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PeopleSoft EPM 9.1 Activity-Based Management Reports

April 2012

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Activity-Based Management Reports

PeopleSoft EPM applications provide numerous options for accessing your business intelligence. As with all PeopleSoft applications, you have access to all of the reporting tools delivered with PeopleTools: PS/nVision and PeopleSoft Query. Although we do not deliver reports developed in each of these tools, you have full use of the tools.

This appendix provides a listing of the Crystal reports delivered with Activity-Based Management.

Note. For samples of these reports, see the PDF files that are published with your online documentation.

Activity-Based Management Reports: A to Z

This table lists the Activity-Based Management reports.

Report ID and Report Name	Description	Navigation	Run Control Page
ABC2005 Activity Listing	Lists the activities according to SetID.	Activity Based Management, Reports, Activity/Resource Reports, Activity Listing	RUN_RAB_2005
ABC2008 Cost Object Listing	Lists the cost objects in the database according to SetID.	Activity Based Management, Reports, Cost Object Reports, Cost Object Listing	RUN_RAB_2008
ABC2009 Driver Characteristics	Lists the driver characteristics as sorted by business unit and model ID.	Activity Based Management, Reports, Driver Reports, Driver Characteristics	RUN_RAB_2009
ABC2015 Driver Pointer	Lists all drivers that use pointers, and identifies the related pointer.	Activity Based Management, Reports, Driver Reports, Driver Pointer	RUN_RAB_2015
ABC2006 Object Assignment	Lists details of where resources, activities, and cost objects have been assigned.	Activity Based Management, Reports, Cost Object Reports, Object Assignment	RUN_RAB_2006
ABC2007 Object Contribution	Lists details on what resources, activities, and cost objects have contributed to the costs of a particular object within a given time frame.	Activity Based Management, Reports, Cost Object Reports, Object Contribution	RUN_RAB_2007
ABC2017 Capacity Rate Variance	Lists the volume, spending, and capacity variances associated with a given driver.	Activity Based Management, Reports, Cost Object Reports, Capacity Rate Variance	RUN_RAB_2017
ABC2002 Resource Listing	Lists all resources by SetID that exist within a database and their characteristics.	Activity Based Management, Setup, Reports, Activity/Resource Reports, Resource Listing	RUN_RAB_2002

Report Samples



Activities by Department



Set ID: SHARE

Effective Date: 02/18/2000

Department ID	Description	Activity ID	Description	Work Hours
10100	TEST	1.0	Understanding Market and Cust	11.00
		1.1	Determine Cust Needs & Wants	22.00
Total:				33.00



Resource Listing



Set ID: SHARE

Effective Date: 1/1/1900

Status: Active

Resource ID	Description	Use	Group	Supplied	Class	Source	Target
10200	HR - Benefits	Primary	People	Committed	Inventory	Y	Y
12000	Human Resources	Primary	People	Committed	Inventory	Y	Y
13000	Finance	Primary	People	Committed	Inventory	Y	Y
14000	Administration	Primary	Non people-related cost	Flexible	Non-inventory	Y	Y
21101	Sales Administration	Primary	People	Committed	Inventory	Y	Y
22001	Marketing	Primary	People	Committed	Inventory	Y	Y
31000	Customer Service	Primary	People	Committed	Inventory	Y	Y
43000	Research and Development	Primary	People	Committed	Inventory	Y	Y
51000	Purchasing	Primary	People	Committed	Inventory	Y	Y
55100	Shipping	Primary	People	Committed	Inventory	Y	Y
CORP1	Corp 1 Resource Tree	Primary	Non people-related cost	Flexible	Non-inventory	N	N
DEPARTMENT_RES	Department Resource	Primary	Non people-related cost	Flexible	Non-inventory	N	N
E1	Perkins,Sam	Primary	People	Committed	Inventory	Y	Y
E2	Edards,Tammy	Primary	People	Committed	Inventory	Y	Y
E3	E3	Primary	People	Committed	Inventory	Y	Y
E4	E4	Primary	People	Committed	Inventory	Y	Y



Activities by Employee



Business Unit

CORP1

Fiscal Year: 1999

Accounting Period:

1

Empl ID	Name	Rec Number	Dept ID	Work Group ID	Activity ID	Description	Activity Hours
E1	Walters,Gary	0.00	T000	G1			
					A1	A1 Desc	100
					A2	A2 Desc	100
Total Hours:							200
E2	Atchley,Tamara	0.00	T000	G2			
					A3	A3 Desc	80
					A4	A4 Desc	120
Total Hours:							200
E3	Barbatos,Samuel	0.00	T000	G1			
					A1	A1 Desc	60
					A4	A4 Desc	140
Total Hours:							200
E4	Little,Paula	0.00	T000	G2			
					A2	A2 Desc	50
					A3	A3 Desc	150
Total Hours:							200
E5	Johnson,Alice	0.00	T000	G2			
					A1	A1 Desc	20
					A2	A2 Desc	40



Activities by Workgroup



Set ID:

SHARI

Effective date: 01/01/1900

Work Group ID	Description	Activity ID	Description	Activity Hours
G1	Workgroup 1			
		10.0	Financial Management	1.00
Total Hours:				1.00



Activity Listing



Set ID: SHARE Effective Date: 1/1/1900 Status: Active

Activity ID	Description	Use	Group	Dimension	Consump.	Source	Target
1.0	Understanding Market and Cust	Primary	Multi-dimensional	Product/Service	Unit	N	N
1.1	Determine Cust Needs & Wants	Primary	Single Dimensional	Product/Service	Unit	Y	Y
1.2	Measure Customer Satisfaction	Primary	Single Dimensional	Product/Service	Unit	Y	Y
1.3	Monitor Changes in Market	Primary	Single Dimensional	Product/Service	Unit	Y	Y
10.0	Financial Management	Primary	Multi-dimensional	Product/Service	Unit	N	N
10.1	Manage Financial Resources	Primary	Single Dimensional	Product/Service	Unit	Y	Y
10.10	Reorganization Costs	Primary	Multi-dimensional	Product/Service	Unit	Y	Y
10.2	Processing Accounting Entries	Primary	Multi-dimensional	Product/Service	Unit	Y	Y
10.4	Conduct Audits	Primary	Multi-dimensional	Product/Service	Unit	Y	Y
10.6	External/Regulatory Reporting	Primary	Single Dimensional	Product/Service	Unit	Y	Y
2.0	Develop Vision and Strategy	Primary	Single Dimensional	Product/Service	Unit	N	N
2.1	Monitor External Environment	Primary	Single Dimensional	Product/Service	Unit	Y	Y
2.2	Define the Bus Concepts	Primary	Single Dimensional	Product/Service	Unit	Y	Y
2.3	Design the Organization Struct	Primary	Single Dimensional	Product/Service	Unit	Y	Y
2.4	Develop and Set Organiz Goals	Primary	Single Dimensional	Product/Service	Unit	Y	Y
3.0	Design Products and Services	Primary	Single Dimensional	Product/Service	Unit	N	N
3.1	Develop New Products/Services	Primary	Single Dimensional	Product/Service	Unit	Y	Y



Assignment



Business Unit CORP1 Scenario ID: ACTUAL01 Fiscal Year: 1999 Accounting Period: 1

Source Object: A1	Description: C1 Desc	Source Type: Activity
Driver: A1C1C2C3	Description: A1C1C2C3	Type: Amount

Object	Object Type	Description	Actual DRV Qty	Actual Amount	Actual Amount %	Budget DRV Qty	Budget Amount	Budget Amount %
C1	Cost Object	A1 Desc	20.00	89,309.09	20.00	20.00	0.00	0.00
C2	Cost Object	A1 Desc	20.00	89,309.09	20.00	20.00	0.00	0.00
C3	Cost Object	A1 Desc	60.00	267,927.27	60.00	60.00	0.00	0.00
					100.00	0.00		



Object Contribution



Business Unit CORP1

Scenario ID: ACTUAL01

Fiscal Year:

1999

Accounting Period:

1

Primary

A1

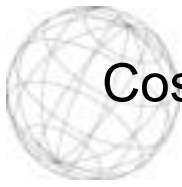
Cost Object

A1 Desc

Cost Object Type

Activity

Object	Type	Object Description	Actual Amount	Actual Amount %	Budget Amount	Budget Amount %
AS1	Activity	AS1 Desc	\$242,000.00	54.19	\$0.00	0.00
E6	Resource	E6	\$60,000.00	13.44	\$0.00	0.00
G1	Resource	Workgroup One	\$140,000.00	31.35	\$0.00	0.00
G2	Resource	Workgroup Two	\$4,545.45	1.02	\$0.00	0.00
			\$446,545.45	100.00	\$0.00	0.00



Cost Object Listing



Set ID: SHARE

Effective Date: 1/1/1900

Status: Active

Cost Object ID:	Description	Use	Group	Dimension	Target
9105	Associate Metal Desk	Primary	Single Dimensional	Product/Service	Y
ADMINISTRATIVE	Administrative	Primary	2	Product/Service	N
AMERICAS	Americas	Primary	Single Dimensional	Product/Service	N
ASIA	Asia_Pac	Primary	Single Dimensional	Product/Service	N
ASIA-PAC	Asia and Pacific Countries	Primary	Single Dimensional	Product/Service	N
AUSTRALIA	Australia	Primary	Single Dimensional	Product/Service	N
BUS_SUSTAIN	Bus_Sustain	Primary	Single Dimensional	Product/Service	Y
BUSINESS_SUSTAIN	Business Sustaining	Primary	2	Product/Service	Y
C1	C1 Desc	Primary	Single Dimensional	Customer	Y
C110	Chicago Merchants Group	Primary	Single Dimensional	Customer	Y
C120	San Francisco Global Markets	Primary	Single Dimensional	Customer	Y
C130	Butte Montana Suppliers	Primary	Single Dimensional	Customer	Y
C140	Miami Warehouse	Primary	Single Dimensional	Customer	Y
C150	New York Import/Export Inc.	Primary	Single Dimensional	Customer	Y



Driver Characteristics



Business Unit

CORP1

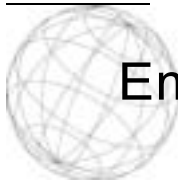
Model ID:

DEMO1

Effective Status:

Active

Driver ID	Description	Assign Method	Category	Class	Description
3.1	Development Time Spen	Spread Ev.	Other	Unit	
3.2	Hours Spent on Prototype	Amount	Other	Unit	
3.3	Hrs. spent refining Prod. Line	Amount	Other	Unit	
3.4	Driver 3.4	Amount	Other	Batch	
4.1	# of Sales Calls	Amount	Other	Unit	SALECALL
4.2	Number of Customer Order	Amount	Other	Unit	CUSTORDR
BUSN_SUST	Business Sustaining	Direct	Other	Unit	
CUST_SUST	Cust	Direct	Other	Unit	
D11001	PROFILE FOR 11001	Amount	Other	Batch	
D12000	PROFILE FOR 12000	Amount	Other	Batch	
D13000	PROFILE FOR 13000	Amount	Other	Batch	
D14000	PROFILE FOR 14000	Amount	Other	Batch	
D21101	PROFILE FOR 21101	Amount	Other	Batch	
D31000	PROFILE FOR 31000	Amount	Other	Batch	
D41000	PROFILE FOR 41000	Amount	Other	Batch	
D51000	PROFILE FOR 51000	Amount	Other	Batch	
D52200	PROFILE FOR 52200	Amount	Other	Batch	



Employees by Department

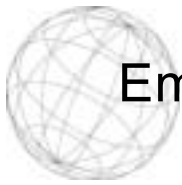


Business Unit: CORP1

Fiscal Year: 1998

Accounting Period: 1

Department ID	Description	Empl ID	Rec. No.	Name	Activity Hours
ODEP1	ODEP1				
		OEMP1	1	OEMP1,OEMP1	325
		OEMP2	1	OEMP2,OEMP2	325
Total Hours:					650



Employees by Work Group



Business Unit CORP1

Fiscal Year: 1999

Accounting Period: 1

Work Group ID: G1		Description: Workgroup 1		
Dept. ID	Empl. ID	Rec. No.	Name	Activity Hours
T000	E1	0.00	Walters,Gary	200
T000	E3	0.00	Barbatos,Samuel	200
Total Hours:				400



Object Cost



Business Unit: CORP1

Scenario ID: ACTUAL01

Fiscal Year: 1999

Accounting Period: 1

Resource Use	Primary	Object Type	Activity	
Object ID	Description	Target	Model Type	Amount
A1	A1 Desc	Yes	Actuals Model	\$893,090.91
A2	A2 Desc	Yes	Actuals Model	\$740,363.64
A3	A3 Desc	Yes	Actuals Model	\$940,363.64
A4	A4 Desc	Yes	Actuals Model	\$1,162,181.82
A5	A5 Desc	Yes	Actuals Model	\$1,664,000.00
AA	AA	No	Actuals Model	\$5,400,000.00
AB	AB	No	Actuals Model	\$4,506,909.09
AC	AC	No	Actuals Model	\$2,102,545.45



Driver Pointer



Business Unit: CORP1 Model ID: 3ACT

Driver ID/ Description	Object ID/ Description	Pointer ID	UOM
DRV13	CUST2	25	
ACT17 TO CUST1, CUST2	CUST2	25	
DRV13	CUST1	50	
ACT17 TO CUST1, CUST2	CUST1	50	
DRV14	CUST1	75	
ACT25 TO CUST2, CUST1	CUST1	75	
DRV14	CUST2	75	
ACT25 TO CUST2, CUST1	CUST2	75	
DRV22	CHAN1	50	
ACT14 TO CHAN1, CHAN2	CHAN1	50	
DRV22	CHAN2	75	
ACT14 TO CHAN1, CHAN2	CHAN2	75	
DRV24	2ACT10	50	
RES1 TO ACT10, 2ACT10	2ACT10	50	
DRV24	ACT10	50	
RES1 TO ACT10, 2ACT10	ACTIVITY 10	50	



GL Drillback



Business Unit: CORP1 Scenario ID: 3ACT Fiscal Year: 1998 Accounting Period: 1

Target Object	2ACT10	2ACT10	Primary	Activity	
GL Ledger	GL Account	GL Dept	Total Ledger Amount	Mapped Percentage	Ledger Amount Mapped
ACTUALS	600010	13000	\$2,659,060.87	25.00	\$1,861,342,609.00



Capacity Rate Variance



Business Unit: CORP1 Scenario ID: ACT3 Fiscal Year: 1998 Accounting Period: 1

Source Object: 2ACT10	Description: 2ACT10	Source Type: Activity
Driver: DRV21	Description: 2ACT10, ACT10 TO PROD1, PROD2	Type: Amount

Object	Object Type	Description	Driver Qty.	Cap. Rate	Applied Cost	Act. Rate	Actual Cost	Variance
PROD2		PROD2	25.00	5,318.12	\$3,323.83	\$5,318.12	\$66,476.52	-\$63,152.70
PROD1		PROD1	100.00	5,318.12	\$13,295.30	\$5,318.12	\$265,906.09	-\$252,610.78
			125.00		\$16,619.13		\$332,382.61	-\$315,763.48



Transaction Cost



Business Unit: CORP1 Scenario ID: ACTUAL01 Fiscal Year: 1999 Accounting Period: 1

Transaction ID	Description	Prod ID	Cust ID	Chan ID	# of Trans.	\$ Per Trans.	Total Cost
A1	C1 Desc	A1	A1	A1	1,000	\$223.27	\$223,272.73



Object Rate



Business Unit: CORP1 Scenario ID: 3ACT Fiscal Year: 1998 Accounting Period: 1

Object ID	Use	Type	Description	Object Value	Quantity	Rate
2ACT10	Primary	Activity	2ACT10	332,382.61000	1,000	332.40
ACT10	Primary	Activity	ACTIVITY 10	332,382.61000	1,000	332.40
ACT10	Primary	Activity	Develop Communication Material	332,382.61000	1,000	332.40
ACT14	Primary	Activity	ACTIVITY 14	664,765.22000	1,000	664.80
ACT14	Primary	Activity	Underwrite New Business	664,765.22000	1,000	664.80
ACT17	Primary	Activity	ACTIVITY 17	664,765.22000	1,000	664.80
ACT26	Primary	Activity	ACTIVITY 26	332,382.61000	1,000	332.40
ACT26	Primary	Activity	Prepare Annual Product Prospec	332,382.61000	1,000	332.40
ACT27	Primary	Activity	ACTIVITY 27	332,382.61000	1,000	332.40
ACT27	Primary	Activity	Perform Policy Audits	332,382.61000	1,000	332.40
CHAN1	Primary	Cost Object	CHAN1	398,859.13000	1,000	398.90
CHAN1	Primary	Cost Object	Company Agent	398,859.13000	1,000	398.90
CHAN2	Primary	Cost Object	CHAN2	265,906.09000	1,000	265.90
CHAN2	Primary	Cost Object	Independent Agent	265,906.09000	1,000	265.90
CUST1	Primary	Cost Object	CUST1	553,971.01000	1,000	554.00
CUST1	Primary	Cost Object	High net Worth Individual	553,971.01000	1,000	554.00
CUST2	Primary	Cost Object	CUST2	775,559.42000	1,000	775.60



Activity Fragmentation



Business Unit: CORP1 Scenario ID: ACTUAL01 Fiscal Year: 1999 Accounting Period: 1

Activity ID	Description	Activity Cost	FTE	Head Count	Fragmentation
A2	A2 Desc	\$370,181.82	2.9000	9	0.3000
A1	A1 Desc	\$446,545.45	2.7000	9	0.3000
A3	A3 Desc	\$470,181.82	4.4000	9	0.5000
A4	A4 Desc	\$581,090.91	5.1000	9	0.6000