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# PeopleSoft EPM 9.1 Scorecard Reports

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**April 2012**

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# PeopleSoft Scorecard Reports: A to Z

This appendix provides an overview of PeopleSoft Scorecard reports and enables you to view a summary table of all reports.

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**Note.** For samples of these reports, see the Portable Document Format (PDF) files that are published with your online documentation.

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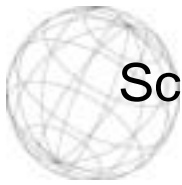
## PeopleSoft Scorecard Reports: A to Z

This table lists the PeopleSoft Scorecard reports, sorted alphanumerically by report ID. These reports are all Crystal reports.

Report ID and Report Name	Description	Navigation	Run Control Page
BSC0001 Scorecards by Strategy Tree	Lists scorecards by strategy tree.	Scorecards, Define Scorecards, Reports, Scorecards by Strategy Tree	RUN_RBS_0001
BSC0002 Scorecards by KPI	Lists scorecards associated with the specified KPI.	Scorecards, Define Scorecards, Reports, Scorecards by KPI	RUN_RBS_0002
BSC0003 Scorecards by Assessment Group	Lists scorecards for the specified assessment group.	Scorecards, Define Scorecards, Reports, Scorecards by Assessment Group	RUN_RBS_0003
BSC0004 Strategy Trees w/ Non-Terminal KPIs	Lists KPIs assigned to components that aren't at the end of a tree branch for the specified tree.	Scorecards, Define Scorecards, Reports, Strat Trees w/ Non-Term KPI	RUN_RBS_0004
BSC0005 Strategy Components by Strategic Initiatives	Lists the strategy components associated with a strategic initiative.	Scorecards, Define Scorecards, Reports, Strat Component by Strat Init	RUN_RBS_0005
BSC0006 KPI by Strategic Initiative	Lists all KPIs by strategic initiative.	Key Performance Indicators, Define KPIs, Reports, KPI by Strategic Initiative	RUN_RBS_0006
BSC0007 KPI and Calculations by Model	Lists KPIs by model ID.	Key Performance Indicators, Define KPIs, Reports, KPI and Calc by Model	RUN_RBS_0007
BSC0008 Key Performance Indicators, Target Rules, and Actions by Model ID	Lists target rules and actions for KPI objects by model.	Key Performance Indicators, Define KPIs, Reports, KPI, Target Rules by Model	RUN_RBS_0008

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
BSC0009 Strategy Components by Perspective	Lists the strategy components for a setID categorized by perspective.	Scorecards, Define Scorecards, Reports, Strat Component by Perspective	RUN_RBS_0009
BSC0010 KPI by Perspective	Lists all the KPIs by setID for the specified perspectives.	Key Performance Indicators, Define KPIs, Reports, KPI by Perspective	RUN_RBS_0010
BSC0011 Strategy Components by KPI	Lists the strategy components associated with the specified KPI by setID.	Scorecards, Define Scorecards, Reports, Strat Component by KPI	RUN_RBS_0011
BSC0012 Strategy Trees with Duplicate KPIs	Lists duplicate KPIs by setID and strategy tree.	Scorecards, Define Scorecards, Reports, Strategy Tree w/ Dup KPI	RUN_RBS_0012
BSC0013 Scorecard Assessment	Lists assessment results for scorecard components by fiscal year, accounting period, and scorecard ID for the specified business unit and scenario.	Scorecards, Define Scorecards, Reports, Scorecard Assessment	RUN_RBS_0013
BSC0014 KPI Detail	Lists the history of assessment results for KPI objects.	Key Performance Indicators, Define KPIs, Reports, KPI Detail	RUN_RBS_0014
BSC0015 KPI Target Rule Values	Lists the target types, rules, and target values for each KPI object by business unit.	Key Performance Indicators, Define KPIs, Reports, KPI Target Rule Values	RUN_RBS_0015
BSC0016 KPI Data Element Values	Lists data elements and their associated objects' values by business unit.	Key Performance Indicators, Define KPIs, Reports, KPI Data Element Values	RUN_RBS_0016

# Report Samples



# Scorecards by Strategy Tree



Set ID: SHARE

Tree Name: COMPANY\_STRATEGY

Effective Date: 1/1/1999

Business Unit	Balance Scorecard ID	Effective Date	Status	Description	Owner	Employee ID
CONSL	CORPORATE	1/1/1990	A	Corporate Scorecard	W0006 Fields,Julia	W0006 Fields,Julia
CORP1	COMPANY1	1/1/1990	A	Company 1 Scorecard	W0006 Fields,Julia	W0006 Fields,Julia
CORP2	COMPANY2	1/1/1990	A	Company 2 Scorecard	W0006 Fields,Julia	W0006 Fields,Julia





# Scorecards by Key Performance Indicator



Set ID: SHARE

Effective Date: 1/1/1999

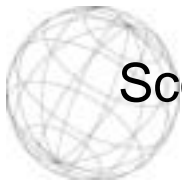
Status: Active

KPI ID: COSTSALE

Owner ID: W0007

Owner Name: Guzic,Robert R.

Business Unit	Component	Balance Scorecard ID	Effective Date	Status	Tree	Owner ID	Employee ID
CONSL	CSF2	CORPORATE	1/1/1990	Active	COMPANY_STRATEGY	W0006	W0006
	Improve Efficiency	Corporate Scorecard				Fields,Julia	Fields,Julia
CORP1	CSF2	COMPANY	1/1/1990	Active	COMPANY_STRATEGY	W0006	W0006
	Improve Efficiency	Company Scorecard				Fields,Julia	Fields,Julia
CORP1	CSF2	COMPANY	1/1/1999	Active	COMPANY_STRATEGY	W0006	W0006
	Improve Efficiency	Company Scorecard				Fields,Julia	Fields,Julia
CORP1	CSF2	COMPANY1	1/1/1990	Active	COMPANY_STRATEGY	W0006	W0006
	Improve Efficiency	Company 1 Scorecard				Fields,Julia	Fields,Julia
CORP2	CSF2	COMPANY2	1/1/1990	Active	COMPANY_STRATEGY	W0006	W0006
	Improve Efficiency	Company 2 Scorecard				Fields,Julia	Fields,Julia



# Scorecards by Assessment Group



Set ID: SHARE  
Group ID: ALLBUS

Effective Date: 1/1/1990  
Status: Active

Object Type: 2100  
Description: All Business Units

Business Unit	Balance Scorecard ID	Effective Date	Description	Tree Name	BSC Owner	BSC Employee ID
CORP1	FIELDS	1/1/1999	Fields' Scorecard	CORP_STRATEGY	W0001 Adams,Richard	W0006 Fields,Julia
CORP1	GUZIC	1/1/1999	Guzic's Scorecard	DEPT_STRATEGY	W0004 Dobbs,Janet	W0007 Guzic,Robert R.



# Strategy Trees with Non-Terminal Node KPIs



Set ID: SHARE

Tree Name: COMPANY STRATEGY

Effective Date: 1/1/1999

Tree Node	KPI ID	Descripton
Node 1	New Prod	New Products



# Strategy Components by Strategic Initiative



Set ID: SHARE

Owner ID: 8003

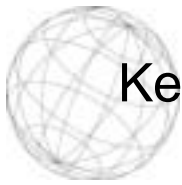
Name: McGrath,Lidia

Strategic Initiative ID S100

Description Way to Win Employee Awareness

Project ID: 1000

Component ID	Component Type	Owner ID	Name
CSF_F	CSF	W0004	Dobbs,Janet
ST_B	Thrust	W0004	Dobbs,Janet
ST_C	Thrust	W0004	Dobbs,Janet



# Key Performance Indicators by Strategic Initiative



Set ID: SHARE

Effective Date: 1/1/1999

Strategic Initiative ID: S100

Owner ID: 8003

Project ID: 1000

Description: Way to Win Employee Awareness

Name: McGrath,Lidia

KPI ID	Description	Owner ID	Name
NUMNWPRODS	# New Products Launched	W0004	Dobbs,Janet



# Performance Indicators and Calculations by Model ID

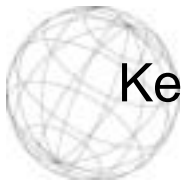


Set ID: SHARE

Model ID: PROD1

Description: Primary Production Model

KPI ID	Owner ID	Calculation ID	Calculation Expression
BASE_PAY Employee Base Pay	W0009 Inman,Lisa	BASE_PAY Base Pay	HRS_WRKED * HRLY_RTE Hours Worked * Comp Rate
PCTINCPROD Percent of Increase by Product	W0006 Fields,Julia	PCTINCPROD Percent of Increase - Sales	$\gg(\ll ( \text{TSALSPRD} - \text{LSTPRSALES} ) / \text{LSTPRSALES} ) * 100$ ( Current Sales by Product - Last Periods Sales by Product ) divided by Last Periods Sales by Product multiplied by 100.
PCTTRNMGRS Percent of Trained Managers	W0003 Castillo,Alex	PCTTRNMGRS Percent of Trained Managers	$\gg(\ll \text{NUMMGRTRN} / \text{NUMMGREMP} ) * 100$ The Number of Employees in Management Positions divided by the Number of those employees who have completed the training course multiplied by 100.
S100 Average Sale by Customer	W0009 Inman,Lisa	SALES Average Sale by Customer	AVG ( DE2 )
TRAIN1 Average Sale by Channel	W0009 Inman,Lisa	TRAINCALC All Revenue by Channel	REVENUE
TSTKP12 Cost of Customer Calls	W0009 Inman,Lisa	TSTKP12 Cost of Customer Calls	DE2 / DE1 Customers Sales divided by the number of customer calls.
TSTKP22 YTD Cost of Customer Calls	W0009 Inman,Lisa	TSTKP12 Cost of Customer Calls	DE2 / DE1 Customers Sales divided by the number of customer calls.
TSTKPI5 Uses TSTKPI521 & TSTKPI55	W0009 Inman,Lisa	TSTKPI5 Test KPI5	TSTKPI521 / TSTKPI55 KPI TSTKPI521 divided by KPI TSTKPI55



# Key Performance Indicators, Target Rules and Actions by Model ID



SetID: SHARE

Model ID: PROD1

KPI ID	Description	Owner ID	Name	Object ID	Target Rule Type
--------	-------------	----------	------	-----------	------------------

BASE_PAY	Employee Base Pay	W0009	Inman,Lisa	8001	Balanced Scorecard
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Sequence#	Operator	Target ID#	Target Num#	Percent Num#	Assess ID	Action ID	Description
-----------	----------	------------	-------------	--------------	-----------	-----------	-------------

10	<	ANUAL_SAL			 RED		
----	---	-----------	--	--	---	--	--

20	<>	HRLY_RTE			 GREEN		
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30	<=	HRS_WRKED			 YELLOW		
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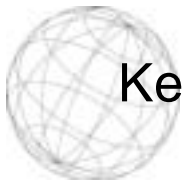
# Strategy Components by Perspective



Perspective Type: Customer Perspective

Set ID	Component ID	Description	Component Type	Owner ID	Name
SHARE	CSF4	Assess Customer Profitability	Critical Success Factor	W0006	Fields,Julia
	CSF5	Enhance Customer Satisfaction	Critical Success Factor	W0006	Fields,Julia
	CSF_B	Enhance Customer Satisfaction	Critical Success Factor	W0004	Dobbs,Janet
	CSF_B2	Improve Customer Mkting & Dist	Critical Success Factor	W0004	Dobbs,Janet
	ST2	Improve Customer Satisfaction	Strategic Thrust	W0006	Fields,Julia





# Key Performance Indicators by Perspective



Perspective Type: Customer Perspective

Set ID	KPI ID	Description	Owner ID	Name
SHARE	COSTSALE	Cost of Sales Ratio	W0006	Fields,Julia
SHARE	CUSTSAT	Customer Satisfaction	W0006	Fields,Julia
SHARE	OTD	On Time Delivery	W0006	Fields,Julia
SHARE	OTD	On Time Delivery	W0004	Dobbs,Janet



# Strategy Components by Key Performance Indicator



Set ID: SHARE

KPI ID: COSTSALE

Description: Cost of Sales Ratio

Component ID	Component Type	Owner ID	Name
CSF2	Critical Success Factor	W0006	Fields,Julia



# Strategy Trees with Duplicate KPIs

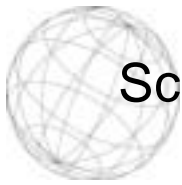


Set ID: SHARE

Tree Name: COMPANY\_STRATEGY

Effective Date: 1/1/1999

KPI ID	Description	Component ID	Description
COSTSALE	Cost of Sales Ratio	CSF2	Improve Efficiency
CUSTSAT	Customer Satisfaction	CSF5	Enhance Customer Satisfaction
GRWTHDISTR	Growth in # of Distr. of Prod.	CSF1	Improve Financial Returns
NUMNWDVLP	# New Products in Development	CSF8	Reduce Infastructure
NUMNWPRODS	# New Products Launched	CSF8	Reduce Infastructure
OTD	On Time Delivery	CSF5	Enhance Customer Satisfaction
PCTSALESNW	% Sales of New Product Categ.	CSF1	Improve Financial Returns
PCTTRNMGRS	Percent of Trained Managers	CSF9	Improve Employee Effectivness
PCTTRNOVR	Percent of Turnover	CSF10	Stabilize Workforce
PLANTCNSLD	Plant Consolidations Completed	CSF7	Deliver Integrated Supp Slns
TIMEMKTNP	Time to Market for New Product	CSF6	Accelerate New Product Dev
TSALES	Total Sales by Product -- Demo	CSF3	Broaden Revenue Mix
TSALESBU	Total Sales by Business Unit	CSF4	Assess Customer Profitability



# Scorecard Assessment



Business Unit CORP1

BSC ID: COMPANY

Scenario ID ACTUAL01

Fiscal Year 1998

Accounting Period: 1

Component ID	Description	Component Type	Object ID	Assess ID	% of Target	Override ID
VISION	Corporate Vision	Vision		UNKNOWN		No
ST1	Improve Profitability	Strategic Thrust		UNKNOWN		No
ST2	Improve Customer Satisfaction	Strategic Thrust		UNKNOWN		No
ST3	Improve Internal Processes	Strategic Thrust		UNKNOWN		No
ST4	Improve Employee Involvement	Strategic Thrust		GREEN		No
CSF1	Improve Financial Returns	Critical Success Factor		UNKNOWN		No
CSF10	Stabilize Workforce	Critical Success Factor		GREEN		No
CSF2	Improve Efficiency	Critical Success Factor		GREEN		No
CSF3	Broaden Revenue Mix	Critical Success Factor		YELLOW		No
CSF5	Enhance Customer Satisfaction	Critical Success Factor		UNKNOWN		No
CSF6	Accelerate New Product Dev	Critical Success Factor		GREEN		No
CSF7	Deliver Integrated Supp Slns	Critical Success Factor		UNKNOWN		No
CSF8	Reduce Infastructure	Critical Success Factor		GREEN		No
CSF9	Improve Employee Effectivness	Critical Success Factor		GREEN		No
COSTSALE	Cost of Sales Ratio	KPI	CORP1	GREEN	85.71	No
CUSTSAT	Customer Satisfaction	KPI	CH400	GREEN	90.00	No



## KPI Detail



Business Unit: CORP1


Scenario ID: ACTUAL01

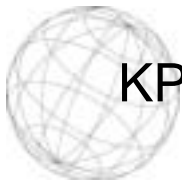
Fiscal Year: 1998

Accounting Period: 1

KPI ID: COSTSALE

Description: Cost of Sales Ratio

Object ID	Assessment	Value	% of Target	Current Target	Assessment Override Ind	Calc Date Time	Assessment Date Time
CORP1	 GREEN	12.00	85.71	14.00	No	11/07/1999 18:51:25	01/07/2000 11:23:48

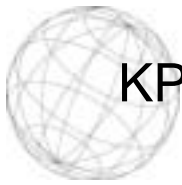


# KPI Target Rule Values



Business Unit: CORP1      Scenario ID: ACTUAL01      Fiscal year: 1999      Accounting Period: 1  
KPI ID: GRWTHDISTR      Object ID: CH400

Target Type	Default Target Table	Primary Target ID	Primary Target Value	Sequence	Operator	Target ID	Target Value	Assessment
Percent of Target	Yes	DFLT_TRGT	32.00	10	<	DFLT_TRGT	32.00	RED
				20	<	DFLT_TRGT	32.00	YELLOW
				30	>	DFLT_TRGT	32.00	GREEN



# KPI Data Element Values



Business Unit: CORP1

Scenario ID: ACTUAL01

Fiscal year: 1999

Accounting Period: 1

DATA ELEMENT ID	DESCRIPTION	OBJ TYPE	OBJ ID	VALUE
HRLY_RTE	Employee's Hourly Rate	Employee ID	8001	70.47
			8002	16.17
			8003	12.59
			8004	21.38
			8005	19.60
			8200	74.25
			E1	24.00
			E2	21.00
			E3	29.00
			E4	36.00
			E5	24.00
			W0001	70.47
			W0002	54.66
			W0003	40.47
			W0004	30.74
			W0005	27.71
			W0006	17.75