Definition (Calculation ID)	FSV_EQRET
KPI Calculation Rule ID	FSV_EQRET
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_ACCT08, FSV_LED01, FSV_ACCTPER02
Constraint	FSV_NIVC, FSV_EQUITY
Data Element	FSV_NIVC, FSV_EQUITY
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red

Definition Detail	Value
Dimension	Business unit
Perspective Type	Financial

Market Capitalization

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_MKTCAP
What this KPI does	This KPI measures the market capitalization of a given stock.
Calculation Description	The number of outstanding shares multiplied by the current share priced.
Calculation Expression	FSV_SHARES * FSV_SPVC
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_SHARES FSV_SPVC
Calculation Definition (Calculation ID)	FSV_MKTCAP
KPI Calculation Rule ID	FSV_SPVC
Tablemap	FSV_REALTM
Datamap	FSV_REALTM

Definition Detail	Value
Filter	FSV_SHARES FSV_SPVC FSV_TICKER
Constraint	FSV_SHARES FSV_SPVC
Data Element	FSV_SHARES FSV_SPVC
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Not applicable
Dimension	Business Unit
Perspective Type	Financial

Operating Margin

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_MGN
What this KPI does	This KPI monitors the operating margin as a percentage obtained by dividing the operating income by gross revenue.
Calculation Description	Operating income divided by the gross revenue.
Calculation Expression	$FSV_OIVC * 100 / FSV_REWC$
KPI Type	Calculated

Definition Detail	Value
Composite Pieces	Not applicable
Data Used in the KPI	FSV_OIVC FSV_REWC
Calculation Definition (Calculation ID)	FSV_MGN
KPI Calculation Rule ID	FSV_MGN
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_ACCT03, FSV_ACCT04, FSV_LED01, FSV_ACCTPER01
Constraint	FSV_OIVC, FSV_REVVC
Data Element	FSV_OIVC, FSV_REVVC
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business unit
Perspective Type	Financial

Market Capitalization

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_MKTCAP
What this KPI does	This KPI measures the market capitalization of a given stock.
Calculation Description	Number of outstanding shares multiplied by the current share price.
Calculation Expression	FSV_SHARES * FSV_SPVC
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_SHARES, FSV_SPVC
Calculation Definition (Calculation ID)	FSV_MKTCAP
KPI Calculation Rule ID	FSV_MKTCAP
Tablemap	FSV_REALTM
Datamap	FSV_REALTM
Filter	FSV_SHARES, FSV_SPVC, FSV_TICKER
Constraint	FSV_SHARES, FSV_SPVC
Data Element	FSV_SHARES, FSV_SPVC
Model ID	FSK
Scenario	FSV_SCENAR

Definition Detail	Value
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business Unit
Perspective Type	Financial

NPV Cash Flow

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_NPV
What this KPI does	This KPI monitors the cash flow discounted to the net present value (NPV).
Calculation Description	Multiply the operating cash flows from the general ledger (tree structure) and the NPV factor.
Calculation Expression	FSV_CASHVC * FSV_NPVFAC
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_CASHVC FSV_NPVFAC
Calculation Definition (Calculation ID)	FSV_NPV
KPI Calculation Rule ID	FSV_NPV
Tablemap	FSV_LEDGER

Definition Detail	Value
Datamap	FSV_LEDGER
Filter	FSV_ACCT11, FSV_LED01, FSV_LED02
Constraint	FSV_CASHVC
Data Element	FSV_CASHVC
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business Unit
Perspective Type	Financial

Price Earning Ratio

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_PE
What this KPI does	This KPI monitors the price earning ratio for a stock by dividing the stock price by its earnings per share.
Calculation Description	Stock price divided by the earning per share.
Calculation Expression	FSV_SPVC / FSV_EPS
KPI Type	Calculated

Definition Detail	Value
Composite Pieces	Not applicable
Data Used in the KPI	FSV_SPVC FSV_EPS
Calculation Definition (Calculation ID)	FVS_PE
KPI Calculation Rule ID	FSV_PE
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_ACCT01, FSV_ACCT02, FSV_LED01, FSV_ACCTPER01, FSV_ACCT10, FSV_LED01, FSV_ACCTPER02 FSV_SPVC is manual
Constraint	FSV_NIVC, FSV_SHARES FSV_SPVC is manual
Data Element	FSV_NIVC, FSV_SHARES FSV_SPVC is manual
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business unit
Perspective Type	Financial

Quick Ratio

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_QUICK
What this KPI does	This KPI monitors a company's short-term liquidity by dividing the fiscal year-end cash and equivalents plus receivables by current liabilities, as taken from the 10K.
Calculation Description	Divide total assets by current liabilities.
Calculation Expression	FSV_ASSET / FSV_LIAB
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_ASSET FSV_LIAB
Calculation Definition (Calculation ID)	FSV_QUICK
KPI Calculation Rule ID	FSV_QUICK
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_ACCT05, FSV_LED01, FSV_ACCTPER02, FSV_ACCT06
Constraint	FSV_ASSET, FSV_LIAB
Data Element	FSV_ASSET, FSV_LIAB
Model ID	FSK

Definition Detail	Value
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business unit
Perspective Type	Financial

Gross Revenue

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_REV
What this KPI does	This KPI monitors the gross revenue.
Calculation Description	Gross revenue
Calculation Expression	FSV_REWC
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_REWC
Calculation Definition (Calculation ID)	FSV_REWC
KPI Calculation Rule ID	FSV_REWC
Tablemap	FSV_LEDGER

Definition Detail	Value
Datamap	FSV_LEDGER
Filter	FSV_ACCT01 FSV_LED01 FSV_ACCTPER01
Constraint	FSV_REWC
Data Element	FSV_REWC
Model ID	FSK
Scenario	FSK_SCENAR
KPI Target Rule	Not applicable
Dimension	Business unit
Perspective Type	Financial

Prior Period Revenue

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_REV-1
What this KPI does	This KPI shows the gross revenue for the prior period.
Calculation Description	Not applicable
Calculation Expression	Not applicable
KPI Type	Derived
Composite Pieces	Not applicable

Definition Detail	Value
Data Used in the KPI	FSV_REV Different timespan
Calculation Definition (Calculation ID)	Not applicable
KPI Calculation Rule ID	Not applicable
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_ACCT01 FSV_LED01 FSV_ACCTPER01
Constraint	FSV_REWC
Data Element	FSV_REWC
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Not applicable
Dimension	Business unit
Perspective Type	Financial

Revenue Growth

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_REVGR

Definition Detail	Value
What this KPI does	This KPI monitors the period-over-period percentage change of gross revenues.
Calculation Description	Current gross revenue minus prior period gross revenue divided by the prior period gross revenue.
Calculation Expression	$(FSV_REV - FSV_REV-1) * 100 / FSV_REV-1$
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_REV FSV_REV-1
Calculation Definition (Calculation ID)	FSV_REVGR
KPI Calculation Rule ID	FSV_REVGR
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_ACCT01 FSV_LED01 FSV_ACCTPER01
Constraint	FSV_REWC
Data Element	FSV_REWC
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Not applicable

Definition Detail	Value
Dimension	Business unit
Perspective Type	Financial

Share Price

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSV_SPVC
What this KPI does	This KPI measures share price of a given stock.
Calculation Description	The share price based on the latest market data value on the FSVMD_RLTMFD table.
Calculation Expression	FSV_SPVC
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_SPVC
Calculation Definition (Calculation ID)	FSV_SPVC
KPI Calculation Rule ID	FSV_SPVC
Tablemap	FSV_REALTM
Datamap	FSV_REALTM
Filter	FSV_SPVC FSV_TICKER
Constraint	FSV_SPVC

<i>Definition Detail</i>	<i>Value</i>
Data Element	FSV_SPVC
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Not applicable
Dimension	Business Unit
Perspective Type	Financial

Chapter 9

PeopleSoft CFO Portal and PeopleSoft Government Portal Solutions

This appendix provides an overview of PeopleSoft CFO Portal and PeopleSoft Government Portal solutions and describes the technical KPI detail.

Understanding CFO and Government Portal KPIs

The PeopleSoft CFO Portal and PeopleSoft Government Portal solutions enable you to predict, measure, and manage your business more effectively. Designed to provide powerful business intelligence, each solution creates a single point of access to critical information. By monitoring key performance indicators (KPIs), your users across the enterprise can track the key performance areas of business for their areas of responsibility and stay informed about their progress toward achieving corporate goals.

The PeopleSoft CFO Portal and PeopleSoft Government Portal solutions consist of the following:

- KPIs (as described in this appendix).
- PeopleSoft EPM Portal Pack.
- PeopleSoft Financials Portal Pack.
- PeopleSoft Applications Portal.
- PeopleSoft Scorecard.

PeopleSoft CFO Portal also delivers a preconfigured CFO Scorecard, which is a visual representation of how well your strategy is working, and provides you with information to help your decision in the event your strategy needs change.

The summary and detail tables in this appendix provide information for each predefined KPIs that we deliver in the PeopleSoft CFO Portal and PeopleSoft Government Portal solutions. Use these tables to understand how the KPIs are derived and calculated. This information provides the details you need to be able to use and update the KPIs and target rules for your organization's specific business needs.

These KPIs are samples; the KPI objects and target rules should be changed to reflect your business requirements.

Note. The predefined KPIs that we deliver in the PeopleSoft CFO Portal and PeopleSoft Government Portal solutions are also available for use with the PeopleSoft Campus Portal solution.

Terminology

The predefined KPIs are built using tablemaps, datamaps, filters, and constraints. These are the building blocks of EPM. In addition to these key components, these KPIs use the PeopleSoft Scorecard tools to construct the analysis calculation, and the rules and relationships pertaining to the individual KPIs.

Calculation	<p>The analysis calculations that comprise the KPIs illustrate:</p> <ul style="list-style-type: none"> • The record and fields being accessed. This information is accessed by the tablemaps and datamaps. • The criteria necessary to access a specific field. This information is shown on the filter. • The type of aggregation that is occurring. This information is shown on the data element page. • The fields that are being aggregated. This information is shown on the data element page.
Tablemap	Defines the physical relationships between tables and is the foundation for datamaps.
Datamap	Brings together information from the different tables specified in a tablemap and defines it as if it were one entity or table.
Filter	Filters give you the ability to define what subset of data gets processed by or uses a specific business rule.
Constraint	Constraints are based on datamaps. Constraints enable you to define business rules for processing and also enable you to reuse and group Filters.
Data Element	Defines a subset of data and the rules by which to group it. Data elements are used as the basis for key performance indicators, and as target values for Key Performance Indicator (KPI) objects.
Calculation Definition	Defines calculations on which a KPI is based.
KPI Definition	To define a KPI to the system, you'll specify how to calculate it, the KPI objects, and their target rules.
Model ID	Models enable you to define the type of data you want to analyze and how you want to analyze it.
Scenario	A Scenario points to a Model ID and defines the Business Rules, Economic Assumptions, and Chunking Selection for processing.
KPI Calculation Rule	Assigns Calculation IDs to a KPI.
KPI Objects	The individual elements, or rows of data, assessed for a KPI.

KPI Target Rule	Rules that determine how a KPI object is assessed.
Strategy KPIs	Calculated values by which you assess your critical success factors, strategic thrusts, and strategic initiatives. A KPI is associated with a strategy tree component or strategic initiative.
Dimension	A dimension is a particular view (or slice from a certain perspective) of data. In the Enterprise Performance Management product line, you have the choice of viewing product, customer, sales territory, marketing campaign, support organization, business unit, and channel dimensions.
Perspective Type	A category for organizing CSFs and KPIs. Usually there are four: financial, customer, internal process, learning and growth.

See *PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook*, "Oracle's PeopleSoft Enterprise Performance Management Fundamentals 9.1 Preface."

See *PeopleSoft Scorecard 9.1 PeopleBook*, "PeopleSoft Scorecard 9.1 Preface."

PeopleSoft CFO Portal and Government Portal KPI Technical Detail

The following tables contain the details of each predefined KPI that we deliver in the CFO Portal and Government Portal solutions. Use this information to help you understand the components upon which the KPIs are based, and to update them to better reflect your business requirements.

The predefined KPIs are the basis of the PeopleSoft CFO Portal and PeopleSoft Government Portal solutions. It is important to understand the definition detail so that you will understand what is being calculated in your scorecard results. This section provides a definition of the data comprising each KPI.

Days Sales Outstanding

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_AR01
What this KPI does	This KPI monitors days sales outstanding by business unit.
Calculation Description	Days Sales Outstanding
Calculation Expression	FSK_DE_DSO

Definition Detail	Value
KPI Type	Manual
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_AR0 (Days Sales Outstanding) DE: FSK_DE_DSO
Calculation Definition (Calculation ID)	FSK_DSO90
KPI Calculation Rule ID	FSK_DE_DSO
Tablemap	FSK_CSTHST
Datamap	FSK_CSTHST
Filter	FSK_FILTER_DSO90
Constraint	FSK_CN_DSO90
Data Element	FSK_DE_DSO
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CORP1
KPI Target Rule	Target Type: = Numeric
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable

Definition Detail	Value
Critical Success Factor	Not applicable

Sales Pipeline by BU

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_CRM_BU
What this KPI does	This KPI monitors the sales pipeline by business unit.
Calculation Description	Opportunities Closed + Opportunities Committed to Close
Calculation Expression	FSK_DCBU1 + FSK_DE_CB1
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_CRM_BU (Sales Pipeline by BU) DE: FSK_DCBU1 (Opportunities committed to Close by business unit) DE: FSK_DE_CB1 (Opportunities Closed by business unit) DE: FSK_DE_FBU (Forecasted Sales by business unit)
Calculation Definition (Calculation ID)	FSK_CRM_BU
KPI Calculation Rule ID	FSK_CRM_BU
Tablemap	OPPORTUNIT
Datamap	FSK_OPPF00

Definition Detail	Value
Filter	FSK_FILTER_COM FSK_CLOSED_OPP_4TER
Constraint	FSK_CN_COMMITTED FSK_CN_CLOSED
Data Element	FSK_DCBU1 (Opportunities committed to Close by business unit) FSK_DE_CB1 (Opportunities Closed by business unit) FSK_DE_FBU (Forecasted Sales by business unit)
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CORP1
KPI Target Rule	Target Type: = % of Target Primary Target = FSK_DE_FBU (Forecasted Sales by BU)
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Sales Pipeline by Territory

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_CRM_TR
What this KPI does	This KPI monitors the sales pipeline by sales territory.
Calculation Description	Closed by Territory + Committed by Territory
Calculation Expression	FSK_DE_CT1 + FSK_DECTR1
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_CRM_TR (Sales Pipeline by Territory) DE: FSK_DE_CT1 (Opportunities Closed within a Territory) DE: FSK_DECTR1 (Opportunities Committed to Close by Territory) DE: FSK_DE_FTR (Sales Forecast by Territory)
Calculation Definition (Calculation ID)	FSK_CA_CRM
KPI Calculation Rule ID	FSK_CA_CRM
Tablemap	OPPORTUNIT
Datamap	FSK_OPPF00
Filter	FSK_CLOSED_OPP_4TER FSK_FILTER_COM
Constraint	FSK_CN_CLOSED FSK_CN_COMMITTED
Data Element	FSK_DE_CT1 Opportunities Closed within a Territory FSK_DECTR1 Opportunities Committed to Close by Territory FSK_DE_FTR Sales Forecast by Territory

Definition Detail	Value
Model ID	FSK
Scenario	Not applicable
KPI Object	Sales Territory Includes: JAPAN MID ATLANTIC NORTH CENTRAL NORTH EAST NORTH WEST SOUTH EAST SOUTH WEST
KPI Target Rule	Target Type = % of Target Primary Target = FSK_DE_FTR
Object Type (Dimension)	TERRITORY
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

FX Exposures: Deutsche Mark

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_FX_DEM
What this KPI does	This KPI monitors total exposures for Deutsche marks by business unit.

Definition Detail	Value
Calculation Description	
Calculation Expression	FSK_CURDEM
KPI Type	Manual
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_FX_DEM (FX Exposures: Deutsch Mark) DE: FSK_CURDEM
Calculation Definition (Calculation ID)	FSK_DEM
KPI Calculation Rule ID	FSK_DEM
Tablemap	LEDGER_F00
Datamap	LEDGER_F00
Filter	FSK_BASE_CUR_DEM FSK_GLAR
Constraint	FSK_BASE_CUR_DEM
Data Element	FSK_CURDEM
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CORP1 CORP2
KPI Target Rule	Target Type = Numeric

<i>Definition Detail</i>	<i>Value</i>
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

FX Exposures: Spanish Peseta

This section discusses the KPI definition detail:

<i>Definition Detail</i>	<i>Value</i>
KPI Definition (KPI ID)	FSK_FX_ESP
What this KPI does	This KPI monitors total exposures for Spanish peseta by business unit.
Calculation Description	
Calculation Expression	FSK_CURESP
KPI Type	Manual
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_FX_ESP (FX Exposures: Spanish Peseta) DE: FSK_CURESP
Calculation Definition (Calculation ID)	FSK_ESP
KPI Calculation Rule ID	FSK_ESP
Tablemap	LEDGER_F00

Definition Detail	Value
Datamap	LEDGER_F00
Filter	FSK_BASE_CUR_ESP FSK_GLAR
Constraint	FSK_BASE_CUR_ESP
Data Element	FSK_CURESP
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CORP1
KPI Target Rule	Target Type = Numeric
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

FX Exposures: Euro

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_FX_EUR

Definition Detail	Value
What this KPI does	This KPI monitors total exposures for the Euro by business unit.
Calculation Description	
Calculation Expression	FSK_CUREUR
KPI Type	Manual
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_FX_EUR (FX Exposures: Euro) DE: FSK_CUREUR
Calculation Definition (Calculation ID)	FSK_EUR
KPI Calculation Rule ID	FSK_EUR
Tablemap	LEDGER_F00
Datamap	LEDGER_F00
Filter	FSK_BASE_CUR_EUR FSK_GLAR
Constraint	FSK_BASE_CUR_EUR
Data Element	FSK_CUREUR
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CORP1

Definition Detail	Value
KPI Target Rule	Target Type = Numeric
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

FX Exposures: Pounds Sterling Silver

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_FX_GBP
What this KPI does	This KPI monitors total exposures for pound sterling silver (GBP) by business unit.
Calculation Description	
Calculation Expression	FSK_CURGBP
KPI Type	Manual
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_FX_GBP (FX Exposures: Pounds Sterling Silver) DE: FSK_CURGBP
Calculation Definition (Calculation ID)	FSK_GBP
KPI Calculation Rule ID	FSK_GBP

Definition Detail	Value
Tablemap	LEDGER_F00
Datamap	LEDGER_F00
Filter	FSK_BASE_CUR_GBP FSK_GLAR
Constraint	FSK_BASE_CUR_GBP
Data Element	FSK_CURGBP
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CORP1
KPI Target Rule	Target Type = Numeric
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

FX Exposures: US Dollar

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_FX_USD

Definition Detail	Value
What this KPI does	This KPI monitors total exposures for United States dollar by business unit.
Calculation Description	
Calculation Expression	FSK_CURUSD
KPI Type	Manual
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_FX_USD (FX Exposures: US Dollar) DE: FSK_CURUSD
Calculation Definition (Calculation ID)	FSK_USD
KPI Calculation Rule ID	FSK_USD
Tablemap	LEDGER_F00
Datamap	LEDGER_F00
Filter	FSK_BASE_CUR_USD FSK_GLAR
Constraint	FSK_BASE_CUR_USD
Data Element	FSK_CURUSD
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CORP1

Definition Detail	Value
KPI Target Rule	Target Type = Numeric
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Total Headcount

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_HR01
What this KPI does	This KPI monitors actual head count of full-time employees by business unit.
Calculation Description	
Calculation Expression	FSK_A_HCNT
KPI Type	Manual
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_HR01 (Total Headcount) DE: FSK_A_HCNT (Actual Full-Time Employee Headcount) DE: FSK_HCOUNT (Budgeted Employee Headcount)
Calculation Definition (Calculation ID)	FSK_C_HEAD
KPI Calculation Rule ID	FSK_C_HEAD

Definition Detail	Value
Tablemap	JOBF_POSN
Datamap	JOBF_POSN
Filter	FSK_FULL_TIME_EMPL
Constraint	FSK_FULL_TIME_EMPL
Data Element	FSK_A_HCNT (Actual Full-Time Employee Headcount) FSK_HCOUNT (Budgeted Employee Headcount)
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CONSL CORP1 COPR2 EPM01
KPI Target Rule	Target Type = % Target Primary Target = FSK_HCOUNT (Budgeted Employee Headcount)
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Headcount Offers Extended

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_HR02
What this KPI does	This KPI monitors headcount offers extended by business unit.
Calculation Description	Actual Full-Time Employee Headcount + Approved Job Requisitions
Calculation Expression	FSK_A_HCNT + FSK_DE_REQ
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_HR02 (Headcount Offers Extended) DE: FSK_A_HCNT (Actual Full-Time Employee Headcount) DE: FSK_DE_REQ (Approved Job Requisitions) DE: FSK_HCOUNT (Budgeted Employee Headcount)
Calculation Definition (Calculation ID)	FSK_EX_OF
KPI Calculation Rule ID	FSK_EX_OF
Tablemap	JOBF_POSN FSK_JOBREQ
Datamap	JOBF_POSN FSK_JOBREQ
Filter	FSK_FULL_TIME_EMPL FSK_FILTER_JOBREQAP

Definition Detail	Value
Constraint	FSK_FULL_TIME_EMPL FSK_CN_APP_JOB_REQS
Data Element	FSK_A_HCNT (Actual Full-Time Employee Headcount) FSK_DE_REQ (Approved Job Requisitions) FSK_HCOUNT (Budgeted Employee Headcount)
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CONSL CORP1 COPR2 EPM01
KPI Target Rule	Target Type = % Target Primary Target = FSK_HCOUNT (Budgeted Employee Headcount)
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Purchasing Commitments

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_PO01
What this KPI does	This KPI monitors purchasing commitments by business unit.
Calculation Description	Committed purchase orders + Open purchase orders
Calculation Expression	FSK_COM_PO + FSK_OPENPO
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_PO01 (Purchasing Commitments) DE: FSK_COM_PO (Committed Purchase Orders) DE: FSK_OPENPO (Open Purchase Orders) DE: FSK_BGTEXP (Budgeted Expenses: Purchasing)
Calculation Definition (Calculation ID)	FSK_PRCHSN
KPI Calculation Rule ID	FSK_PRCHSN
Tablemap	FSK_PODIST
Datamap	FSK_PODIST
Filter	FSK_COMMITTED_POS FSK_OPEN_PO
Constraint	FSK_COMMITTED_POS FSK_OPEN_POS
Data Element	FSK_COM_PO (Committed Purchase Orders) FSK_OPENPO (Open Purchase Orders) FSK_BGTEXP (Budgeted Expenses: Purchasing)
Model ID	FSK

Definition Detail	Value
Scenario	Not applicable
KPI Object	Business Unit Includes: CORP1
KPI Target Rule	Target Type = % Target Primary Target = FSK_BGTEXP (Budgeted Expenses: Purchasing)
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Cash Position

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_TR01
What this KPI does	This KPI monitors cash position by business unit.
Calculation Description	This calculation uses KPIs instead of Data Elements
Calculation Expression	FSK_TR01 – FSK_PASCOL
KPI Type	Composite

Definition Detail	Value
Composite Pieces	KPIs used: <ul style="list-style-type: none"> FSK_TR01 (Expected collections this period). FSK_PASCOL (Expected Collections last period).
Data Used in the KPI	KPI: FSK_TR01 (Cash Position)
Calculation Definition (Calculation ID)	FSK_CSHCOL
KPI Calculation Rule ID	FSK_CSHCOL
Tablemap	FSK_POSTR FSK_CSTHST
Datamap	FSK_POSTR FSK_CSTHST
Filter	FSK_IMPCTHDR FSK_CUSTOMER_HIST
Constraint	FSK_POS_IMPACT_HDR FSK_CUSTOMER_HISTORY
Data Element	
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CONSL CORP1 COPR2 EPM01
KPI Target Rule	Target Type = Numeric

Definition Detail	Value
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Large Deal Maturities

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_TR03
What this KPI does	This KPI monitors large deal maturities by business unit.
Calculation Description	
Calculation Expression	FSK_LGDEAL
KPI Type	Manual
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_TR03 (Large Deal Maturities) DE: FSK_LGDEAL (Large Deal Maturity)
Calculation Definition (Calculation ID)	FSK_LGDEAL
KPI Calculation Rule ID	FSK_LGDEAL
Tablemap	FSK_TRXDTL

Definition Detail	Value
Datamap	FSK_TRXDTL
Filter	FSK_MATURE_DEALS
Constraint	FSK_MATURE_DEALS
Data Element	FSK_LGDEAL (Large Deal Maturity)
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CONSL CORP1 COPR2 EPM0
KPI Target Rule	Target Type = Numeric
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Vendor Threshold

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_VEND1

Definition Detail	Value
What this KPI does	This KPI monitors vendor threshold by vendor ID.
Calculation Description	
Calculation Expression	FSK_VENDOR
KPI Type	Manual
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_VEND1 (Vendor Threshold) DE: FSK_VENDOR (Payments by Vendor)
Calculation Definition (Calculation ID)	FSK_VEND1
KPI Calculation Rule ID	FSK_VEND1
Tablemap	FSK_PYMNT
Datamap	FSK_PYMNT
Filter	FSK_SPECIFIC_VENDORS
Constraint	FSK_SPECIFIC_VENDORS
Data Element	FSK_VENDOR (Payments by Vendor)
Model ID	FSK
Scenario	Not applicable

Definition Detail	Value
KPI Object	Vendor Includes these Vendor IDs: 1001 1002 1003 100
KPI Target Rule	Target Type = % Target Primary Target = DFLT_TRGT (Default Target Table)
Object Type (Dimension)	VENDOR
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Available Spending – Commitment Control

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_KK01
What this KPI does	This KPI will be used to show users the percentage of a budget that is available for consumption for a specified period of time.
Calculation Description	(Budgeted Amount – Spending Activity Balance)
Calculation Expression	(Budgeted Amount – Spending Activity Balance) (FSK_KK01E2 - FSK_KK01_A)
KPI Type	Calculated

Definition Detail	Value
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_KK01
KPI Calculation Rule ID	FSK_KK01
Tablemap	FSK_LED_KK
Datamap	FSK_LED_KK Referenced Table(s): LEDGER_KK_F00
Filter	FSK_KK01_EB – Expenditure Budget – Supplies (Pointer) FSK_KK01_EB2 – Expenditure Budget – Supplies (Calc Defn) FSK_KK01_EA – Expenditure Activity – Supplies
Constraint	FSK_KK01_EXP_BUD – Expenditure Budget FSK_KK01_EXP_BUD2 – Expenditure Budget FSK_KK01_EXP_ACT – Expenditure Activity
Data Element	FSK_KK01_B – Budgeted Expenditure Amount by department (Pointer) FSK_KK01E2 – Budgeted Expenditure Amount by department (Calc Defn) FSK_KK01_A – Expenditure Activity by department
Model ID	FSK
Scenario	FSK_SCENAR

Definition Detail	Value
KPI Object	Department(s): 11000 – Marketing 13000 - Finance
KPI Target Rule	Target Type: % Target Primary Target: FSK_KK01_B (Budgeted Expenditure Amount)
	<ul style="list-style-type: none"> • Rule: Available Spending >= .90 • Action: Green
	<ul style="list-style-type: none"> • Rule: Available Spending >= .76 • Action: Yellow
	<ul style="list-style-type: none"> • Rule: Available Spending < .76 • Action: Red
Object Type (Dimension)	DEPARTMENT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Available Spending – Standard Budgets

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_GL01

Definition Detail	Value
What this KPI does	This KPI will be used to show users the percentage of a budget that is available for consumption for a specified period of time.
Calculation Description	(Budgeted Amount – Spending Activity Balance)
Calculation Expression	(Budgeted Amount – Spending Activity Balance) (FSK_GL01E2 - FSK_GL01_A)
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_GL01
KPI Calculation Rule ID	FSK_GL01
Tablemap	FSK_LEDG FSK_LED_BD
Datamap	FSK_LEDG FSK_LED_BD Referenced Table(s): LEDGER2_F00 LEDGER_BUDG_F00
Filter	FSK_GL01_EB – Expenditure Budget – Supplies (Pointer) FSK_GL01_EB2 – Expenditure Budget – Supplies (Calc Defn) FSK_GL01_EA – Expenditure Activity – Supplies
Constraint	FSK_GL01_EXP_BUD – Expenditure Budget FSK_GL01_EXP_BUD2 – Expenditure Budget FSK_GL01_EXP_ACT – Expenditure Activity

Definition Detail	Value
Data Element	FSK_GL01_B – Budgeted Expenditure Amount by department (Pointer) FSK_GL01E2 – Budgeted Expenditure Amount by department (Calc Defn) FSK_GL01_A – Expenditure Activity by department
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Department(s): 11000 – Marketing 13000 - Finance
KPI Target Rule	Target Type: % Target Primary Target: FSK_GL01_B (Budgeted Expenditure Amount)
	<ul style="list-style-type: none"> • Rule: Available Spending >= .90 • Action: Green
	<ul style="list-style-type: none"> • Rule: Available Spending >= .76 • Action: Yellow
	<ul style="list-style-type: none"> • Rule: Available Spending < .76 • Action: Red
Object Type (Dimension)	DEPARTMENT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Operating Activity to Plan – Commitment Control

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_KK02
What this KPI does	This KPI will be used to show users the percentage of an operating level budget that has been consumed for a specified period of time.
Calculation Description	Operating Expenditure Activity
Calculation Expression	Operating Expenditure Activity FSK_KK02_A
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_KK02
KPI Calculation Rule ID	FSK_KK02
Tablemap	FSK_LED_KK
Datamap	FSK_LED_KK Referenced Table(s): LEDGER_KK_F00
Filter	FSK_KK02_EB – Operating Expenditure Budget FSK_KK02_EA – Operating Expenditure Activity

Definition Detail	Value
Constraint	FSK_KK02_EXP_BUD – Operating Expenditure Budget FSK_KK02_EXP_ACT – Operating Expenditure Activity
Data Element	FSK_KK02_B – Budgeted Operating Expenditure Amount FSK_KK02_A – Operating Expenditure Activity
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Operating Unit(s): NEWYORK CALIF
KPI Target Rule	Target Type: % Target Primary Target: FSK_KK02_B (Budgeted Expenditure Amount)
	<ul style="list-style-type: none"> • Rule: Percent Consumed <= .75 • Action: Green
	<ul style="list-style-type: none"> • Rule: Percent Consumed <= .90 • Action: Yellow
	<ul style="list-style-type: none"> • Rule: Percent Consumed > .90 • Action: Red
Object Type (Dimension)	OPERATING_UNIT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable

Definition Detail	Value
Critical Success Factor	Not applicable

Operating Activity to Plan – Standard Budgets

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_GL02
What this KPI does	This KPI will be used to show users the percentage of an operating level budget that has been consumed for a specified period of time.
Calculation Description	Operating Expenditure Activity
Calculation Expression	Operating Expenditure Activity FSK_GL02_A
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_GL02
KPI Calculation Rule ID	FSK_GL02
Tablemap	FSK_LEDG FSK_LED_BD
Datamap	FSK_LEDG FSK_LED_BD Referenced Table(s): LEDGER2_F00 LEDGER_BUDG_F00

Definition Detail	Value
Filter	FSK_GL02_EB – Operating Expenditure Budget FSK_GL02_EA – Operating Expenditure Activity
Constraint	FSK_GL02_EXP_BUD – Operating Expenditure Budget FSK_GL02_EXP_ACT – Operating Expenditure Activity
Data Element	FSK_GL02_B – Budgeted Operating Expenditure Amount FSK_GL02_A – Operating Expenditure Activity
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Operating Unit(s): NEWYORK CALIF
KPI Target Rule	Target Type: % Target Primary Target: FSK_GL02_B (Budgeted Expenditure Amount)
	<ul style="list-style-type: none"> Rule: Percent Consumed <= .75 Action: Green
	<ul style="list-style-type: none"> Rule: Percent Consumed <= .90 Action: Yellow
	<ul style="list-style-type: none"> Rule: Percent Consumed > .90 Action: Red
Object Type (Dimension)	OPERATING_UNIT

Definition Detail	Value
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Projected Operating Activity to Plan – Commitment Control

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_KK03
What this KPI does	This KPI will provide users with a projected view of a budget's available spending balance. The KPI will account for budgeted amounts and spending activity throughout the year and display a projected percentage of budget, that will be consumed given the current rate of spending.
Calculation Description	Operating Expenditure Activity
Calculation Expression	Operating Expenditure Activity (FSK_KK03_A / %AccountingPeriod) * %NumberOfPeriods
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_KK03
KPI Calculation Rule ID	FSK_KK03
Tablemap	FSK_LEDKKP

Definition Detail	Value
Datamap	FSK_LEDKKP Referenced Table(s): LEDGER_KK2_VW – Excludes Accounting Period
Filter	FSK_KK03_EB – Operating Expenditure Budget FSK_KK03_EA – Operating Expenditure Activity
Constraint	FSK_KK03_EXP_BUD – Operating Expenditure Budget FSK_KK03_EXP_ACT – Operating Expenditure Activity
Data Element	FSK_KK03_B – Budgeted Operating Expenditure Amount (Sum PTA across all APs) FSK_KK03_A – Operating Expenditure Activity (Sum PTA where AP < %AP)
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Operating Unit(s): NEWYORK CALIF
KPI Target Rule	Target Type: % Target Primary Target: FSK_KK03_B (Budgeted Expenditure Amount)
	<ul style="list-style-type: none"> Rule: Projected Pct Consumed <= .80 Action: Green
	<ul style="list-style-type: none"> Rule: Projected Pct Consumed <= .95 Action: Yellow

Definition Detail	Value
	<ul style="list-style-type: none"> • Rule: Projected Pct Consumed > .95 • Action: Red
Object Type (Dimension)	OPERATING_UNIT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Projected Operating Activity to Plan – Standard Budgets

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_GL03
What this KPI does	This KPI will provide users with a projected view of a budget's available spending balance. The KPI will account for budgeted amounts and spending activity throughout the year and display a projected percentage of budget, that will be consumed given the current rate of spending.
Calculation Description	Operating Expenditure Activity
Calculation Expression	Operating Expenditure Activity (FSK_GL03_A / %AccountingPeriod) * %NumberOfPeriods
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements

Definition Detail	Value
Calculation Definition (Calculation ID)	FSK_GL03
KPI Calculation Rule ID	FSK_GL03
Tablemap	FSK_LEDG_P FSK_LEDBDP
Datamap	FSK_LEDG_P FSK_LEDBDP Referenced Table(s): LEDGER_GL2_VW – Excludes Accounting Period LEDGER_BUDG2_VW – Excludes Accounting Period
Filter	FSK_GL03_EB – Operating Expenditure Budget FSK_GL03_EA – Operating Expenditure Activity
Constraint	FSK_GL03_EXP_BUD – Operating Expenditure Budget FSK_GL03_EXP_ACT – Operating Expenditure Activity
Data Element	FSK_GL03_B – Budgeted Operating Expenditure Amount (Sum PTA across all APs) FSK_GL03_A – Operating Expenditure Activity (Sum PTA where AP < %AP)
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Operating Unit(s): NEWYORK CALIF
KPI Target Rule	Target Type: % Target Primary Target: FSK_GL03_B (Budgeted Expenditure Amount)

Definition Detail	Value
	<ul style="list-style-type: none"> Rule: Projected Pct Consumed <= .80 Action: Green
	<ul style="list-style-type: none"> Rule: Projected Pct Consumed <= .95 Action: Yellow
	<ul style="list-style-type: none"> Rule: Projected Pct Consumed > .95 Action: Red
Object Type (Dimension)	OPERATING_UNIT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Project Gross Profit to Plan – Commitment Control

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_KK04
What this KPI does	This KPI will be used to show users the budgeted gross profit as compared to the actual gross profit for a specified project and period of time.
Calculation Description	(Recognized Project Revenue Activity - Project Expenditure Activity)
Calculation Expression	(Recognized Project Revenue Activity - Project Expenditure Activity) (%NegativeOne * FSK_GL04RA) - FSK_GL04EA

Definition Detail	Value
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_KK04
KPI Calculation Rule ID	FSK_KK04
Tablemap	FSK_LED_KK
Datamap	FSK_LED_KK Referenced Table(s): LEDGER_KK_F00
Filter	FSK_KK04_RA – Recognized Project Revenue Activity FSK_KK04_EA – Project Expenditure Activity
Constraint	FSK_KK04_REV_AC – Recognized Project Revenue Activity FSK_KK04_EXP_AC – Project Expenditure Activity
Data Element	FSK_KK04RA – Recognized Project Revenue Activity FSK_KK04EA – Project Expenditure Activity
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Project ID(s): FACTORY PLANT

Definition Detail	Value
KPI Target Rule	Target Type: % Target Primary Target: Default Target Table
	<ul style="list-style-type: none"> Rule: Actual Gross Profit >= .90 Action: Green
	<ul style="list-style-type: none"> Rule: Actual Gross Profit >= .76 Action: Yellow
	<ul style="list-style-type: none"> Rule: Actual Gross Profit < .76 Action: Red
Object Type (Dimension)	PROJECT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Project Gross Profit to Plan – Standard Budgets

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_GL04
What this KPI does	This KPI will be used to show users the budgeted gross profit as compared to the actual gross profit for a specified project and period of time.
Calculation Description	(Recognized Project Revenue Activity - Project Expenditure Activity)

Definition Detail	Value
Calculation Expression	(Recognized Project Revenue Activity - Project Expenditure Activity) (%NegativeOne * FSK_GL04RA) - FSK_GL04EA
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_GL04
KPI Calculation Rule ID	FSK_GL04
Tablemap	FSK_LEDG
Datamap	FSK_LEDG Referenced Table(s): LEDGER2_F00
Filter	FSK_GL04_RA – Recognized Project Revenue Activity FSK_GL04_EA – Project Expenditure Activity
Constraint	FSK_GL04_REV_AC – Recognized Project Revenue Activity FSK_GL04_EXP_AC – Project Expenditure Activity
Data Element	FSK_GL04RA – Recognized Project Revenue Activity FSK_GL04EA – Project Expenditure Activity
Model ID	FSK
Scenario	FSK_SCENAR

Definition Detail	Value
KPI Object	Project ID(s): FACTORY PLANT
KPI Target Rule	Target Type: % Target Primary Target: Default Target Table
	<ul style="list-style-type: none"> • Rule: Actual Gross Profit >= .90 • Action: Green
	<ul style="list-style-type: none"> • Rule: Actual Gross Profit >= .76 • Action: Yellow
	<ul style="list-style-type: none"> • Rule: Actual Gross Profit < .76 • Action: Red
Object Type (Dimension)	PROJECT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Gross Margin to Plan – Commitment Control

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_KK05
What this KPI does	This KPI will be used to show users the budgeted gross profit margin as compared to the actual gross profit margin for a specified product and period of time.

Definition Detail	Value
Calculation Description	Product Revenue Amount - Product Expenditure Activity / Product Revenue Amount
Calculation Expression	Product Revenue Amount - Product Expenditure Activity / Product Revenue Amount $(((\%NegativeOne * FSK_KK05RA) - FSK_KK05EA) / (\%NegativeOne * FSK_KK05RA)) * 100$
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_ KK05
KPI Calculation Rule ID	FSK_ KK05
Tablemap	FSK_LED_KK
Datamap	FSK_LED_KK Referenced Table(s): LEDGER_KK_F00
Filter	FSK_KK05_RA – Recognized Product Revenue Activity FSK_KK05_EA – Product Expenditure Activity
Constraint	FSK_KK05_REV_AC – Recognized Product Revenue Activity FSK_KK05_EXP_AC – Product Expenditure Activity
Data Element	FSK_KK05RA – Recognized Product Revenue Activity FSK_KK05EA – Product Expenditure Activity
Model ID	FSK

Definition Detail	Value
Scenario	FSK_SCENAR
KPI Object	Product(s): PRNTRS SERVRS
KPI Target Rule	Target Type: % Target Primary Target: Default Target Table
	<ul style="list-style-type: none"> • Rule: Actual Gross Profit >= .90 • Action: Green
	<ul style="list-style-type: none"> • Rule: Actual Gross Profit >= .76 • Action: Yellow
	<ul style="list-style-type: none"> • Rule: Actual Gross Profit < .76 • Action: Red
Object Type (Dimension)	PRODUCT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Gross Margin to Plan – Standard Budgets

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_GL05

Definition Detail	Value
What this KPI does	This KPI will be used to show users the budgeted gross profit margin as compared to the actual gross profit margin for a specified product and period of time.
Calculation Description	Product Revenue Amount - Product Expenditure Activity / Product Revenue Amount
Calculation Expression	Product Revenue Amount - Product Expenditure Activity / Product Revenue Amount $(((\%NegativeOne * FSK_GL05RA) - FSK_GL05EA) / (\%NegativeOne * FSK_GL05RA)) * 100$
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_ GL05
KPI Calculation Rule ID	FSK_ GL05
Tablemap	FSK_LED_GL
Datamap	FSK_LED_GL Referenced Table(s): LEDGER_GL_F00
Filter	FSK_GL05_RA – Recognized Product Revenue Activity FSK_GL05_EA – Product Expenditure Activity
Constraint	FSK_GL05_REV_AC – Recognized Product Revenue Activity FSK_GL05_EXP_AC – Product Expenditure Activity
Data Element	FSK_GL05RA – Recognized Product Revenue Activity FSK_GL05EA – Product Expenditure Activity

Definition Detail	Value
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Product(s): PRNTRS SERVRS
KPI Target Rule	Target Type: % Target Primary Target: Default Target Table
	<ul style="list-style-type: none"> • Rule: Actual Gross Profit >= .90 • Action: Green
	<ul style="list-style-type: none"> • Rule: Actual Gross Profit >= .76 • Action: Yellow
	<ul style="list-style-type: none"> • Rule: Actual Gross Profit < .76 • Action: Red
Object Type (Dimension)	PRODUCT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Capital Expenditure Activity to Plan – Commitment Control

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_KK06
What this KPI does	This KPI will be used to show users the percentage of a capital expenditure budget that has been consumed for a specified period of time.
Calculation Description	FSK_KK06 – Capital Expenditure Activity to Plan
Calculation Expression	FSK_KK06 – Capital Expenditure Activity to Plan FSK_KK06_A
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_ KK06
KPI Calculation Rule ID	FSK_ KK06
Tablemap	FSK_LED_KK
Datamap	FSK_LED_KK Referenced Table(s): LEDGER_KK_F00
Filter	FSK_KK06_EB – Capital Expenditure Budget FSK_KK06_EA – Capital Expenditure Activity
Constraint	FSK_KK06_EXP_BUD – Capital Expenditure Budget FSK_KK06_EXP_ACT – Capital Expenditure Activity
Data Element	FSK_KK06_B –Budgeted Capital Expenditure Amount FSK_KK06_A – Capital Expenditure Activity

Definition Detail	Value
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Project(s): FACTORY PLANT
KPI Target Rule	Target Type: % Target Primary Target: FSK_KK06_B (Budgeted Capital Expenditure Amount)
	<ul style="list-style-type: none"> • Rule: Percent Consumed <= .75 • Action: Green
	<ul style="list-style-type: none"> • Rule: Percent Consumed <= .90 • Action: Yellow
	<ul style="list-style-type: none"> • Rule: Percent Consumed > .90 • Action: Red
Object Type (Dimension)	PROJECT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Capital Expenditure Activity to Plan – Standard Budgets

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_GL06
What this KPI does	This KPI will be used to show users the percentage of a capital expenditure budget that has been consumed for a specified period of time.
Calculation Description	FSK_GL06 – Capital Expenditure Activity to Plan
Calculation Expression	FSK_GL06 – Capital Expenditure Activity to Plan FSK_GL06_A
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_ GL06
KPI Calculation Rule ID	FSK_ GL06
Tablemap	FSK_LEDG FSK_LED_BD
Datamap	FSK_LEDG FSK_LED_BD Referenced Table(s): LEDGER2_F00 LEDGER_BUDG_F00
Filter	FSK_GL06_EB – Capital Expenditure Budget FSK_GL06_EA – Capital Expenditure Activity
Constraint	FSK_GL06_EXP_BUD – Capital Expenditure Budget FSK_GL06_EXP_ACT – Capital Expenditure Activity

Definition Detail	Value
Data Element	FSK_GL06_B –Budgeted Capital Expenditure Amount FSK_GL06_A – Capital Expenditure Activity
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Project(s): FACTORY PLANT
KPI Target Rule	Target Type: % Target Primary Target: FSK_GL06_B (Budgeted Capital Expenditure Amount)
	<ul style="list-style-type: none"> • Rule: Percent Consumed <= .75 • Action: Green
	<ul style="list-style-type: none"> • Rule: Percent Consumed <= .90 • Action: Yellow
	<ul style="list-style-type: none"> • Rule: Percent Consumed > .90 • Action: Red
Object Type (Dimension)	PROJECT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Projected Capital Expenditure Activity to Plan – Commitment Control

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_KK07
What this KPI does	This KPI will provide users with a projected view of a capital budget's available spending balance. The KPI will account for budgeted amounts and spending activity throughout the year and display a projected percentage of budget, that will be consumed given the current rate of spending.
Calculation Description	(Capital Expenditure Activity / Current Accounting Period) * Number Of Accounting Periods in the fiscal year
Calculation Expression	(Capital Expenditure Activity / Current Accounting Period) * Number Of Accounting Periods in the fiscal year (FSK_KK07_A / %AccountingPeriod) * %NumberOfPeriods
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_ KK07
KPI Calculation Rule ID	FSK_ KK07
Tablemap	FSK_LEDKKP
Datamap	FSK_LEDKKP Referenced Table(s): LEDGER_KK_VW – Excludes Accounting Period
Filter	FSK_KK07_EB – Capital Expenditure Budget FSK_KK07_EA – Capital Expenditure Activity

Definition Detail	Value
Constraint	FSK_KK07_EXP_BUD – Capital Expenditure Budget FSK_KK07_EXP_ACT – Capital Expenditure Activity
Data Element	FSK_KK07_B – Budgeted Capital Exp Amount (Sum PTA across all APs) FSK_KK07_A – Capital Expenditure Activity (Sum PTA where AP < %AP)
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Project(s): FACTORY PLANT
KPI Target Rule	Target Type: % Target Primary Target: FSK_KK07_B (Budgeted Capital Expenditure Amount)
	<ul style="list-style-type: none"> Rule: Projected Pct Consumed <= .80 Action: Green
	<ul style="list-style-type: none"> Rule: Projected Pct Consumed <= .95 Action: Yellow
	<ul style="list-style-type: none"> Rule: Projected Pct Consumed > .95 Action: Red
Object Type (Dimension)	PROJECT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable

Definition Detail	Value
Critical Success Factor	Not applicable

Projected Capital Expenditure Activity to Plan – Standard Budgets

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_GL07
What this KPI does	This KPI will provide users with a projected view of a capital budget's available spending balance. The KPI will account for budgeted amounts and spending activity throughout the year and display a projected percentage of budget, that will be consumed given the current rate of spending.
Calculation Description	(Capital Expenditure Activity / Current Accounting Period) * Number Of Accounting Periods in the fiscal year
Calculation Expression	(Capital Expenditure Activity / Current Accounting Period) * Number Of Accounting Periods in the fiscal year (FSK_GL07_A / %AccountingPeriod) * %NumberOfPeriods
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_ GL07
KPI Calculation Rule ID	FSK_ GL07
Tablemap	FSK_LEDG_P FSK_LEDBDP

Definition Detail	Value
Datamap	FSK_LEDG_P FSK_LEDBDP Referenced Table(s): LEDGER2_VW – Excludes Accounting Period
Filter	FSK_GL07_EB – Capital Expenditure Budget FSK_GL07_EA – Capital Expenditure Activity
Constraint	FSK_GL07_EXP_BUD – Capital Expenditure Budget FSK_GL07_EXP_ACT – Capital Expenditure Activity
Data Element	FSK_GL07_B – Budgeted Capital Exp Amount (Sum PTA across all APs) FSK_GL07_A – Capital Expenditure Activity (Sum PTA where AP < %AP)
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Project(s): FACTORY PLANT
KPI Target Rule	Target Type: % Target Primary Target: FSK_GL07_B (Budgeted Capital Expenditure Amount)
	<ul style="list-style-type: none"> Rule: Projected Pct Consumed <= .80 Action: Green
	<ul style="list-style-type: none"> Rule: Projected Pct Consumed <= .95 Action: Yellow

Definition Detail	Value
	<ul style="list-style-type: none"> • Rule: Projected Pct Consumed > .95 • Action: Red
Object Type (Dimension)	PROJECT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Recognized Revenue to Plan – Commitment Control

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_KK08
What this KPI does	This KPI will be used to show users the percentage of product revenue budget that has been recognized for a specified period of time.
Calculation Description	FSK_KK08 – Recognized Revenue to Plan
Calculation Expression	(%NegativeOne * FSK_KK08_A)
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_ KK08
KPI Calculation Rule ID	FSK_ KK08

Definition Detail	Value
Tablemap	FSK_LED_KK
Datamap	FSK_LED_KK Referenced Table(s): LEDGER_KK_F00
Filter	FSK_KK08_RB – Budgeted Product Revenue FSK_KK08_RA – Recognized Product Revenue Activity
Constraint	FSK_KK08_REV_BUD – Budgeted Product Revenue FSK_KK08_REV_ACT – Recognized Product Revenue Activity
Data Element	FSK_KK08_B – Budgeted Product Revenue Amount (Pointer) FSK_KK08_A – Recognized Product Revenue Activity
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Product(s) :SERVRS PRNTRS
KPI Target Rule	Target Type: % Target Primary Target: FSK_KK08_B (Budgeted Product Revenue Amount)
	<ul style="list-style-type: none"> • Rule: Percent Recognized >= .90 • Action: Green
	<ul style="list-style-type: none"> • Rule: Percent Recognized >= .76 • Action: Yellow

Definition Detail	Value
	<ul style="list-style-type: none"> • Rule: Percent Recognized < .76 • Action: Red
Object Type (Dimension)	PRODUCT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Recognized Revenue to Plan – Standard Budgets

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_GL08
What this KPI does	This KPI will be used to show users the percentage of product revenue budget that has been recognized for a specified period of time.
Calculation Description	FSK_GL08 – Recognized Revenue to Plan
Calculation Expression	(%NegativeOne * FSK_GL08_A)
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_ GL08
KPI Calculation Rule ID	FSK_ GL08

Definition Detail	Value
Tablemap	FSK_LEDG FSK_LED_BD
Datamap	FSK_LEDG FSK_LED_BD Referenced Table(s): LEDGER2_F00 LEDGER_BUDG_F00
Filter	FSK_GL08_RB – Budgeted Product Revenue FSK_GL08_RA – Recognized Product Revenue Activity
Constraint	FSK_GL08_REV_BUD – Budgeted Product Revenue FSK_GL08_REV_ACT – Recognized Product Revenue Activity
Data Element	FSK_GL08_B – Budgeted Product Revenue Amount (Pointer) FSK_GL08_A – Recognized Product Revenue Activity
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Product(s): SERVRS PRNTRS
KPI Target Rule	Target Type: % Target Primary Target: FSK_GL08_B (Budgeted Product Revenue Amount)
	<ul style="list-style-type: none"> • Rule: Percent Recognized >= .90 • Action: Green

Definition Detail	Value
	<ul style="list-style-type: none"> • Rule: Percent Recognized >= .76 • Action: Yellow
	<ul style="list-style-type: none"> • Rule: Percent Recognized < .76 • Action: Red
Object Type (Dimension)	PRODUCT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Payroll to Target – Standard Budgets

This section discusses the KPI definition detail:

Definition Detail	Value
KPI Definition (KPI ID)	FSK_GL09
What this KPI does	This KPI shows the percentage of a payroll budget that has been consumed for a specified period of time. Obtains and displays results based on standard budgets from the actuals and standard budget ledgers (for example, LEDGER and LEDGER_BUDG).
Calculation Description	FSK_GL09 – Payroll Expenditure Activity to Plan Payroll Expenditure Activity / Budgeted Payroll Expenditure Amount
Calculation Expression	Payroll Expenditure Activity / Budgeted Payroll Expenditure Amount (FSK_GL09_A / FSK_GL09_B)
KPI Type	Calculated

Definition Detail	Value
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_GL09
KPI Calculation Rule ID	FSK_GL09
Tablemap	FSK_LEDG FSK_LED_BD
Datamap	FSK_LEDG FSK_LED_BD Referenced Tables: LEDGER_GL_VW LEDGER_BUDG_VW
Filter	FSK_GL09_EB FSK_GL09_EA
Constraint	FSK_GL09_EXP_BUD FSK_GL09_EXP_ACT
Data Element	FSK_GL09_B FSK_GL09_A
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Business Unit: CORP1
KPI Target Rule	Target Type = % Target Primary Target = FSK_GL09_B (Budgeted Payroll Expenditure Amount)

<i>Definition Detail</i>	<i>Value</i>
	Percent Consumed <= .75 Green
	Percent Consumed <= .90 Yellow
	Percent Consumed > .90 Red
Object Type (Dimension)	Business Unit
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Note. This KPI is calculated on quarterly periods while the underlying source table has monthly period data. The view PS_LEDGER_F00_VW2, used in the Tablemap and Datamap, handles the mapping from the detail ledger period to the quarterly period.

Payroll to Target – Commitment Control

This section discusses the KPI definition detail:

<i>Definition Detail</i>	<i>Value</i>
KPI Definition (KPI ID)	FSK_KK09
What this KPI does	This KPI shows the percentage of a payroll budget that has been consumed for a specified period of time. Obtains and displays results based on data from the commitment control ledger (for example, LEDGER_KK).
Calculation Description	FSK_KK09 – Payroll Expenditure Activity to Plan Payroll Expenditure Activity / Budgeted Payroll Expenditure Amount
Calculation Expression	Payroll Expenditure Activity / Budgeted Payroll Expenditure Amount (FSK_KK09_A / FSK_KK09_B)

Definition Detail	Value
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_KK09
KPI Calculation Rule ID	FSK_KK09
Tablemap	FSK_LED_KK
Datamap	FSK_LED_KK Referenced Tables: LEDGER_KK_VW
Filter	FSK_KK09_EB FSK_KK09_EA
Constraint	FSK_KK09_EXP_BUD FSK_KK09_EXP_ACT
Data Element	FSK_KK09_B FSK_KK09_A
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Business Unit: CORP1
KPI Target Rule	Actual Value Payroll Expenditure Activity

<i>Definition Detail</i>	<i>Value</i>
	Current Target Budgeted Payroll Expenditure Amount
	% of Target Percentage Consumed
Object Type (Dimension)	Business Unit
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

Note. This KPI is calculated on quarterly periods while the underlying source table has monthly period data. The view PS_LEDGER_F00_VW2, used in the tablemap and datamap, handles the mapping from the detail ledger period to the quarterly period.

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