PeopleSoft EPM 9.1: Scorecard

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user’s guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
Bold	Highlights PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Highlights field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. Italics also highlight references to words or letters, as in the following example: Enter the letter *O*.
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
`Monospace font`	Highlights a PeopleCode program or other code example.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.

Typographical Convention	*Description*
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America

- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What’s new in the PeopleSoft Online Help.
- PeopleSoft Online Help acessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

Contact Us

Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

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Chapter 1

Getting Started with PeopleSoft Scorecard

PeopleSoft Scorecard Overview

PeopleSoft Scorecard communicates strategic goals to your organization and monitors their progress. With PeopleSoft Scorecard, you establish specific strategic goals for key areas within your organization, define how to measure their success, and communicate that information across your entire organization. Because all employees are aware of the goals, they can understand their impact on achieving them and align their actions accordingly. As they use PeopleSoft Scorecard to measure the outcome of their actions, they can quickly make further adjustments as needed to successfully achieve the goals. Put simply, using PeopleSoft Scorecard you can manage and measure key performance indicators (KPIs) and communicate strategic direction and results to your organization. The scorecard shows how well the strategy is working and provides the information that you need to determine what changes are required to improve performance results. With this information, your organization can adjust, respond, and proactively manage the changing business environment.

PeopleSoft Scorecard enables you to:

- Provide a framework that organizes strategic thinking and performance measurement.
- Clarify and build consensus on strategic direction.
- Communicate strategy and measures of success.
- Align behavior and increase focus on priority initiatives.
- Support strategic planning through metric relationship analysis and organizational learning.

The main tasks that you perform while using the application are:

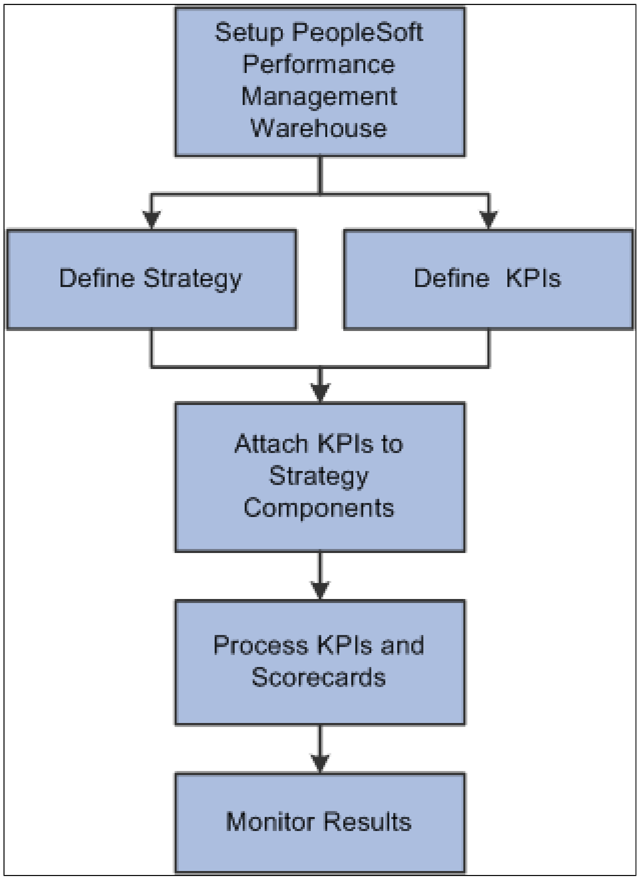
- Define your organization's strategic goals.
- Establish your strategy.
- Establish key performance indicators.
- Run the jobstreams that calculate KPIs and assess KPIs and scorecards.
- Monitor scorecards.
- Override assessments if necessary.
- Communicate status to key individuals within your organization.

While the foundation behind the application is the balanced scorecard theory developed by Robert S. Kaplan and David P. Norton, PeopleSoft Scorecard can be used to align with any management theory, such as Baldrich or total quality management, or it can be used as a purely operational measurement reporting tool; it truly is an information delivery and communication tool.

The following diagram illustrates, at a very high level, the tasks that you complete when you implement PeopleSoft Scorecard, which includes: setting up PeopleSoft EPM; defining strategy components and KPIs; attaching KPIs to strategy components; processing KPIs and scorecards; monitoring results.

Image: Scorecard implementation tasks

Scorecard implementation tasks



Most of these tasks include several steps, and require that you complete multiple pages in the application. These details are covered in the subsequent topics of this documentation.

Additional, essential information describing the setup and design of your system appears in *PeopleSoft Performance Management Fundamentals*. This companion volume of documentation provides information needed to complete the core setup for all PeopleSoft Enterprise Performance Management (PeopleSoft EPM) applications. This documentation also discusses the system architecture, the mapping of data into the warehouse, and the EPM foundation tools.

Related Links

Balanced Scorecard Theory

Scorecard Business Processes

This application is part of the Strategic Planning and Performance Management business process, and is applicable to the Plan to Act phase.

Scorecard Integrations

Scorecard interacts with other PeopleSoft Enterprise Performance Management (EPM) applications. The application can:

- Support sophisticated analysis through links to PeopleSoft EPM certified reporting tools.
- Integrate with enterprise resource planning (ERP), legacy, or external data.
- Use other PeopleSoft analytic applications for complex calculations.
- Publish KPI information.

  Other applications can subscribe to the published KPI data using PeopleSoft Application Messaging.
- Analyze strategic data across your PeopleSoft systems with the PeopleSoft Enterprise Performance Management suite of applications.

This table lists the PeopleSoft applications that interact with PeopleSoft Scorecard and their corresponding data sources:

PeopleSoft Enterprise Performance Management Application	***PeopleSoft Data Source***
Supplier Rating System	PeopleSoft Supplier Relationship Management application data.
Workforce Scorecard	PeopleSoft Workforce Analytics application data.
Customer Scorecard	PeopleSoft Customer Relationship Management application data.
Project Portfolio Management	PeopleSoft Project Costing. PeopleSoft Program Management.

Note: KPIs for the CFO and Government Portal solutions are also delivered as part of the Enterprise Performance Management Portal Pack.

See *PeopleSoft Enterprise Performance Management Portal* product documentation.

PeopleSoft Scorecard 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 product documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in the PeopleSoft documentation with information about where to find the most current version of each.

See also *PeopleTools: PeopleSoft Setup Manager*

and *PeopleTools: PeopleSoft Component Interfaces*

Common Elements Used in PeopleSoft Scorecard

	Image indicating that the trend is positive or improving.
	Image indicating that the trend is down or worsening.
	Image indicating that the trend is constant, unchanged.
	Indicates that the component or KPI is being monitored only, not assessed.
	Click to access the Comments page, and enter comments. In grids, this button appears when no comments currently exist.
	Click to access the Comments page, and enter or view comments.
	Click to access the Send Email page, where you can create and send emails.
	View causes and effects for the current object.
	View attachments.
	View project details.
<assessment image> such as: , ,	Displays the current assessment results. The images that actually appear for an implementation depend on the assessment definitions that have been established.
% of Target	The percentage of the actual value compared to its target value.
% Year over Year	The percentage change between the current year's actual results and last year's actual results for the same period.
Actual Value	The resolved value for the object.
Add to Favorites	Click to add the object to a group of KPIs or strategy components that are designated as favorites. Several pages provide a view of your favorites.

Analyze	Click to access the KPI Analysis Paths page, where you can navigate through the KPI tree.
Approval Required	If this display-only check box is selected, it indicates that the strategy components or KPIs require approval for comments or overrides.
Assessed As Of	The date and time that the component was assessed.
Assessed Using	Lists the assessment method that is used by the strategy component. Options are: *Worst Case, Best Case, Weighting, Most Frequent.*
Attachments	Click to access the Attachments page and view the attachments that are associated with strategy components or KPIs.
Business Function	The area of your organization that is associated with the KPI.
Calculated As Of	The date and time that the component was calculated.
Cause and Effect	Click to access either the Strategy Cause and Effect page or the KPI Cause and Effect page and review cause and effect relationships.
Causes	The components or KPI dimension members that the current component or KPI dimension member has an impact upon.
Chart or Chart It	A check box that you select to include that data in a graph.
Compare KPIs	Click to access the Compare KPIs - Selection page and select KPIs to compare.
Current Target	The object's target for the current period.
Description	The description for the component.
Desired Direction	The preferred trend for this KPI over time.
Dimension	The description of the KPI dimension member.
Effects	The components or KPI dimension members that affect the current component or KPI dimension member.
Initiative	Click to access the Strategic Initiative page and review the performance of strategic initiatives.
KPI List	Click to access the KPI List page and review KPIs.
KPI Owner	The person designated as the owner of a KPI.
KPI Usage	Indicates whether the KPI is for operational or procedural use.
LY QTD Value	Last year's QTD value, if history is available.
LY Value	Last year's value.

LY YTD Value	Last year's YTD value, if history is available.
Manual KPI	If this display-only check box is selected, it indicates that the KPI is defined as a manual KPI.
Monitor Only	This text appears for KPIs (and their objects) that are designated as monitor only on the KPI Definition - Definition page.
Notes	Displays any text that is entered in the Notes field for KPIs or strategy components.
Overall KPIs	The total number of KPIs (including those that were *not* considered during processing) that received the assessment.
Override	Click to access the Manual Assessment page and override an assessment.
Override Status	Indicates the status of a manual assessment. Options are: *Applied:* processed. *Pending:* not yet processed. *Denied:* not approved. *Original:* the original assessment.
Overridden	This text appears for any objects whose assessment has been overridden.
Owner	The person who is designated as the owner of the strategy component or KPI.
Period	The calendar period of the assessment.
Perspective or Perspective Type	The perspective in which the component is categorized.
Previous Page	Click to display the previously viewed page. Do not use your browser's back button.
QTD Value	The total for the quarter-to-date.
Remove From Favorites	Click to remove the object from the group of favorite KPIs or strategy components.
Responsible	The person responsible for the strategy component of KPI.
Strategy	Click to access the View Strategy page and review your strategy performance.
Strategy Count	The total number of strategy components that received the assessment.
Target	The target value.
Trend or Trend Indicator	Indicates how the object is performing over time.

Type or Component Type	The component type: thrust (strategic thrust), CSF, KPI, vision.
Used	If this display-only check box is selected, it indicates that the system considered the object when determining a component's score.
Used Count	The total number of KPIs considered during processing that received the assessment.
Used for Assessment	If this display-only check box is selected, it indicates that the system considered the object when determining a component's score. Same as Used.
Visibility Indicator	Indicates whether the KPI measures future performance, past performance, or both.
Weighted Average	The relative weight of the component.
Year	The calendar year of the assessment.
YTD Value	The total for the year-to-date.

Chapter 2

Understanding PeopleSoft Scorecard

Balanced Scorecard Theory

This topic contains an overview of balanced scorecard theory. While the Scorecard application was based on this theory, its design is flexible enough not to be limited by it. For a detailed discussion of the balanced scorecard theory, including examples and case studies, please refer to the book *The Balanced Scorecard* by Robert S. Kaplan and David P. Norton.

The balanced scorecard concept arose out of a recognized need to measure success on more than just financial statements. Focusing strictly on financial results doesn't provide an organization with the information that it needs to prosper in today's environment. Financial results provide an indication of past performance, but don't provide you with insight into your current status or where you'll likely be in the future. In addition, the balanced scorecard provides a framework and language that enable you to describe your strategy in a consistent, reliable manner.

The ultimate goal behind balanced scorecard theory is to measure the factors that create value for an organization and directly influence its ability to prosper. To do that, you must determine the answer to these questions:

- Where is the organization going?
- What is our strategy?
- What do we need to do well to achieve our strategy?

Measuring Across a Range of Indicators

With a true balanced scorecard, strategy and corresponding measurements are balanced across four areas: financial, customer, internal, and learning.

Financial	The goals in the financial perspective should serve as the focus for the goals in all the other perspectives. They indicate the ultimate financial performance to expect for a given balanced scorecard. Some examples are return on investment, profitability, sales growth, revenue, and cash flow. Financial goals typically differ depending on the maturity of the organization, because younger organizations are usually focused on growth while mature ones are more likely to be interested in maintaining existing market share and increasing it over time.
Customer	In the customer perspective, you identify the customer and market segments within which the organization chooses to compete. Typical measurements within this perspective focus on market share, customer retention, customer acquisition, customer satisfaction, and customer profitability.

Internal	This perspective focuses on the processes within the organization that are most critical for attaining customer and shareholder goals. In most cases, the objectives and measures of this perspective are developed after the financial and customer perspectives are defined. Typical measurements within this perspective focus on innovation, operations, and post-sale service.
Learning	This perspective focuses on developing objectives and measures to drive learning within an organization. Typically, this perspective considers employee capabilities, information systems, motivation, empowerment, and alignment. The objectives in this perspective drive the success of those in the first three perspectives.

The Scorecard application enables you to define your own perspectives.

See (Optional) Establishing Additional Perspectives.

Each business determines its own performance indicators. A bank might look at customer-to-account ratios, for instance, while a hospital might consider numbers of doctor referrals and patient satisfaction surveys. The data can come from back-office applications such as enterprise resource planning (ERP) systems, datamining and customer analytics software, or competitive reports and industry averages.

Balancing Measures

In addition to balancing your strategy, the objects that you use to measure your success should be balanced, and you should take into consideration:

- Performance drivers (leading indicators) and outcomes (lagging indicators).

  An effective balanced scorecard needs a combination of both performance drivers and outcome measures. Without outcome measures such as profitability, market share, or customer satisfaction, among others, a scorecard does not provide an indication of how well the organization is performing. Without performance drivers, such as objectives that are categorized within the internal and learning perspectives, you don't have an indication of whether your strategy is working. Performance drivers also communicate what steps are required to achieve the strategy.

- Internal and external indicators.

  Try to balance measures across indicators internal to your organization, such as sales growth rate, as well as those that are external, such as stock price or customer satisfaction rating.

- Qualitative and quantitative measures.

  Try to include measures that provide both qualitative information, such as employee satisfaction level, and quantitative information, such as sales amount.

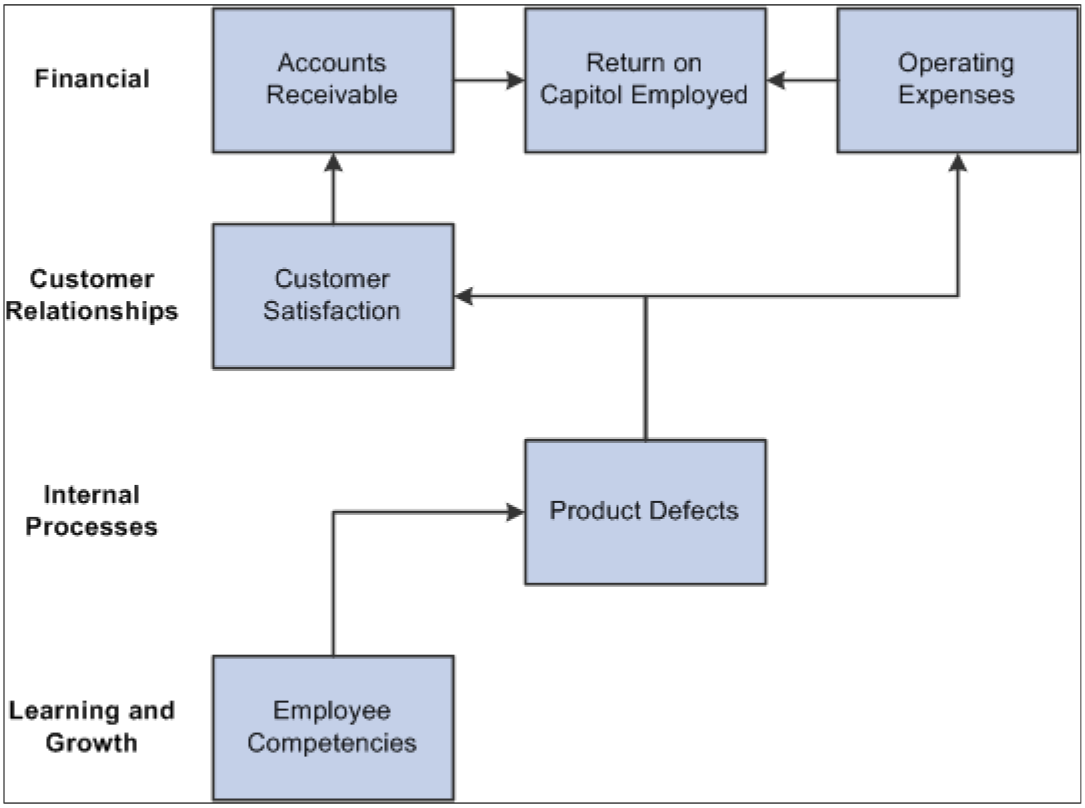
Linking Objectives and Measures

Objectives and measures need to be linked through cause and effect relationships. Causal paths from all the measures on a scorecard should ultimately link to financial objectives. This not only indicates how each measure impacts the financial goals, but it also illustrates to all members of the organization what impact their actions have on the outcome of the overall strategy.

The following diagram shows an example of how objectives and measures link with cause and effect relationships:

Image: Cause and effect example

Cause and effect example

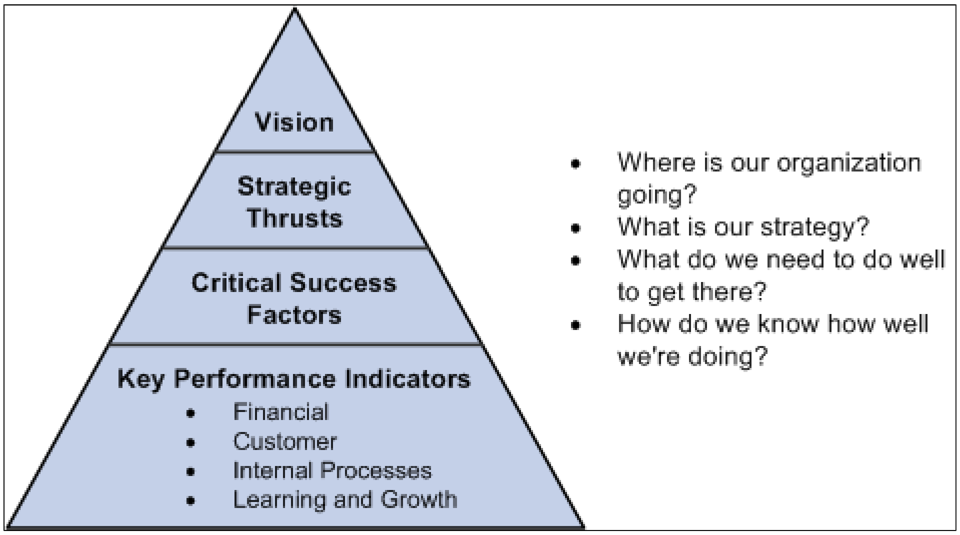


Applying Balanced Scorecard Theory

We've aligned our application with the balanced scorecard theory established by Robert S. Kaplan and David P. Norton so that you can fully benefit from the knowledge upon which it is based. The Scorecard application provides you with the tools that you need to translate your strategy into a scorecard, communicate it throughout your organization, measure progress towards achieving defined goals, inform key individuals automatically about scorecard status, and determine why problems occur. The following diagram depicts the hierarchy of Scorecard elements from Vision at the highest level, then strategic thrusts, then critical success factors, then KPIs at the lowest level, and how they associate with your organization's strategic goals:

Image: Measuring factors that create value for an organization

Measuring factors that create value for an organization



Key Terms

We use several terms regarding scorecards, strategy trees, and their components with which you need to be familiar. Because this terminology is still evolving and being standardized within the business community, you should understand the context in which we use each term.

Strategy or Strategy Tree

The hierarchical relationships of the objectives that your organization is striving to achieve. This is used as the foundation for a scorecard, and typically balanced across four major categories: financial, customer, learning, and internal. It is created from strategy components, which include vision, strategic thrusts, and critical success factors.

Vision

The overall mission of an organization. This is usually the highest level on a strategy tree. Vision is optional; you aren't required to have a vision component on each strategy tree.

Strategic Thrusts

The main goals that your organization is striving to achieve. In your strategy hierarchy, strategic thrusts are directly subordinate to vision (the next level below vision on your strategy tree). More specific descriptions of what you must do to achieve each goal are defined by CSFs. KPIs may be attached to strategic thrusts as long as no CSFs are below them, but typically strategic thrusts are not directly associated with KPIs.

Critical Success Factors (CSFs)

The key factors or objectives that must be accomplished for a particular strategic thrust. These are the specific tasks that an organization must do well or excel at to achieve its goals. In your strategy hierarchy, they are directly subordinate to strategic thrusts. KPIs are attached to CSFs.

Key Performance Indicators (KPIs)
The data value or calculation from the EPM database tables upon which an assessment is determined. KPIs are calculated values by which you assess your critical success factors, strategic thrusts, and strategic initiatives. Defined using KPI manager, they link to specific data within the EPM database. KPIs are not attached as nodes on a strategy tree; instead, they are associated with a strategy component or strategic initiative by means of the Strategy KPIs page.

KPI Dimension Members
The discreet objects, or data rows, that are defined by a KPI. For example, for an employee base pay KPI, the KPI dimension members are employees (by employee ID).

Strategy Component
An element that is part of your strategy hierarchy. Vision, strategic thrusts, and critical success factors are all strategy components.

Perspective
The categories within which you classify KPIs and strategy components. Usually, four are available: financial, customer, internal, and learning. Some scorecard views display assessments that are grouped by perspective.

Strategic Initiatives
The actions that an organization must take to implement a critical strategic goal. Strategic initiatives may be temporary or short-term in nature; they are a scheme, program, or special project that your organization wants to undertake. They are not part of nor do they use a strategy tree, however, strategy components and KPIs are associated with strategic initiatives. For example, a project such as "Year 2000 Compliance" could be categorized as a strategic initiative. The system includes pages for defining and viewing strategic initiatives.

Scorecard
The views of a strategy tree's components and KPIs and their assessment results.

Portfolio
A group of scorecards or KPIs that are related in some way.

Dimension
An attribute such as time, product, or location that is used to categorize or identify a particular piece of data. In the PeopleSoft Enterprise Performance Management product line, some examples of dimensions are product, customer, and channel.

Assessment
The outcome of comparing actual results with targeted goals. This is similar to a grading system. Assessments indicate how successfully an organization is achieving its goals. Assessment images appear on the scorecard.

This diagram shows the strategy components as they might typically appear on a strategy tree:

Image: Strategy tree components

Strategy tree components

ST is used as an abbreviation for strategic thrust. Similarly, CSF is an abbreviation for critical success factor.

PeopleSoft Scorecard Components

The Scorecard application has two main functional areas: KPI manager and the scorecard. You use KPI manager to define the KPIs that you want to measure. After KPIs are defined, you can use them in various Enterprise Performance Management applications. KPIs serve as the measures on your scorecard for your critical success factors, and indicate whether you're successful at achieving your goals.

You use the scorecard to describe your strategy, define scorecards, and monitor assessments, which indicate the level of success that is attained towards achieving the targeted results. The scorecard itself is a visual representation of the assessments of your various scorecard components. It uses an interactive graphical interface with links to view different aspects of the scorecard.

Keep in mind that while you typically define the components of a scorecard from the top down, because of data interdependencies, you use the Scorecard application to depict your scorecard from the bottom up. In other words, you should determine the structure and related measurements for your scorecard *before* using our application.

SetIDs, Business Units, and Currency Conversion

SetIDs or business units are mapped separately in PeopleSoft EPM and do not use the structure that is established in other PeopleSoft application tables. If the data that you import has a different base currency than the base currency for the data warehouse table to which you import the source data, you must define a currency conversion rule. Keep these basic principles in mind when you move data into PeopleSoft EPM and when you work with the PeopleSoft Scorecard system:

- Every data warehouse table that is a fact table (*_F00) is keyed by business unit.

  Fact tables contain monetary amounts in a given currency (CURRENCY_CD) and in a base currency equivalent amount (BCE_AMT) if the original data was in a different base currency prior to import into the system.

- Every data warehouse table that is a dimension (*_D00) or reference (*_R00) table is keyed by SetID.

- Only one base currency code exists per SetID.

  Any SetID that is mapped to another SetID must have a common base currency code. Any business unit must map to a SetID with a common currency code.

- Only one business unit is allowed per scenario, and every business unit has one base currency.

  So every scenario can have only one base currency.

- The basic extract, transform, and load rule (ETL rule) for importing a PeopleSoft application's source table data is to first find the base currency for a given SetID from the corresponding business unit.

  If the imported data currency code does not equal the base currency code for the EPM SetID and business unit, the ETL system calculates and supplies the amount for the base currency equivalent field.

- For employee-level tables, the rule is to find the employee ID on the Job table and use the corresponding business unit and base currency.

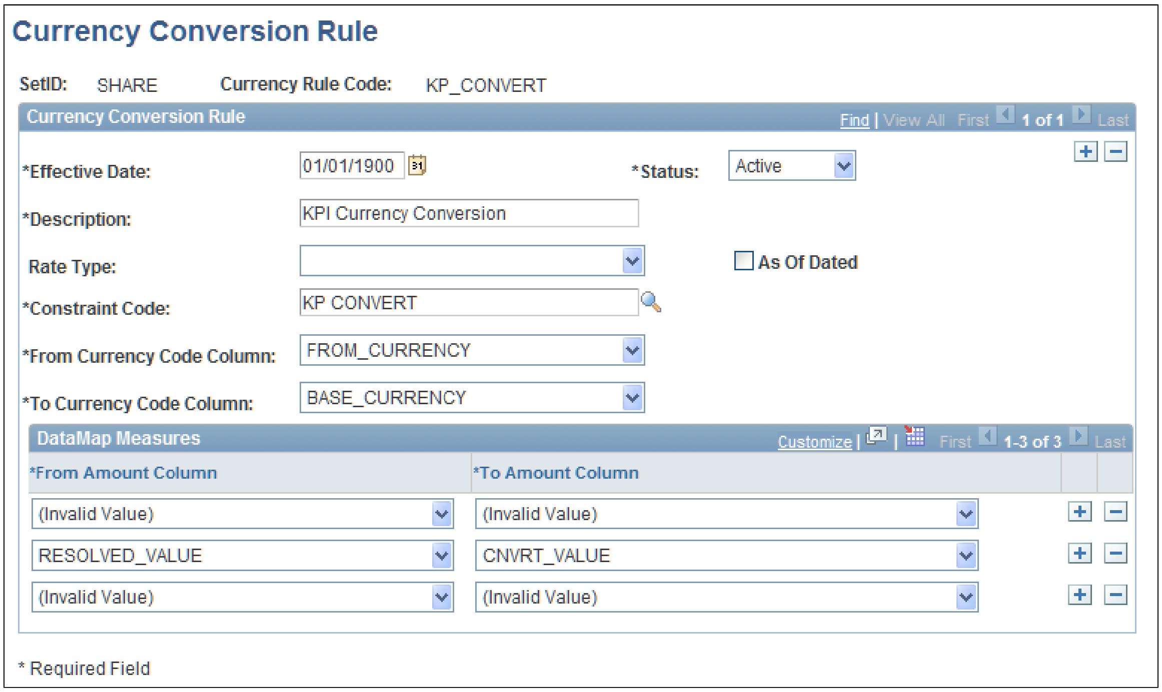
  For employee-level tables such as JOB_F00, base currency is derived from the business unit.

- KPIs are keyed by SetID; scorecards are keyed by business unit.

During KPI processing, to properly convert any monetary amounts that are not in a business unit's base currency, the system uses a currency conversion rule named KP_CONVERT (for each SetID). This rule is provided as part of the sample data within the SHARE SetID. To review currency rules, access the Currency Conversion Rule page by selecting EPM Foundation, Data Enrichment Tools, Currency Conversion, Identify Rules. Unless you have specific reasons for configuring it differently, you should set up this rule with the selections shown in this example; Rate Type is the one field that you might modify.

Image: Currency Conversion Rule page (PF_MC_RULE_DFN1), displaying the KPI currency conversion rule

This example illustrates the fields and controls on the Currency Conversion Rule page (PF_MC_RULE_DFN1), displaying the KPI currency conversion rule. You can find definitions for the fields and controls later on this page.



When the rate type is blank, the system uses the rate type that is defined for each business unit. This enables each business unit that shares this conversion rule to use different rate types for the conversion. Therefore, you could set up one SetID, and all business units within it could use this conversion rule.

If you enter a rate type, then all business units within that SetID will use the rate type that is specified for KPI currency conversion. If you need to use a different rate type for a given business unit, it must be defined under a different SetID. Therefore, when you enter the rate type, if you need to have any business units that use different rate types (and accordingly, different conversion rules), you'll need to use multiple SetIDs.

On the KPI Definition - Definition page, the Measure Type field should be set to *Currency* for any KPIs that involve currency amounts. Selecting this option instructs the system to convert foreign currency amounts to the business unit's base currency automatically during KPI processing.

Related Links

"Setting Up and Running Currency Conversion *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*"

Security Considerations

Applications such as Scorecard may contain confidential and sensitive human resources data or corporate financial data, requiring an additional level of security to grant users access to sensitive system data on a discretionary basis. The Scorecard application uses the security that is defined in PeopleSoft EPM.

Users that enter KPI data must be granted security access to the PF_EXPR_DEFN_BC component interface.

Related Links

Understanding KPI and Scorecard Processing

Chapter 3

Establishing and Maintaining KPIs

Understanding KPIs

This topic discusses:

- KPIs.
- Data elements.
- KPI dimension members.
- Assessments and target rules.
- Activities and actions.
- Calculation and assessment frequency.

KPIs

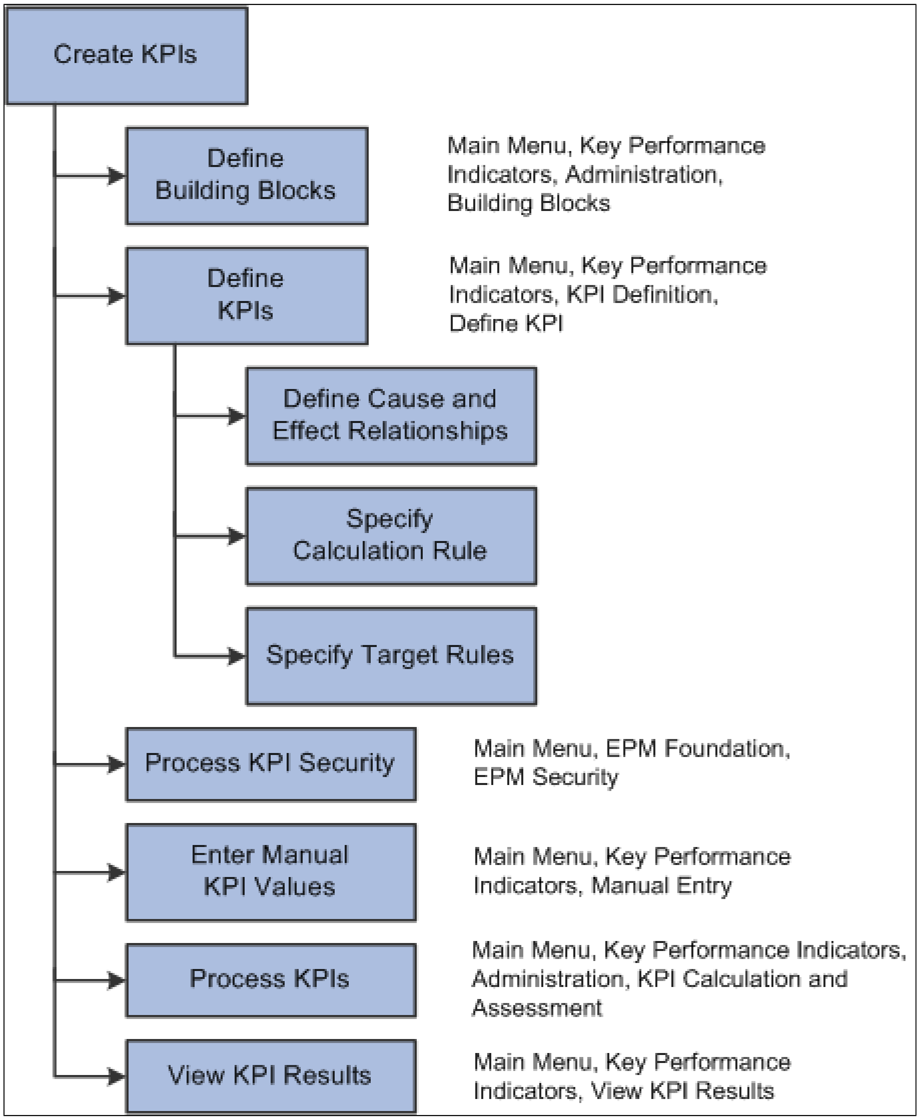
KPIs provide the metrics that are used within PeopleSoft analytic applications such as Scorecard and Workforce Analytics. They are derived from data within PeopleSoft EPM, or they can be based on manually maintained values. You obtain the information that you need to measure by defining KPI metadata and any additional calculations made to it. You also create the rules that control how KPI dimension members are assessed (how their score is determined). KPIs provide the link to PeopleSoft EPM data and enable you to automate the process of accessing key business data and measuring it against your goals.

In the Scorecard application, KPIs are associated with scorecard strategy components or strategic initiatives. However, this documentation describes KPIs *before* it discusses how to establish strategy components and scorecards. The topics are organized this way because KPIs must be set up before you can associate them with strategy components. Keep in mind that before you define KPIs, you should plan your strategy, because it determines which KPIs you need to create.

The following diagram outlines the steps for establishing KPIs, including: defining KPI building blocks; defining KPIs, including cause and effect relationships, calculation rules, and target rules; processing KPI security; entering values for manual KPIs; processing KPIs; viewing KPI results.

Image: Steps for setting up KPIs

Steps for setting up KPIs



This topic discusses only the setup steps; processing and viewing KPIs are discussed in subsequent topics.

KPI Types

When you define a KPI, you use the KPI Type field to indicate how the system determines the KPIs value. A KPI can be one of the following types:

- Calculated

  Calculated KPIs are based on data in PeopleSoft EPM, and the system computes their values during processing.

- Manual

Manual KPIs do not use data derived from PeopleSoft EPM tables to determine their values; instead, you enter their actual values using the Manual KPI page.

- Composite

  Composite KPIs are combinations of other KPIs. They help to track the performance of "soft" measures that aren't aggregates in a data warehouse. They can be based on any calculated KPIs, including other composite KPIs. Use them to compare and evaluate dimensions, such as customers, suppliers, channels, employees, and products across various attributes. The values for composite KPIs are obtained by summing their subordinate 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. You can use composite KPIs along with other KPIs in KPI portfolios. To analyze the results of a composite KPI and its component KPIs, use the KPI Analysis page.

  For example, a good candidate for a composite KPI would be a KPI that measures customer value; it can be based on completely different measures like customer sales, number of support calls, and ability to use as a reference, and you can weight the importance of each of the measures to determine the overall customer value.

- Derived

  A derived KPI is one whose value is determined by using the KPI results from a previous processing run for either a different KPI or for the same KPI, but using a different time period, scenario, or business unit.

To indicate how a KPI is calculated, you associate it with a calculation rule. These rules can either be based on a calculation expression (an equation), or based on another KPI. If they are derived from another KPI, you can vary some of the parameters for the calculation. When you associate a calculation rule with a KPI, you must specify a model.

Calculation expressions are established on the Calculations - Expression page. You can use a combination of defined KPIs, data elements, constant values, or built-in functions within calculation expression equations.

All KPIs use target rules to determine their assessments, and the system can calculate and assess quarter-to-date and year-to-date totals depending on the options that you establish. Weekly calculations and assessments are not supported.

KPI Families

KPI families enable you to define a group of related KPIs, so that you can easily switch between KPIs within the same family when you view KPI results. The family can represent the same metric along different dimensions or represent totally separate KPIs that are in some way related to each other. Families are established per SetID. To create the family definitions, you use the KPI Family page. As you use the KPI Definition page to create new KPIs, you can associate them with a family. To view the results for the KPI family members, use the KPI Detail page; a drop-down list box enables you to view another KPI within the same family.

Hierarchical KPIs

When you define a KPI, if you associate the KPI with a tree that defines the organizational hierarchy for the dimension, you can view the KPI results hierarchically based on that tree, with results summarized at each node. This enables you to navigate through your existing business hierarchies such as departments, regions, and products without the need to create unique KPIs for each level in your organization. The tree is made up of nodes that depict the organizational hierarchy for that dimension, with leaves that are the detail dimension values—for example, the individual employee IDs for the employee dimension. For example, by associating a KPI that measures employee base pay with a tree that uses the employee dimension and has nodes for each department, you can view the KPI results (employee base pay) aggregated by department.

The Hierarchical KPI page shows the KPI results aggregated by the dimension tree hierarchy. The assessments for summary nodes are based on the assessment results for the detail values subordinate to each node.

Hierarchical KPIs have several requirements:

- You must define tree metadata for the trees that are used for hierarchical KPIs.

  During KPI processing, the system uses the flattened dimension tree to compute the aggregate node values. Tree metadata defines the name of the record that stores the flattened tree data. The record that is used is PF_TRFL_KPI_TBL. Delivered dimensions already have this information defined, but, if you create your own dimensions, you need to enter this record name in the Flattened Table field on the Tree Metadata page.

- You must complete the detail fields for the tree structure associated with the dimension tree by using the Tree Structure - Details page in Tree Manager. This is to ensure that the roll up aggregation starts from the tree leaves (the detail values) instead of the tree nodes. The tree must be a summer tree.

- You cannot use composite KPIs as hierarchical KPIs.

- To use a manual KPI as a hierarchical KPI, do *not* select the No Aggregation check box on the KPI Definition - Add'l KPI Info page.

Data Elements

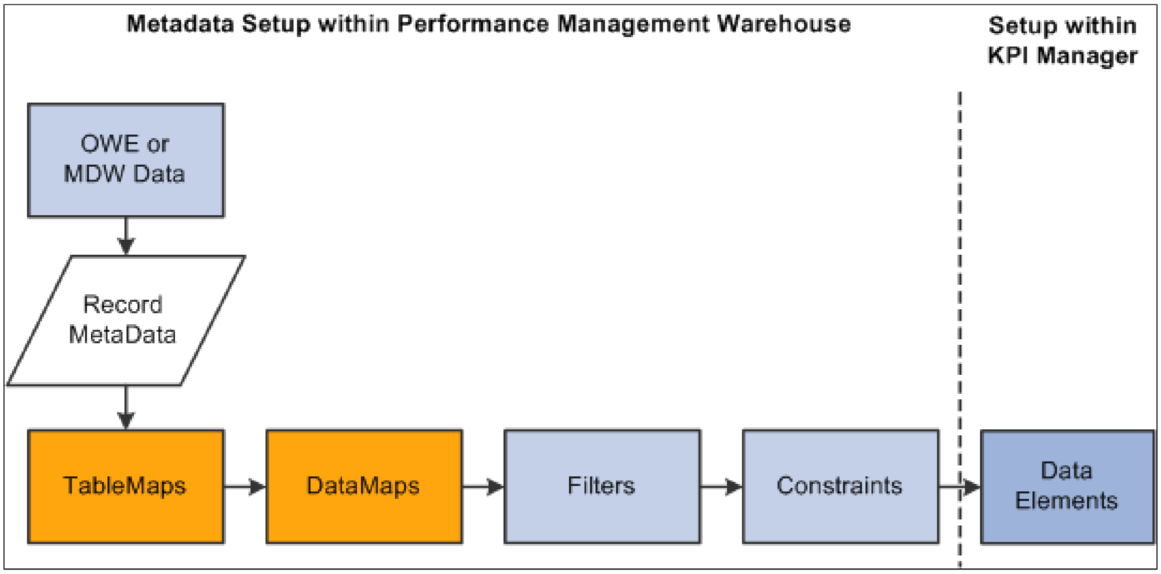
Data elements are a constraint-based subset of PeopleSoft EPM data, and are also referred to as a dataset. They can either result in a single value (a pointer) or retrieve multiple values that are grouped and subtotaled by dimension. They serve as the basis of calculated KPIs and can also be used as the target values upon which assessment results are based. They should be planned and set up in coordination with someone who is familiar with the PeopleSoft EPM database structure.

When you define a data element, the system creates a Structured Query Language (SQL) SELECT statement that extracts data from tables in the PeopleSoft EPM database to use within KPI expressions. For calculated KPIs, the data element is the key component that you must establish.

Data elements are based on constraints, which act as a filter and create the WHERE clause of the SQL SELECT statement that ultimately retrieves the data. Data elements are set up using KPI manager, but they require components that are established in PeopleSoft EPM. This diagram illustrates the relationship between data elements and their related PeopleSoft EPM database components:

Image: Relationship between data elements and Performance Management Warehouse components

Relationship between data elements and Performance Management Warehouse components



Use data elements to:

- Define which EPM data to target and use.
- Specify which dimension, such as product, customer, business unit, and so on, to use for calculations.
- Control how to combine data (for example, sum, count, average, and so on).

KPI Dimension Members

KPI dimension members are the individual elements or rows of data that are described by a KPI. In most cases, a KPI returns more data than is pertinent to your scorecard. Therefore, you specify which dimension members to include for a KPI by using the Dimension Members page. The dimension members can be defined by a rule (constraint-based) or can be individually specified. Rules are useful for KPIs that deal with a large volume of data that often changes and is difficult to keep current, such as employee data. For example, by using a rule, you can specify that the KPI should include all employees in department A. The constraints upon which a rule is based are established in PeopleSoft EPM. The rule can be based only on information available about the specific dimension. In other words, the criterion that drives the selection must be associated with the specific dimension of the KPI and might require that you associate the dimension table with other PeopleSoft EPM database tables. You can preview the dimension members for rule-based KPIs to validate what is selected by the constraint. If you are not using a rule to define the dimension members, the system can retrieve all of the dimension members from which you can select the specific ones to include.

You can specify the relative importance of each dimension member by assigning weight factors. During assessment processing, weights are used only when strategy components use an assessment method of weighting. Also, you can't use weights if the KPI dimension members are business units.

Assessments and Target Rules

Assessments are the "scores" of a scorecard; that is, they indicate to what extent KPI dimension member results achieve their targets. You establish assessment definitions, such as green, yellow, or red, using the Assessment Definition page. On this page you define the image and text that appears for that assessment on the scorecard, and its assigned color in charts. You also define the assessment numeric equivalent—its value is used during scorecard assessment processing to determine actual assessment results, or to compute weights, depending on the assessment method used by the strategy component.

You associate assessments with KPI dimension members by establishing the rules for assessment results—in other words, the value ranges that correspond to each assessment—using the Target Rule page. Think of this as being equivalent to a grade scale. Use this page to define the target value and to establish rules to designate the ranges of actual values that result in a given assessment. Target rules are defined for each dimension member for the KPI. If the dimension members are based on a rule, then a single target rule is used for all the dimension members. If the dimension members are specified individually, then each dimension member must be assigned a target rule.

Target values can be based on:

- Numeric values.
- PeopleSoft EPM database values (using data elements).
- A table of results that you manually maintain.

  This table is referred to as the default target table.
- A KPI.

The target rules compare a KPI dimension member's actual value to a target value or a percentage of the target. If that condition is true, the rule assigns the object the associated assessment. Target rules can:

- Determine whether an object's value is within a specified percentage of the target value.
- Compare an object's value to another data element's value.
- Compare an object's value to a number that you enter.
- Use the value of a dimension member from a different KPI as the basis for the comparison.

For any KPI, you can define target rules for three time frames—current period, quarter-to-date, and year-to-date. To determine quarter-to-date and year-to-date results, you *must* establish target rules for those time frames.

Activities and Actions

Using PeopleSoft Workflow, you can automatically send email messages or add items to a worklist based on assessment results. To do this, you establish the individual activities (the emails or worklist entries) using the Activity Definition page, and then associate one or more activities with an action using the Action Definition page. Actions are associated with KPIs on the Target Rule page. When you define the target ranges and their resulting assessments, you indicate what action, if any, takes place.

Calculation and Assessment Frequency

When you define a KPI, you can control when it is calculated (for calculated KPIs), or assessed, or both. These options are set up on the KPI Definition - Frequency page. If no specific calculation or assessment frequencies have been defined, the system calculates and assesses KPIs *every* time they are processed. The frequencies that are available are based on the calendar and associated frequencies defined for each business unit.

These settings enable you to control the monitoring of period-sensitive metrics such as earnings per share. For example, the value for earnings per share is reported only at quarter end and should affect the scorecard only at that time. Your organization might want to see the value for earnings per share each month on the scorecard as an indication of business performance. You might or might not want earnings per share assessed each month. However, earnings per share should affect the scorecard only when it is evaluated at the end of the quarter.

Note: Weekly scorecard assessments are not supported. Because a year does not break into full weeks, quarter to date (QTD) or year to date (YTD) values cannot be calculated correctly when using a weekly calendar, since end dates for a weekly calendar do not always fall on a month end date (which is how QTD and YTD roll up values are calculated). In a regular year, there are 52 weeks plus 1 day. In a leap year, there are 52 weeks plus 2 days.

Related Links

Understanding KPI and Scorecard Processing

Defining KPI Building Blocks

To define supporting objects use the Data Element Definition (KP_DATAELEM_DFN), Calculation Definition (KP_CALC_DFN), Activity Definition (KP_ACTIVITY_DFN), Action Definition (KP_ACTION_DFN), Assessment Definition (KP_ASSESS_DFN), System Options (KP_SETID_FLAGS), and KPI Weight Scale (KP_WEIGHT_TBL) components.

This topic discusses how to:

- Define data elements.
- Establish calculation definitions.
- Establish activity definitions.
- Establish action definitions.
- Establish assessment definitions.
- Establish KPI trees.
- Define summary calendars.
- Establish system options.
- Establish weight scales.

Pages Used to Define KPI Building Blocks

Page Name	***Definition Name***	***Navigation***	***Usage***
Data Element Definition	KP_DATAELEM_DFN	Key Performance Indicators, Administration, Building Blocks, Data Elements	Define the constraint-based data upon which to base data elements. Data elements are used in calculation expressions and as target values for calculated KPIs.
Constraint Definition	PF_CONSTRAINT_DEFN	EPM Foundation, Business Metadata, Constraint and Expressions, Constraint	Review or create constraint definitions.
Get Data Element Values	KP_DATAELEM_GET	On the Data Element Definition page, click Preview Values.	Retrieve the data defined by a data element to verify setup.
Calculation	KP_CALC_DFN2	Key Performance Indicators, Administration, Building Blocks, Calculations	Create a calculation definition (keyed by calculation ID). When you define a calculated KPI, you associate the KPI with a calculation definition to specify how the system determines the KPI's value.
Activity Definition	KP_ACTIVITY_DFN	Key Performance Indicators, Administration, Building Blocks, Activities	Establish activity definitions, which specify what type of activity occurs as a result of KPI assessment. One or more activity definitions are used in an action definition.
Action Definition - Definition	KP_ACTION_DFN1	Key Performance Indicators, Administration, Building Blocks, Actions, Definition	Establish an action definition.
Action Definition - Activities	KP_ACTION_DFN2	Key Performance Indicators, Administration, Building Blocks, Actions, Activities	Define the activities for an action.
Assessment Colors	KP_COLOR_TBL	Key Performance Indicators, Administration, Building Blocks, Assessment Colors	Define the chart colors that are available to use for assessments. You associate the chart color with an assessment definition to specify the color that represents the assessment in charts. Chart colors are delivered as system data. Typically, you use the delivered system data unless you want to limit the chart color options.
Assessment Definition	KP_ASSESS_DFN	Key Performance Indicators, Administration, Building Blocks, Assessment	Set up assessment definitions.

Page Name	***Definition Name***	***Navigation***	***Usage***
Tree Manager	PSTREEMGR	Tree Manager, Tree Manager	Create trees that depict a hierarchy of KPIs. Trees are used for KPI analysis paths.
Summary Calendar	BC_BU_SCENARIO	Key Performance Indicators, Administration, Assign Calendar to Scenario	Defines the summary calendar that is associated with a business unit for a particular scenario.
System Options	KP_SETID_FLAGS	Key Performance Indicators, Administration, System Options	Define SetID-level options for approving comments, publishing KPIs, enhancing performance, and controlling how the system handles the value zero in calculations.
KPI Weight Scale	KP_WEIGHT_TBL	Key Performance Indicators, Administration, Building Blocks, Weight Scales	Establish assessment value ranges for weighted strategy components.

Data Element Definition Page

Use the Data Element Definition page (KP_DATAELEM_DFN) to define the constraint-based data upon which to base data elements.

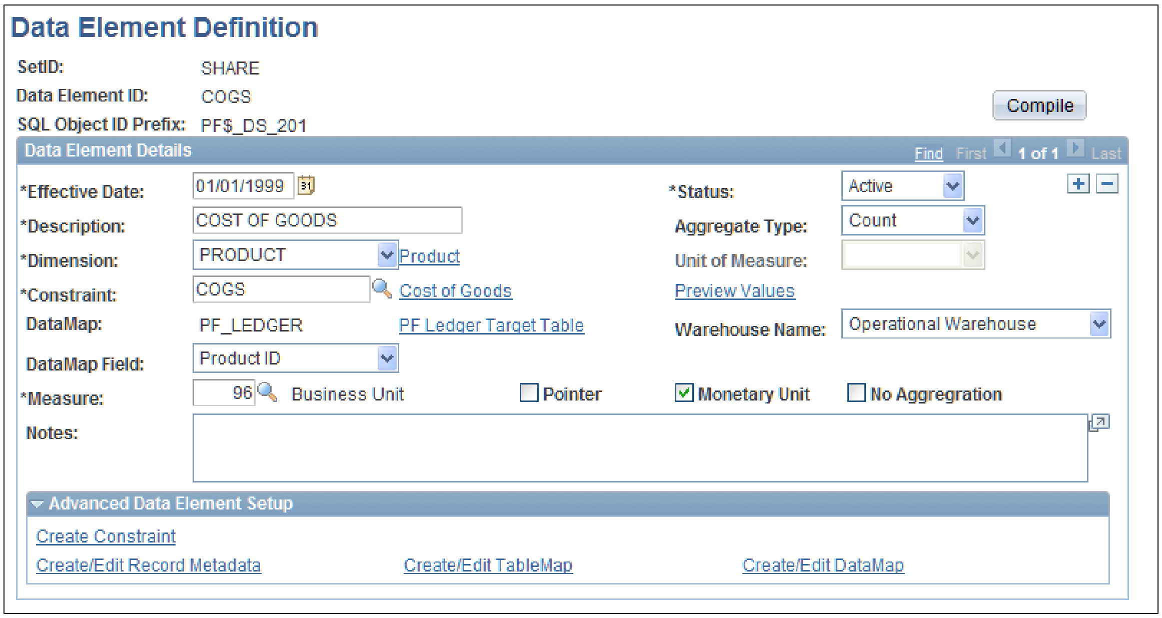
Data elements are used in calculation expressions and as target values for calculated KPIs.

Navigation

Key Performance Indicators, Administration, Building Blocks, Data Elements

Image: Data Element Definition page

This example illustrates the fields and controls on the Data Element Definition page. You can find definitions for the fields and controls later on this page.



Dimension

Select the dimension that the system uses to categorize the data described by this data element.

Data elements return multiple rows of data that are grouped and subtotaled based on the IDs of the dimension that you specify in this field (unless you use a pointer). For example, if you set the dimension to supplier, the system groups the rows of data by the individual Supplier IDs. Essentially, your selection creates the GROUP BY clause of the SQL statement. This field is not available for entry if the Pointer check box is selected.

Click the dimension description to access the Dimension page. Dimensions are established in PeopleSoft EPM.

Constraint

Select the constraint code upon which this data element is based.

The constraint code functions as a filter and is used to build the WHERE clause of the SQL SELECT statement that retrieves the data described by this data element. Only data that meets the criteria specified by the constraint code is included in calculations that use this data element. For example, you could use this option to include only amounts that are over a certain value, thereby eliminating rows of data that have no real significance.

Click the description to access the Constraint Definition page, where you can review the constraint.

Constraint Definition

Click to access the Constraint Definition page, where you can establish new constraints.

DataMap

Displays the datamap that defines the particular set of data used by the data element. The system derives the value for this field from the constraint that you select.

Click the description to access the DataMap component pages.

DataMap Field

Specify the datamap field that stores the detail dimension values, such as supplier ID. This field is not available if the Pointer check box is selected.

Click the description to access the Get Data Element Values page, where you can verify whether you correctly defined the data that is retrieved by the data element definition.

Measure

Select the datamap field that contains the values that the system evaluates. These values are ultimately used within KPI calculations or targets. This must be a numeric value except when Aggregate Type is *Count.*

Preview Values

Click to access the Get Data Element Values page, where you can verify whether you correctly defined the data that is retrieved by the data element definition.

Aggregate Type

Select how to combine the rows of data retrieved. Options are:

- *None:* Does not combine information in any way.
- *Avg* (average): Returns the average of all the records retrieved.
- *Avg Dist* (average distinct): Returns the average of all the unique records retrieved.

  For example, the average of (5, 8, 9, 12, 9, 7, 5) is 55/7, but the distinct average of (5, 8, 9, 12, 9, 7, 5) is 41/5.
- *Count:* Returns the count of all the records retrieved.
- *Count Dist* (count distinct): Returns the count of all the unique records retrieved.

  For example, the count of (A, B, A, C) is 4, but the distinct count of (A, B, A, C) is 3.
- *Group By:* Groups the records retrieved by the Measure field.

  Note: You can group by only one value.

- *Min* (minimum): Returns the minimum of all records retrieved.
- *Max* (maximum): Returns the maximum of all records retrieved.
- *Sum:* Returns the sum of all records retrieved.
- *Sum Dist* (sum distinct): Returns the sum of all unique records retrieved.

  For example, the sum of (1,1) is 2, but the distinct sum of (1, 1) is 1.

For example, assume that you want to establish a KPI that calculates average sales value (sales divided by number of customers). You need to set up a data element that retrieves the number of customers and use it in a KPI that divides sales (another data element) by the number of different customers. You would select *Count Dist* and use this data element as the denominator within your calculation expression.

The Aggregate Type field is not available if:

- The Measure field is an expression from the data map that already contains an aggregate function (such as an average).
- Pointer is selected.

The system uses the database column defined in the Measure field to determine if a record is unique. If more than one record has the same entry for that field, it is not considered unique. For example, if measure is set to *Amount,* then it would probably not make sense to use one of the distinct aggregate types, because you could end up with many records with the same amount. However, if the Measure field is set to *Customer Number,* then using one of the distinct aggregate types, such as *Count Dist,* would be valid. Doing so would ensure that you didn't include any customer more than once.

Unit of Measure

Select the measurement unit that applies. This field is not available when the Monetary Unit check box is selected.

Warehouse Name

Select the warehouse to use as the data source for this data element. Options are:

Multi-Dimensional Warehouse.

Operational Warehouse.

Pointer

Select to return a single row of data.

You must select this check box for any data elements that are used as targets in target rules. Because the data is summarized by business unit, when you select Pointer, the system automatically sets the Dimension to *Business Unit,* and disables the Aggregate Type, Dimension, and DataMap Field for Dimension fields.

Monetary Unit Select to indicate that the data element returns currency values. The system automatically computes the equivalent business unit base currency during processing for any foreign currency amounts.

No Aggregation Select to prevent the data described by the data element from being aggregated into totals such as business unit totals, scenario totals, or calendar-to-date totals. You typically select this check box when the data retrieved by a data element returns percentages or averages, because combining such values would not result in mathematically correct totals. If this check box is selected, the system retrieves the required historical data to correctly calculate quarter-to-date and year-to-date amounts instead of using amounts from prior periods. By default, this option is not selected, and the system summarizes data elements across business units based on the business unit tree.

Compile If you modify any underlying PeopleSoft EPM data, click to recompile the SQL. To ensure that you update all KPI-related SQL, use the PeopleSoft EPM mass compile utility.

SQL Object ID Prefix Displays the unique prefix used to generate the SQL clauses for this data element. The SQL objects have a prefix of PF$_DS_*nn,* where *nn* is the SQL object counter number.

Advanced Data Element Setup

Expand this group box to access links to the PeopleSoft EPM pages where you can create or edit the various objects that are used in the data element definition.

Create Constraint Click to access the Constraint page.

Create/Edit Record Metadata Click to access the Record Metatdata page.

Create/Edit TableMap Click to access the TableMap page.

Create/Edit DataMap Click to access the DataMap page.

See also “Setting Up the Operational Warehouse - Enriched for EPM Analytical Applications” in the *PeopleSoft Enterprise Performance Management Fundamentals* product documentation.

Related Links

Defining KPI Building Blocks

Calculation Page

Use the Calculation page (KP_CALC_DFN2) to create a calculation definition (keyed by calculation ID).

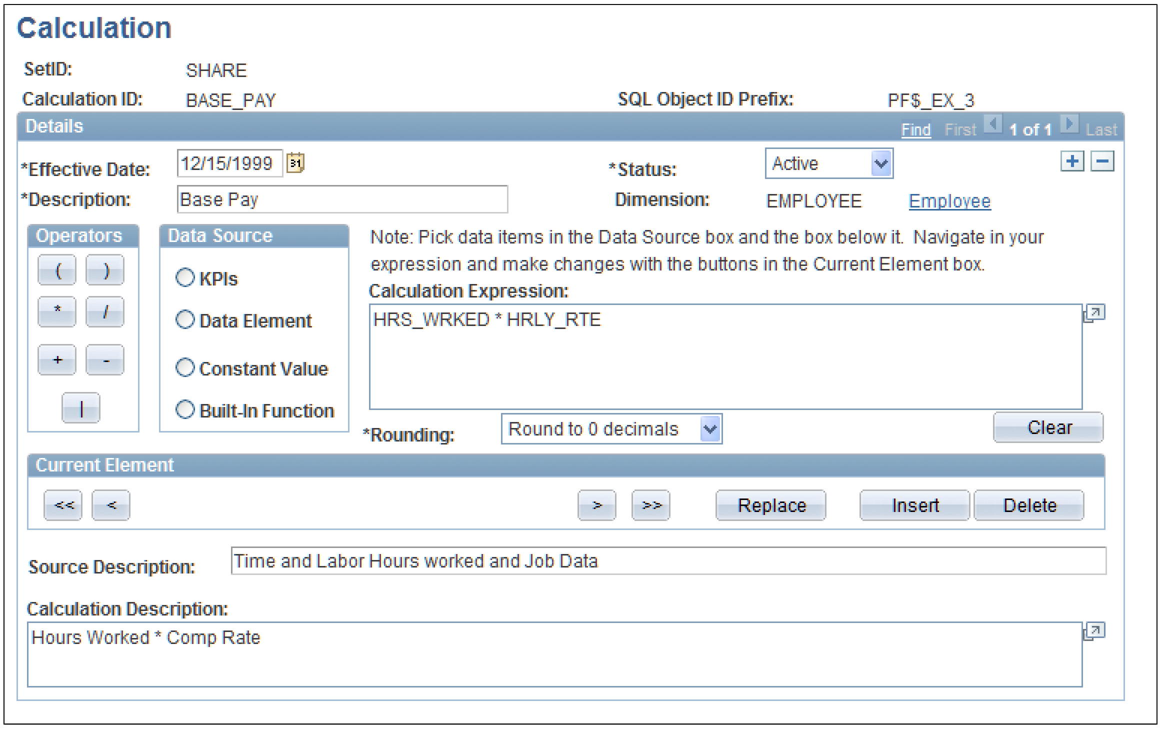
When you define a calculated KPI, you associate the KPI with a calculation definition to specify how the system determines the KPI's value.

Navigation

Key Performance Indicators, Administration, Building Blocks, Calculations

Image: Calculation page

This example illustrates the fields and controls on the Calculation page. You can find definitions for the fields and controls later on this page.



Entering Descriptions

Complete the following description fields for a calculation definition. These appear on various scorecard pages.

Description	Enter a description for the calculation ID.
Source Description	Enter a description of the source of the data that is used in the calculation.
Calculation Description	Enter a description of the calculation, preferably an example of the formula used.

Defining the Expression

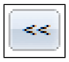
To define the expression, you must use the buttons and fields on this page to "build" the equation for this calculation ID; you can't create one by directly entering the expression into the Calculation Expression field. To build the equation, insert operators and data sources. All data sources that are used within the equation must belong to the same dimension. After you insert a data source object into the calculation expression, the system limits additional data sources to that dimension.

Data Source	Select the data source type to use in the calculation expression. After you choose the data source type, the system updates the page, and a new section appears that enables you to select the data source. After you select the appropriate data source object, click Insert (or Replace if appropriate) to add it to the equation being built. Options are: KPIs: Uses a KPI in the expression. When you select this option, the KPIs section appears, in which you can select the KPI ID to insert. Data Element: Uses a data element in the expression. When you select this option, the Data Elements section appears, in which you can select the data element ID to insert. Constant Value: Uses a constant value in the expression. When you select this option, the Constants section appears, with these options: • Ad-hoc: Select to use a constant. Enter a value in the Value field. • From List: Select to use the current value of a bind variable. The Val Obj ID (value object ID) field appears, in which you can select the cache value to use in your expression from the value object ID list. Items in this list are bind variables and use the current value from your cache. For instance, if you select *%FiscalYear,* the value is the current fiscal year of the data being analyzed. **Note:** If you use a constant as a divisor, its value cannot be equivalent to zero. Built-In Function: Uses a function in the expression. The Functions section appears, in which you can select the function to insert. Replace any parameters with some type of data source. You can use only one data element within each built-in function.
Operators	Click an operator button to insert that operator into the calculation expression.
Current Element	The current element of your expression is surrounded with double arrows, for example, <<HRS_WRKED>>. Use the buttons in this group box to navigate through the expression:

Note: On DB2/OS390, compose your expressions so that multiplication occurs before division; otherwise, decimal precision might be affected because values might truncate. Use parentheses to control the order of calculation and ensure correct decimal precision.

Selecting and Modifying Expression Elements

Use the buttons within the Current Element group box to select and modify an element within the expression. The system encloses the currently selected element with double arrows to differentiate it from other elements (for example, <<HRS_WRKED>>).



Click to navigate to the beginning of the calculation expression and select the first element.

Click to navigate one element to the left .

Click to navigate one element to the right.

Click to navigate to the end of the calculation expression.

Replace Click to replace the current element with the active data source.

Insert Click to insert the active data source before the current element.

Delete Click to delete the current element.

Additional Fields

Rounding Select the precision for numeric calculations.

Clear Click to erase the current expression.

SQL Object ID Prefix Displays the system-generated number that identifies the location of the SQL built by this page group in the SQL repository.

Dimension Displays the dimension used by the calculation expression. Initially this field is blank. When you insert the first data source into the calculation expression, the system automatically populates this field.

<dimension description> Click to access the Dimension page, where you can view the dimension details.

Example

Write down the expression that you plan to build before you begin. For this example, assume that you've decided to measure customer satisfaction by calculating the average wait time for a customer to be connected to a service representative. You've already set up a data element called DE_C0006 that returns total wait time. You've also set up another data element called DE_C0007 that returns the total number of calls received by your automated call system. The expression that you want to create is DE_C0006 divided by DE_C0007.

To build this expression:

1. Select the data element data source.

2. Select the data element ID *DE_C0006*.
3. Click Insert.
4. Click the / operator.
5. Select the data element ID *DE-C0007* (the data source is still set to data element).
6. Click Insert.
7. Save the page.

Activity Definition Page

Use the Activity Definition page (KP_ACTIVITY_DFN) to establish activity definitions, which specify what type of activity occurs as a result of KPI assessment.

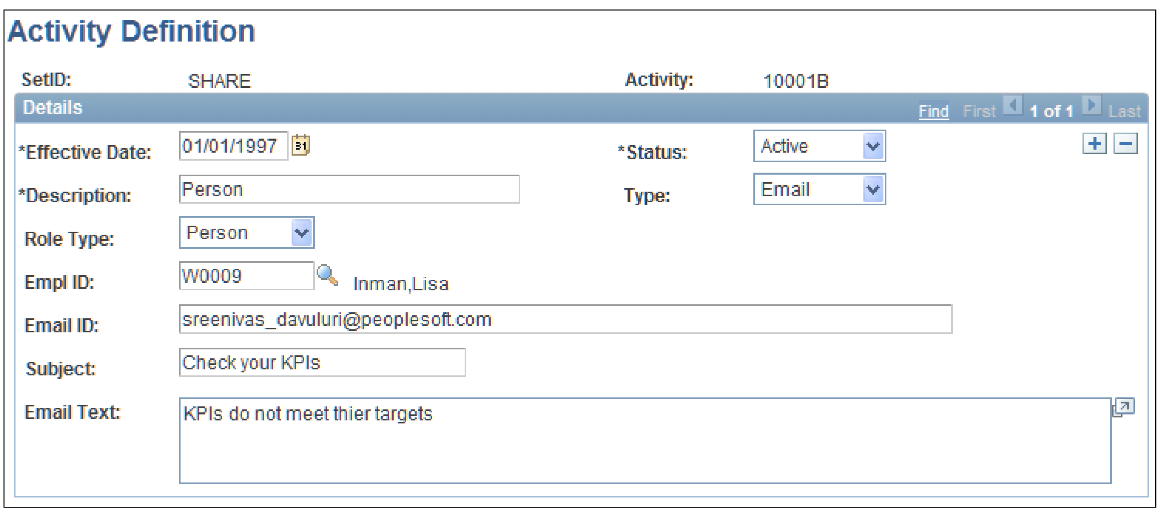
One or more activity definitions are used in an action definition.

Navigation

Key Performance Indicators, Administration, Building Blocks, Activities

Image: Activity Definition page

This example illustrates the fields and controls on the Activity Definition page. You can find definitions for the fields and controls later on this page.



An activity is either an email message or a worklist item. One or more activities make up an action. You associate actions with a KPI assessment by using the Target Rule page; you also dictate the notifications that take place when a KPI receives a specific assessment.

Type

Select the type of activity. The remaining fields that appear on this page depend on which activity type you select. Options are:

WorkList: Select to add a work item to a worklist for all members of a specified role.

Email: Select to send an email to an individual or group.

Role Type

Select to specify which type of role an email activity is sent to. Options are:

Role: Sends emails to the role that you specify in the Role Name field.

Person: Sends emails to the person that you specify in the EmplID (employee ID) field.

EmplID (employee ID)

Select to specify which employee an email activity is sent to. Applies to email activity types when the role type is *person.*

EmailID

Enter the email address. This field applies to email activity types only.

Role Name

Specify the role name to use. This field applies to worklist activities and role-based emails.

Subject

Enter the subject line to use for an email activity.

Email Text

Enter the email text to use for an email activity.

Note: Roles are defined through PeopleSoft security.

Related Links

Action Definition - Definition Page
Target Rules Page

Action Definition - Definition Page

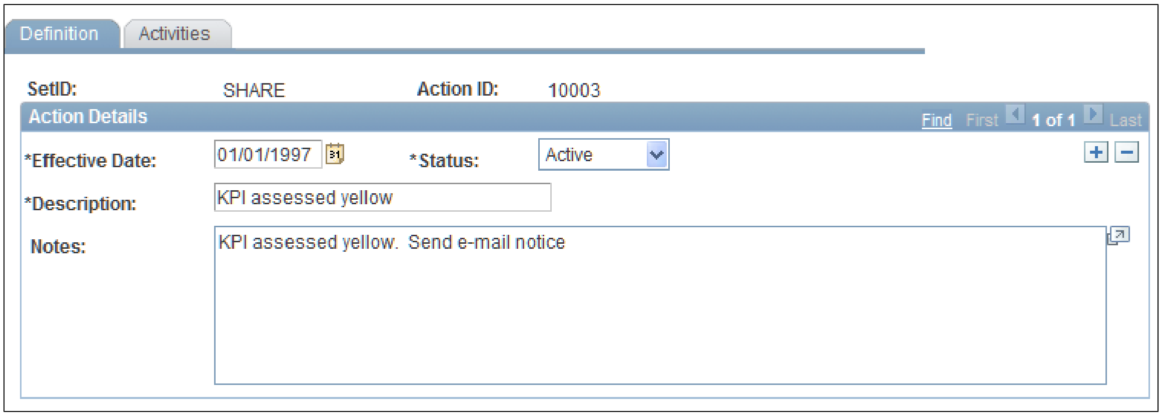
Use the Action Definition - Definition page (KP_ACTION_DFN1) to establish an action definition.

Navigation

Key Performance Indicators, Administration, Building Blocks, Actions, Definition

Image: Action Definition - Definition page

This example illustrates the fields and controls on the Action Definition - Definition page. You can find definitions for the fields and controls later on this page.



Actions are made up of one or more activities. You associate actions with a KPI on the Target Rule page. When you define a target range and its resulting assessment, you indicate what action, if any, takes place.

To establish an action:

1. Enter a description and any notes.
2. Select the Activities tab to access the Action Definition - Activities page, and then insert the activities for this action.

Related Links

Target Rules Page

Assessment Definition Page

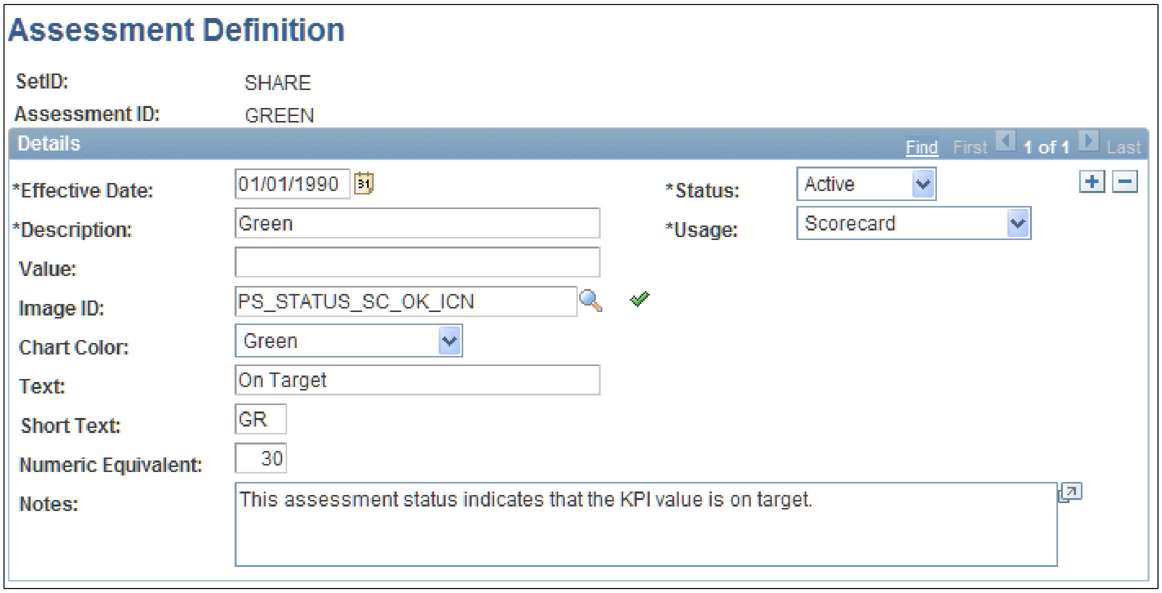
Use the Assessment Definition page (KP_ASSESS_DFN) to set up assessment definitions.

Navigation

Key Performance Indicators, Administration, Building Blocks, Assessment

Image: Assessment Definition page

This example illustrates the fields and controls on the Assessment Definition page . You can find definitions for the fields and controls later on this page.



Usage	Select whether this assessment is for use with *Scorecard* or *Workforce Analytics.* This selection determines the other fields that appear on this page. Typically you select *Scorecard.* Select *Workforce Analytics* only if you use this assessment with a KPI that is used by Oracle's PeopleSoft Workforce Rewards.
Value	Enter a value for this assessment. This field applies only when the Usage field is set to *Workforce Analytics.* PeopleSoft Workforce Rewards uses this value to compute compensation amounts based on a compensation planning scenario.
Text	Enter a description of the assessment. The initial value is the Description field contents.
Short Text	Enter a two-character equivalent for the assessment text. This is used in other pages and reports on which space is limited. The initial value is the first two characters of your description.
Chart Color	Select the chart color for this assessment. When you view scorecard or KPI charts, KPIs that receive this assessment appear as this color. Chart colors are set up on the Assessment Colors page.

Note: The remaining fields apply only to *Scorecard* assessments.

Numeric Equivalent

Enter a numeric value for this assessment.

During assessment processing, this number is evaluated to determine the scorecard assessment, depending on the strategy component's assigned assessment method (defined on the Component Definition page). You should ensure that the value used here is highest for green assessments and lowest for red assessments; otherwise, your scorecards will not accurately reflect the proper assessment results. For example, use 50 for green, 30 for yellow, and 10 for red.

Image ID

Select the scorecard image for this assessment.

Images are added with PeopleSoft Application Designer. Because some people are color blind, consider using an image with both a button and a color, or use letters within the colors to help differentiate them. The system provides many images.

To add images:

1. Select PeopleTools, Application Designer.
2. Select File, New, Image.

   The system prompts you for an image file.
3. Change the file type if necessary, and then navigate to your image file.

   Click Open to add it to the system.

Required Assessment ID

The system requires these assessment IDs: UNKNOWN and MONITOR. If they do not exist, the system creates them during assessment processing. The UNKNOWN assessment ID is used whenever an assessment cannot be assigned for various reasons. As delivered, this assessment ID uses a gray image and an assessment numeric equivalent of 1.

The MONITOR assessment ID is used for monitor-only KPIs (defined on the KPI Definition page). As delivered, this assessment ID uses a gray square image and an assessment numeric equivalent of 0. You can modify these settings.

Related Links

Understanding KPI and Scorecard Processing

Understanding Scorecards

Establishing KPI Trees

KPI trees show the hierarchical relationships among KPIs. You can use them to:

- Create KPI analysis paths.

These are used to analyze the factors behind a KPI's results, and they are needed for the KPI Definition - Analysis Paths page. The scorecard uses these trees to navigate through KPI details.

- Depict calculation relationships among interdependent KPIs.

  This is especially helpful when you create KPIs that are calculated based on other KPIs. This visual view makes it easier to understand how to define KPIs.

- Show KPI dependencies.

  For example, you can use them to show KPIs that are related in some way.

When KPI calculation dependencies exist, you might want to design your KPI trees before you define your KPIs.

To create a KPI tree, use a tree structure that links the tree nodes to the KPI Definition page. That way, when you create a KPI tree node, you can establish the KPI definition for it. The tree structure that the system provides, KPI_STRUCT, does this. Review the sample tree KPI_SALES_ANALYSIS, which is provided with PeopleSoft Scorecard.

To create a KPI tree:

1. Create a new tree using PeopleSoft Tree Manager.

   Use the KPI_STRUCT structure or a structure based on it.

2. Insert the tree nodes, starting with the root node.

3. Complete the KPI Definition page for each node, if you haven't already defined the KPI.

See also *PeopleTools: PeopleSoft Tree Manager*

Summary Calendar Page

Use the Summary Calendar page (BC_BU_SCENARIO) to defines the summary calendar that is associated with a business unit for a particular scenario.

Navigation

Key Performance Indicators, Administration, Assign Calendar to Scenario

To create quarter-to-date scorecard totals and other calendar summarization views, you must associate your quarter-to-date summary calendar with a scenario. Summary calendars must be established before you use them with scorecards.

To define a summary calendar:

1. Access the Summary Calendar page.

2. Select the business unit and scenario.

3. Select a summary calendar ID.

   Only summary calendars that are associated with the detail calendar of the specified scenario appear.

Related Links

Defining KPI Building Blocks

System Options Page

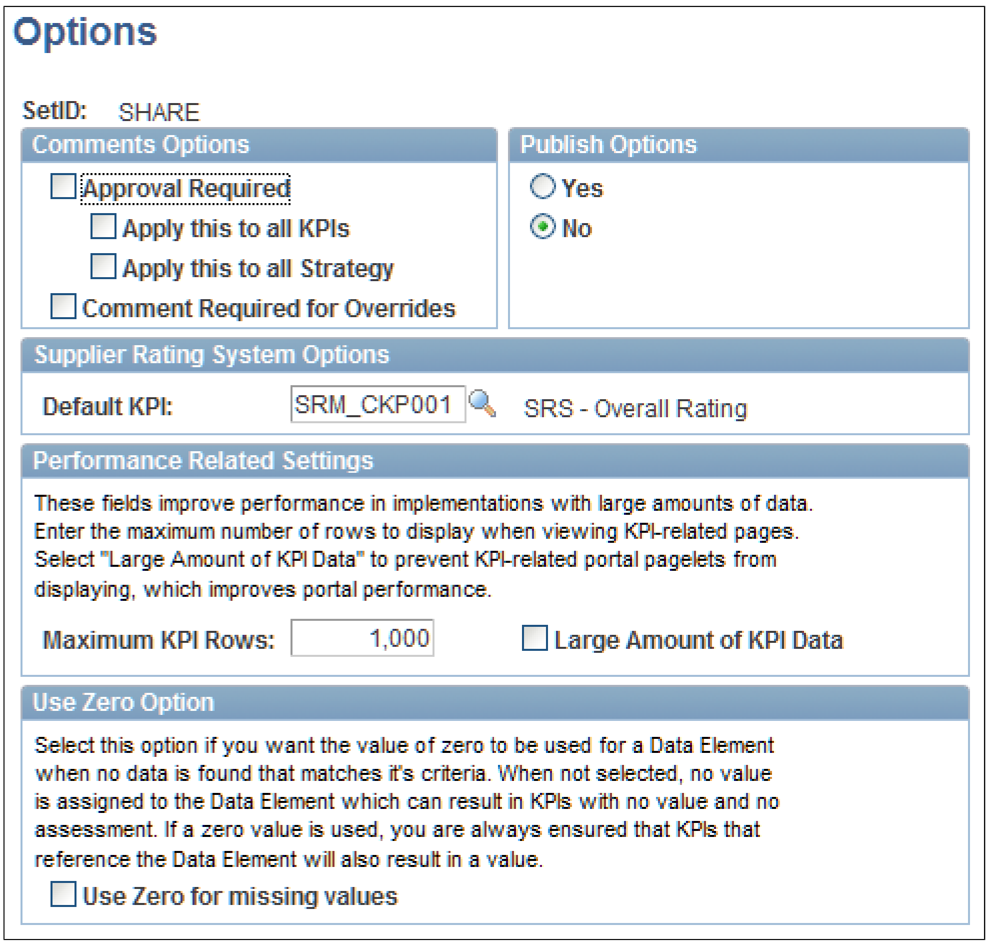
Use the System Options page (KP_SETID_FLAGS) to define SetID-level options for approving comments, publishing KPIs, enhancing performance, and controlling how the system handles the value zero in calculations.

Navigation

Key Performance Indicators, Administration, System Options

Image: System Options page

This example illustrates the fields and controls on the System Options page. You can find definitions for the fields and controls later on this page.



Options are established for each SetID.

Comments Options

Approval Required	Select to use comment workflow with KPIs and strategy components. This enables you to set up the approvals at the KPI

level (on the KPI Definition page) and strategy component level (on the Component Definition page).

Apply this to all KPIs — Select to require approvals for *all* KPIs within the SetID, overriding any approval setting at the KPI level.

Apply this to all Strategy — Select to require approvals for all strategy components within this SetID, overriding any approval setting at the strategy component level.

Comment Required for Overrides — Select to require comments to be entered whenever assessments are overridden. Requiring comments for overrides enables you to maintain an audit trail of the overrides, because comments are time- and date-stamped. If you also select the Approval Required check box, then any overrides must be approved before the system uses them.

Publish Options

Yes — Select to publish KPI fact data, which makes KPI information available to other applications that subscribe to it.

Publishing takes place when you process KPIs.

No — Select to avoid publishing KPI fact data.

Supplier Rating System Options

Default KPI — Select a default KPI to use for PeopleSoft Supplier Rating System portal pagelets.

Performance Related Settings

Maximum KPI Rows — Enter the maximum number of rows that the system displays on KPI-related pages. Lower numbers provide better system performance, but limit the data that the system displays to the number of rows specified in this field.

Large Amount of KPI Data — Select to prevent the system from displaying KPI-related portal pagelets.

Use Zero Option

Use Zero for Missing Values — Select to use the value of zero in cases in which a data element data is missing or unavailable. This ensures the system returns values and assessment results for KPIs even if the data elements that they reference do not contain data.

Related Links

Administering Scorecards and KPIs

Understanding KPI and Scorecard Processing

Understanding Workflow Functionality

KPI Weight Scale Page

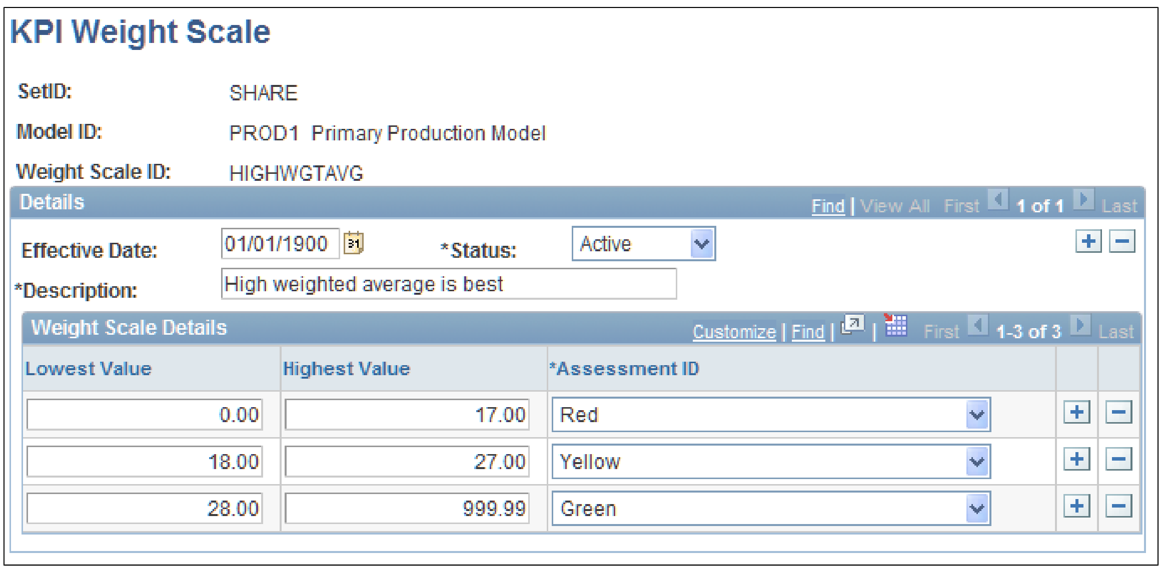
Use the KPI Weight Scale page (KP_WEIGHT_TBL) to establish assessment value ranges for weighted strategy components.

Navigation

Key Performance Indicators, Administration, Building Blocks, Weight Scales

Image: KPI Weight Scale page

This example illustrates the fields and controls on the KPI Weight Scale page. You can find definitions for the fields and controls later on this page.



Each model has its own set of weight scales. Within the grid area, insert a row for each range that you define. Enter the range's lowest value and highest value, and select the assessment ID to use as the assessment result for that range. Enter ranges in ascending order, ensuring that none of the values overlap. The values must be between 0 and 999.99. During processing, the system compares the actual value to the defined range for each row. If the actual value is within the range, the resulting assessment is the assessment ID associated with that range.

Note: Weight scales are used during scorecard assessment processing only if scorecards contain strategy components with an assessment method of weighting.

Related Links

Assessment Methods

Establishing KPIs

To establish KPIs use the KPI Definition (KP_KPI_DFN), KPI Calculation Rule (KP_CALC_RULE), Dimension Members (KP_KPI_OBJ_EFF), and Target Rule (KP_OBJ_TRGT_RLE) components.

This topic provides an overview of the KPI Definition component and discusses how to:

- Define KPIs.
- Specify additional KPI information.
- Define KPI calculation and assessment frequencies.
- Define optional KPI attributes.
- Specify calculation rules.
- Set up KPI dimension members.
- Define target rules.
- Identify cause and effect relationships.
- Create composite KPIs.
- Establish KPI families.
- Create a KPI from an existing KPI.

Pages Used to Establish KPIs

Page Name	***Definition Name***	***Navigation***	***Usage***
KPI Definition	KP_KPI_DFN	Key Performance Indicators, KPI Definition, KPIs, KPI Definition	Define a KPI and specify how to determine its value and the dimension upon which it is based.
KPI Copy	KP_KPI_COPY	From the KPI Definition page, click the Copy From link.	Copies the fields from another KPI into the current KPI.
KPI Definition - Additional KPI Information	KP_KPI_DFN1	Key Performance Indicators, KPI Definition, KPIs, Add'l KPI Info	Define a KPI's owner and specify display and formatting options, various strategic information, aggregation options, and options related to how it is used.
KPI Definition - Frequency	KP_KPI_DFN6	Key Performance Indicators, KPI Definition, KPIs, Frequency	Define KPI calculation and assessment frequency.
KPI Definition - Attachments	KP_KPI_DFN2	Key Performance Indicators, KPI Definition, KPIs, Attachments	Associate file attachments with a KPI.

Page Name	***Definition Name***	***Navigation***	***Usage***
KPI Definition - Analysis Paths	KP_KPI_DFN3	Key Performance Indicators, KPI Definition, KPIs, Analysis Paths	Associate KPI trees with a KPI. These trees depict the hierarchical relationships among KPIs.
KPI Definition - Attributes	KP_KPI_DFN5	Key Performance Indicators, KPI Definition, KPIs, Attributes	Associate user-defined fields with a KPI.
KPI Definition - Notes	KP_KPI_DFN4	Key Performance Indicators, KPI Definition, KPIs, Notes	Enter detailed notes about a KPI.
KPI Calculation Rule	KP_CALC_RULE	• Key Performance Indicators, Administration, Building Blocks, Calculation Rules • From the KPI Definition page, click the Calculation link in the Associated Objects group box.	Define how to compute the value for a calculated KPI by associating a calculation ID with a KPI. Also associates models with KPIs. This page is not available for composite KPIs or manual KPIs, because calculation rules do not apply to them.
Dimension Members	KP_KPI_OBJ_EFF	• Key Performance Indicators, Administration, Building Blocks, Dimension Members • From the KPI Definition page, click the Dimension Members link in the Associated Objects group box.	Define the subset of dimension members that make up a KPI. For example, if the KPI dimension is business unit, you indicate which specific business units should be calculated and assessed. You can indicate which dimension members to include either by using a constraint-based rule or by specifying each member.
Get Dimension Members	KP_KPI_OBJ_GET	On the Dimension Members page, select the Constraints tab, and then click Preview.	Enter criteria to retrieve the KPI dimension members.
Preview Object IDs	KP_KPI_OBJ_PREVIEW	On the Get Dimension Members page, click Run Query.	Review the subset of KPI dimension members that are defined by the Dimension Members page for a specified business unit, scenario, fiscal year, and period.
Target Rules	KP_TRGT_RULE	• Key Performance Indicators, Administration, Building Blocks, Target Rule • From the KPI Definition page, click the Targets and Assessment Rules link in the Associated Objects group box.	Establish the target rules by which KPI dimension members are scored.

Page Name	***Definition Name***	***Navigation***	***Usage***
Copy to Dimension Members	KP_COPY_TRGT_RLE	From the Target Rules page, click Copy to Dimension Members.	Copy target rules to all of the dimension members for a KPI. This page is available only when you select dimension members individually; it is not available when dimension members are defined by a rule.
Cause and Effect	KP_CAUSE_EFFECT	• Key Performance Indicators, Administration, Building Blocks, Cause and Effect • From the KPI Definition page, click the Cause and Effect link in the Associated Objects group box.	Establish causal relationships among KPIs.
Composite KPI	KP_CMPSTE_EFF	• Key Performance Indicators, Administration, Building Blocks, Composite KPIs • From the KPI Definition page, click the Composite link in the Associated Objects group box.	Define composite KPIs.
KPI Family	KP_KPI_FAMILY	• Key Performance Indicators, KPI Definition, KPI Families • On the KPI Definition page, expand the KPI Family group box and click either Create a New Family or Add KPIs to Existing Family.	Establish families in which to group related KPIs.

Understanding the KPI Definition Component

Use the KPI Definition component to define all aspects of a KPI, including:

- How the KPI's values are determined.
- The individual dimension members that it evaluates.
- The target values and associated assessments.

The KPI Definition component contains links to all of the pages that are used to define objects that are associated with a KPI. This enables you to quickly navigate to all of the pages required to set up a KPI.

KPI Definition Page

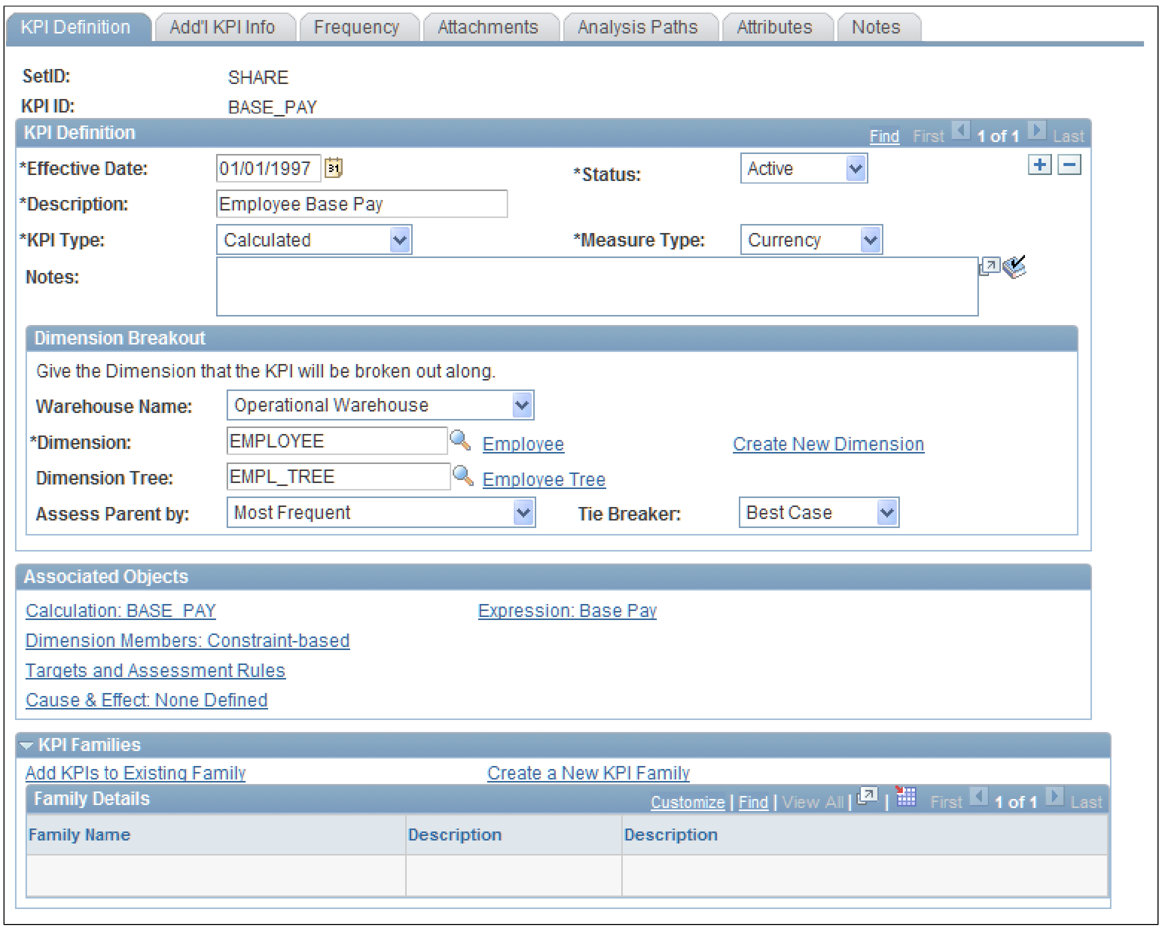
Use the KPI Definition page (KP_KPI_DFN) to define a KPI and specify how to determine its value and the dimension upon which it is based.

Navigation

Key Performance Indicators, KPI Definition, KPIs, KPI Definition

Image: KPI Definition page

This example illustrates the fields and controls on the KPI Definition page. You can find definitions for the fields and controls later on this page.



Copy From

Click to access the KPI Copy page, on which you can specify a KPI to copy into the KPI that you are currently defining. The system copies the KPI definition fields from that KPI into this page. This option is available only in Add mode prior to saving the KPI definition.

KPI Definition

KPI Type

Select the method by which the system determines the value for the KPI. Options are:

Calculated: Computes the value using a defined calculation. If you select this option, you must also specify the calculation ID by using the KPI Calculation Rule page.

Composite: Uses the results from multiple KPIs to determine the value for this KPI.

Derived: Determines the value by using the KPI results from a previous processing run for either a different KPI, or for the same KPI, but using a different time period, scenario, or business unit. If you select this option, you must also specify the source KPI and the derivative options by using the KPI Calculation Rule page.

Manual: Uses manually entered values for this KPI. Typically, you select this options when the information that the KPI measures is not available in the PeopleSoft EPM database. The actual KPI values are entered by using one of the Manual KPI pages. Target rules are still used for manual KPIs, and the KPI is assessed during processing if target rules exist.

Note: Any KPI that is a source for a derived KPI must be previously calculated.

Measure Type

Select the type of value that this KPI represents. Your selection controls how the system displays the value. Options are:

Number: Use for general values.

Currency: Use for monetary values. The system formats these values using the appropriate currency code and number of decimals.

Percentage: Use for values that represent a percentage. The system formats these values with a percentage sign after the amount.

Dimension Breakout

Warehouse Name

Select the warehouse that is the source of data for this KPI. Values are:

Operational Warehouse

Multi-Dimensional Warehouse

Dimension

Specify the dimension by which to resolve this KPI. On subsequent pages, the system limits field selections to members from only this dimension.

Note: You should not change the dimension for an established KPI; if you do, you must redefine the calculation rule, the dimension members, and the target rules because they are no longer valid.

Dimensions are defined in PeopleSoft EPM.

See "Defining and Maintaining Dimensions *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*".

Dimension Tree

Optionally, specify the tree that defines the hierarchical relationship of the dimension used for the KPI. This enables you to view the KPI results distributed and aggregated according to the hierarchy by using the KPI Hierarchy page. This field is unavailable for entry if the KPI Type field is set to composite. You can't specify a dimension tree for composite KPIs.

Assess Parent By

If you use a dimension tree, select the method by which the system assesses parent nodes. Options are:

Best Case: Uses the best score attained by any node in the level directly beneath it.

Worst Case: Uses the worst score attained by any node in the level directly beneath it.

Most Often: Uses the most frequently occurring score attained by the node in the level directly beneath it.

Tie Breaker

If you use a dimension tree, specify how to determine the assessment for parent nodes if the assessments for subordinate nodes results in a tie (no single assessment is received more often than any others– for example, equal numbers of multiple assessments, such as two greens and two reds). This field is available for entry only when the Assess Using field is set to *Most Often.* Options are:

Best Case: Select to use the best assessment result.

Worst Case: Select to use the worst assessment result.

Associated Objects

Use the links within this group box to access the pages used to define or revise the various associated objects for a KPI. The available links depend on the KPI type. For most of these links, the link text is a combination of a description of the object that is defined by the page that you access, and either a description of the currently defined object or the text "None Defined" if that object has not yet been associated with the KPI.

Calculation: None Defined or Calculation: <description>

Click to access the KPI Calculation Rule page, where you can establish, review, or modify the KPI's calculation rule, which associates a calculation expression with the KPI. This link is available only for calculated or derived KPIs; it does not

	appear for manual or composite KPIs. Because calculation rules are defined by model, the system prompts you for the model ID if you are either adding a calculation rule or updating the rule when more than one model exists. Otherwise, it transfers directly to the KPI Calculation Rule page.
Expression: or Expression: <description>	Click to access the Calculation page, where you can establish, review, or modify the expression used to calculate the KPI. This link is available only for calculated KPIs. It does not appear until a calculation rule is associated with the KPI.
Composite: None Defined or Composite: Based on <number> KPIs	Click to access the Composite KPI page, where you can establish which KPIs comprise the composite KPI, or review and modify the existing definition. This link is available only for composite KPIs. It does not appear for calculated, manual, or derived KPIs.
Derived	Click to access the KPI Calculation rule page, where you can establish how to derive the value for this KPI, or review and modify the existing definition. This link is available only for derived KPIs. It does not appear for manual, composite, or calculated KPIs.
Manual	Click to access the Manual KPI Values page, where you can enter or update the values for the KPI. This link is available only for manual KPIs.
Dimension Members: Not Defined, Dimension Members: Constraint Based, or Dimension Members: Individually Selected.	Click to access the Dimension Members page, where you can establish which dimension members to include in this KPI, or review and modify the existing definition.
Targets and Assessment Rules: None Defined or Targets and Assessment Rules	Click to access the Target Rules page, where you can add or update target values for the KPI dimension members. This link is not active until dimension members are defined. Because target rules are defined by dimension member and model, you must complete a search page to specify the model and dimension member before you can access the Target Rules page .
Cause and Effect: None Defined or Cause and Effect	Click to access the Cause and Effect page, where you can identify cause and effect relationships for the KPI.

KPI Families

Expand this group box to view the families to which this KPI belongs.

Add KPIs to Existing Family	Click to access the KPI Family page in Update/Display mode, where you can add KPIs to an existing family.
Create a New KPI Family	Click to access the KPI Family page in Add mode, where you can define a new KPI family.

Related Links

Understanding the Scorecard and KPI Monitoring Pages

Defining KPI Building Blocks

Maintaining KPI Values

KPI Copy Page

KPI Definition - Additional KPI Information Page

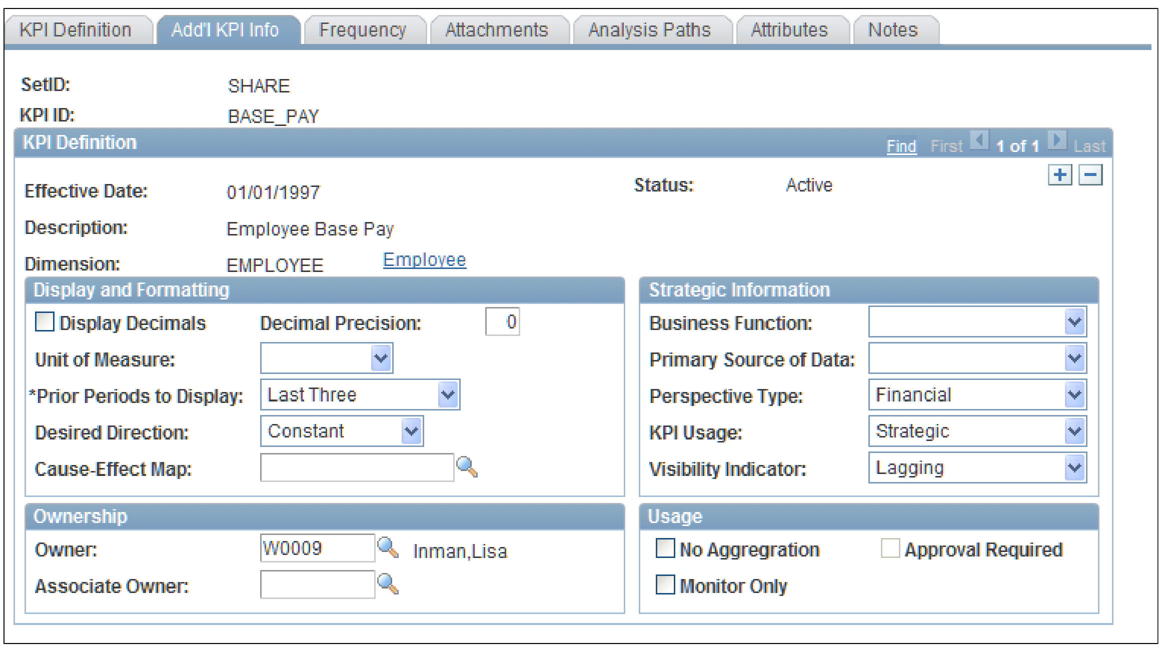
Use the KPI Definition - Additional KPI Information page (KP_KPI_DFN1) to define a KPI's owner and specify display and formatting options, various strategic information, aggregation options, and options related to how it is used.

Navigation

Key Performance Indicators, KPI Definition, KPIs, Add'l KPI Info

Image: KPI Definition - Add'l KPI Info page

This example illustrates the fields and controls on the KPI Definition - Add'l KPI Info page. You can find definitions for the fields and controls later on this page.



Display and Formatting

Display Decimals

Select to enable the system to display decimals for KPI values. This determines whether decimals appear when viewing KPI results on the various scorecard and KPI view pages.

Decimal Precision

Enter the number of decimal places to use. The system truncates the value to the number of decimals specified.

This field applies only to KPIs with a measure type of *Number* or *Percentage.* The decimal precision for currency measure types is determined by the currency code definition in PeopleSoft EPM.

Warning! This field determines the stored value for a KPI. For example, if the KPI calculates to 23.456 and you set display decimals to 1, the system stores 23.5 as the resolved value, not 23.456. The system rounds the value before truncating it.

Unit of Measure

Select the unit of measurement that this KPI's value represents.

This applies only to KPIs with a measure type of *Number.* Units of measure are established in PeopleSoft EPM.

Prior Periods to Display

Select how many historical periods of assessment results appear on the scorecard for this KPI. Options are: *Current, Last Six Periods, Last Thirteen Periods,* or *Last Three Periods.*

Desired Direction

Select whether the preferred trend for this KPI over time is to *Increase, Decrease,* or remain *Constant.*

This information appears on various scorecard pages.

Cause-Effect Map

Select the image that represents the cause and effect relationship for this KPI. This appears on the KPI Detail - Strategy Map page.

You must create the image in another application and add it to the image repository using PeopleSoft Application Designer for it to appear as a choice.

Ownership

Owner

Specify the individual that is primarily responsible for this KPI by selecting an employee ID from the list.

The owner fields determine which KPIs an individual views on the My KPIs page. If you are identified as an owner or associate owner for a KPI, that KPI will appear on the My KPIs page, based on the user ID that you use when signing in to the system.

Associate Owner

Specify an additional owner, if applicable, by selecting an employee ID from the list.

Strategic Information

Business Function

Select the functional category that applies to this KPI.

This information appears on various scorecard pages.

Primary Source of Data

Select the PeopleSoft application that is the KPI's main source of data.

Subscribing applications use this information to retrieve published KPIs based on their source.

Perspective Type

Select the scorecard perspective within which this KPI belongs.

The scorecard uses this field to provide a view of KPIs by perspective. A value of *Multiple* indicates that the KPI can apply to more than one of the other perspectives.

You can define additional perspectives to suit your needs.

See (Optional) Establishing Additional Perspectives.

KPI Usage

Select whether the primary KPI usage is *Operational* or *Strategic.*

This information appears on various scorecard pages.

Visibility Indicator

Select the category of performance measured by this KPI. The visibility indicator is used for information only. Options are:

Leading: The KPI is an indicator of future performance.

Lagging: The KPI is an indicator of past performance.

Both: The KPI is an indicator of both past and future performance.

Usage

No Aggregation

Select to prevent this KPI's values from being aggregated to create totals, such as in a business unit or scenario roll up process, or in determining quarter-to-date and year-to-date amounts.

This option should be selected if the KPI values represent an aggregate, such as an average or percentage, because adding aggregate values would result in a mathematically inaccurate total.

To enter quarter-to-date and year-to-date values for these types of manual KPIs, use the Manual KPI page.

Approval Required

Select to enable comments approval workflow for this KPI.

This field is unavailable for entry if the Approval Required option is not selected for this SetID on the System Options page.

See System Options Page.

Monitor Only

Select to prevent the system from assessing this KPI.

The system still calculates the KPI values (unless it is a manual KPI), and they appear on the scorecard so you can monitor the results. However, the KPI isn't assessed, and doesn't affect the assessment of any of the strategy components to which it is associated. Later, you can clear the check box if you want the system to assess the KPI. KPIs marked as monitor only receive an assessment ID of MONITOR.

KPI Definition - Frequency Page

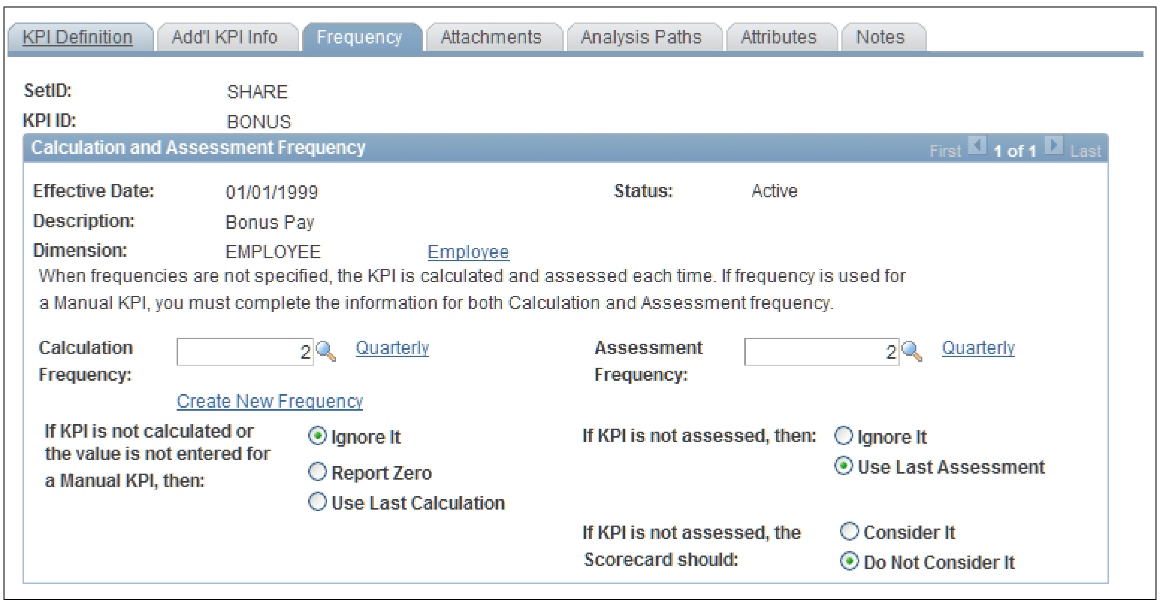
Use the KPI Definition - Frequency page (KP_KPI_DFN6) to define KPI calculation and assessment frequency.

Navigation

Key Performance Indicators, KPI Definition, KPIs, Frequency

Image: KPI Definition - Frequency page

This example illustrates the fields and controls on the KPI Definition - Frequency page. You can find definitions for the fields and controls later on this page.



To understand the effect of the frequency settings, you need to understand the tables that are affected. When you process KPIs, the system populates KP_KPI_CALC_F00, for *both* calculated and manual KPIs. A value must exist in KP_KPI_CALC_F00 for the system to assess a KPI, because the KP_KPI_CALC_F00 table is the source table for processing KPIs. When the system assesses KPIs, it stores the results in KP_KPI_ASMT_F00. If no value exists in KP_KPI_CALC_F00 for a KPI, when the system assesses the KPI, it assigns UNKNOWN for that KPI.

When you process scorecards, the system stores results in BC_ASSESS_F00.

For calculated KPIs, when you process KPIs the system resolves the KPI values and stores the results in KP_KPI_CALC_F00.

Manual KPI values are neither calculated nor resolved; you enter their values in the manual KPI table by using the Manual KPI page. When you process KPIs, the system retrieves the data from the manual KPI table (for the period being processed), and stores those values in KP_KPI_CALC_F00. During KPI processing, if no data exists in the manual KPI table, then the system either ignores the KPI, uses zero, or uses the last stored value in KP_KPI_CALC_F00, according to how you set those options. Because the system does not use these options unless a calculation frequency is specified, you must specify a calculation frequency for manual KPIs if you specify an assessment frequency to guarantee that there is a value in KP_KPI_CALC_F00 to assess. If you want to enter and assess an actual value for a manual KPI that does not fall within the specified calculation frequency, change the calculation frequency accordingly.

For calculated KPIs, you can specify a calculation frequency, an assessment frequency, or both. Frequencies are established by using the Frequency Definition page.

See "Frequency Definition Page *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*".

To define frequencies for calculating or assessing KPIs that measure period-sensitive information:

1. Select the calculation frequency (required for manual KPIs, optional for calculated KPIs), and then indicate how the system should treat the KPI when processing occurs in a time frame outside of the defined frequency.

   This table explains each option:

Option	***Populates KP_KPI_CALC_F00***	***Effect***
Ignore It	No	No value is calculated. If assessment takes place, the system returns UNKNOWN.
Report Zero	Yes, and the resolved value is set to zero.	If assessment takes place, the system uses zero as the value to compare to target.
Use Last Calculation	Yes, and the resolved value is set to the resolved value from the prior calendar period. If no value exists for the prior calendar period, then the KPI does not have a value.	If assessment takes place, the system compares the most recent calculation value to the target.

2. Select the assessment frequency (if nothing is selected, assessment always occurs), then indicate how the system should treat the KPI when processing occurs during a time frame that is outside of the defined frequency.

   The following table explains each option:

Option	***Populates KP_KPI_ASMT_F00***	***Effect***
Ignore It	No	No assessment takes place.
Use Last Assessment	Yes	Uses the prior calendar period assessment, regardless of the calculation results.

3. Select the scorecard impact if a KPI is not assessed.

   The following table explains each option:

Option	***Populates BC_ASSESS_F00***	***Effect***
Consider It	Yes	The strategy components with which this KPI is associated take the KPI results into account. The assessment method for the component determines the effect on the component's score.
Do Not Consider It	No	The strategy components with which this KPI is associated disregard the KPI. It does not affect their score.

<calculation frequency description>, <assessment frequency description>, and Create New Frequency

Click to access the Frequency Definition page, where you can set up frequencies.

Defining Optional KPI Attributes

The remaining pages within the KPI Definition component are optional.

(Optional) Associating Attachments

Access the KPI Definition - Attachments page (Key Performance Indicators, KPI Definition, KPIs, Attachments).

Associating an attachment to a KPIs is similar to adding an attachment to an email, in that when you view the KPI results, you can open the attachment to view the information that it contains. If a KPI has attachments associated with it, an Attachments icon appears on the various pages that display KPI results. When you click the attachments icon, the system lists the report IDs that have been associated with the KPI. Click a report to launch it. The attachment can be any file type that you can access with a URL, including streaming video, audio, and websites. For example, you could enable employees to view a video of an executive from your organization. Report IDs must be set up in PeopleSoft EPM prior to selecting them.

Note: PeopleSoft recommends that attachments use reports that are static in nature, because report IDs are defined by report metadata, and that metadata must be updated whenever a report is modified.

Report ID

Select a file to associate with this KPI.

This file must be established in the reports metadata table (PF_ META_RPT_TBL).

See "Setting Up Report Metadata *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*".

In the report metadata setup, the report launch path should always be a URL, not the physical path to the file. For example, these are valid URL entries:

- http://mydomain/reportpath/myfile.type
- http://www.peoplesoft.com/reports/myreport.xls

- ftp://ftpserver/reportpath/myfile.type
- ftp://ftp.peoplesoft.com/reports/myreport.xls
- gopher://gopherserver/reportpath/myfile.type
- gopher://gopher.peoplesoft.com/reports/myreport.xls

(Optional) Assigning Analysis Paths

Access the KPI Definition - Analysis Paths page (Key Performance Indicators, KPI Definition, KPIs, Analysis Paths).

Tree Name

Select the tree that depicts the KPI hierarchy.

When you view this KPI on the scorecard, you can navigate through this tree to view this KPI's relationship with other KPIs as an aid to analyzing its performance.

Note: For you to view the analysis path on the scorecard, the current KPI must be included as a node on this tree.

(Optional) Associating Additional Fields

Access the KPI Definition - Attributes page (Key Performance Indicators, KPI Definition, KPIs, Attributes).

Attribute 1-7

Enter information in the attribute fields if additional information about the KPI is available that you want to track. These are free-form fields for storing additional attributes that apply to an implementation. No functionality is provided for these fields at this time; however, you can use them to filter data in queries or reports that you create. For example, you might enter category or priority information. You can configure this page in Application Designer to make the field labels more descriptive.

Publish as web service

Select this option to permit the system to publish this KPI's data in XML format. This enables the KPI to be accessed by web-service-compliant applications by using PeopleTools Integration Broker.

KPI Calculation Rule Page

Use the KPI Calculation Rule page (KP_CALC_RULE) to define how to compute the value for a calculated KPI by associating a calculation ID with a KPI.

Also associates models with KPIs. This page is not available for composite KPIs or manual KPIs, because calculation rules do not apply to them.

Navigation

- Key Performance Indicators, Administration, Building Blocks, Calculation Rules
- From the KPI Definition page, click the Calculation link in the Associated Objects group box.

Image: KPI Calculation Rule page for a calculated KPI

This example illustrates the fields and controls on the KPI Calculation Rule page for a calculated KPI. You can find definitions for the fields and controls later on this page.

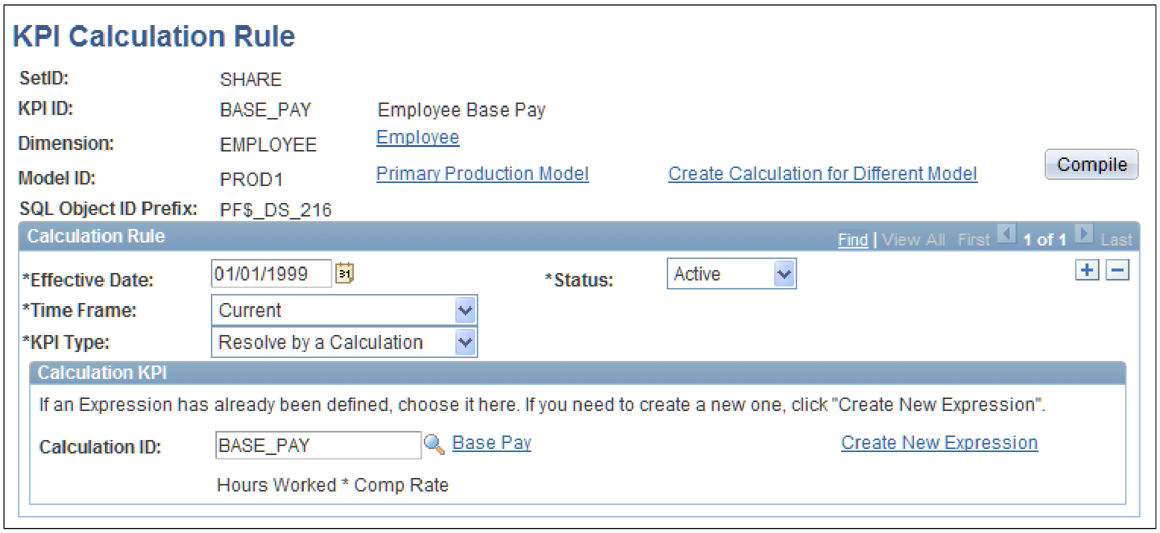
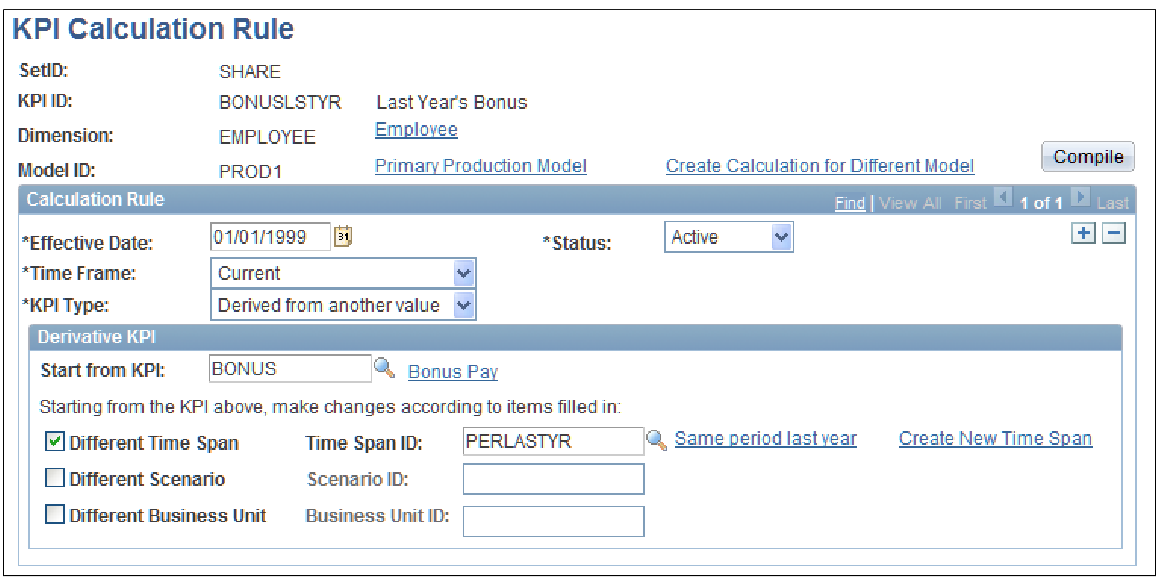


Image: KPI Calculation Rule page for a derived KPI

This example illustrates the fields and controls on the KPI Calculation Rule page for a derived KPI. You can find definitions for the fields and controls later on this page.



This page differs depending on whether the KPI is a derived KPI or a calculated KPI. The fields that are on this page define how to compute a KPI's value; they do *not* apply to manual KPIs. This page requires a model ID as an additional key field for the purpose of associating the KPI calculation rule with a particular model. That is why this page is not part of the KPI Definition component.

Calculation rules can either be based on calculations that you have established using the Calculations - Definition page, or be derived from another KPI. If the KPI is derived from another KPI, you can vary some of the parameters that are used for this calculation.

Time Frame	Select the time period to use when calculating the KPI's value. Options are: *Current Accounting Period:* Calculates the KPI using the data from the current accounting period. Typically you select this option. *Year To Date:* Calculates a running total for the current fiscal year. For example, you might select this option if you are planning to use this KPI in a calculation expression for another KPI. This option does not compute quarter-to-date results.
Compile	If you modify the calculation ID on which this KPI is calculated, click this button to update the associated SQL, because the Save button won't be active. To ensure that you update all KPI-related SQL, run the PeopleSoft EPM mass compile utility. See "Running Mass Compile *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*".

Specifying Parameters for a Calculated KPI

These fields appear when the KPI Type field is set to *Resolve by a Calculation.*

Calculation ID	Select the calculation ID to resolve this KPI's value.
<calculation description>	Click to access the Calculation page in Update/Display mode, where you can review the calculation definition.
Create New Expression	Click to access the Calculation page in Add mode, where you can establish a new calculation definition and assign it to this KPI.

Specifying Parameters for a Derived KPI

These fields appear when the KPI Type field is set to *Derived from another value.*

Start from KPI	Specify the KPI from which to derive this KPI's values (the source KPI).
<derived KPI description>	Click to access the KPI Definition page for the source KPI, where you can review its definition.
Different Time Span and Time Span ID	Select to use a different period of time. Enter the time period in the Time Span ID field.

<timespan description>	Click to access the Timespan page, where you can review the timespan definition.
Create New Time Span	Click to access the Timespan page in Add mode, where you can create a new timespan definition.
Different Scenario and Scenario ID	Select to use a different scenario. Enter the scenario in the Scenario ID field. This enables you to use a different scenario for the KPI than the one selected in the run control parameters.
<scenario description>	Click to access the Scenario Definition page, where you can review the scenario definition.
Different Business Unit and Business Unit ID	Select to use a different business unit. Enter the business unit in the Business Unit ID field. This enables you to use the value of the KPI from a specific business unit during processing rather than the one selected in the run control parameters.
<business unit description>	Click to access the Warehouse Business Unit page, where you can review the business unit definition.

You do not need to define any metadata, a data element, or a calculation definition for a derived KPI; you need only to define the KPI definition (using a KPI type of *Derived from another value*), calculation rule, KPI dimension members, and target rules.

Dimension Members Page

Use the Dimension Members page (KP_KPI_OBJ_EFF) to define the subset of dimension members that make up a KPI.

For example, if the KPI dimension is business unit, you indicate which specific business units should be calculated and assessed. You can indicate which dimension members to include either by using a constraint-based rule or by specifying each member.

Navigation

- Key Performance Indicators, Administration, Building Blocks, Dimension Members
- From the KPI Definition page, click the Dimension Members link in the Associated Objects group box.

When you access this page, specify whether to define the KPI dimension members by a rule, or by individual object IDs. The format of this page differs depending on your selection.

Image: Dimension Members page, rule-based members

This example illustrates the fields and controls on the Dimension Members page, rule-based members. You can find definitions for the fields and controls later on this page.

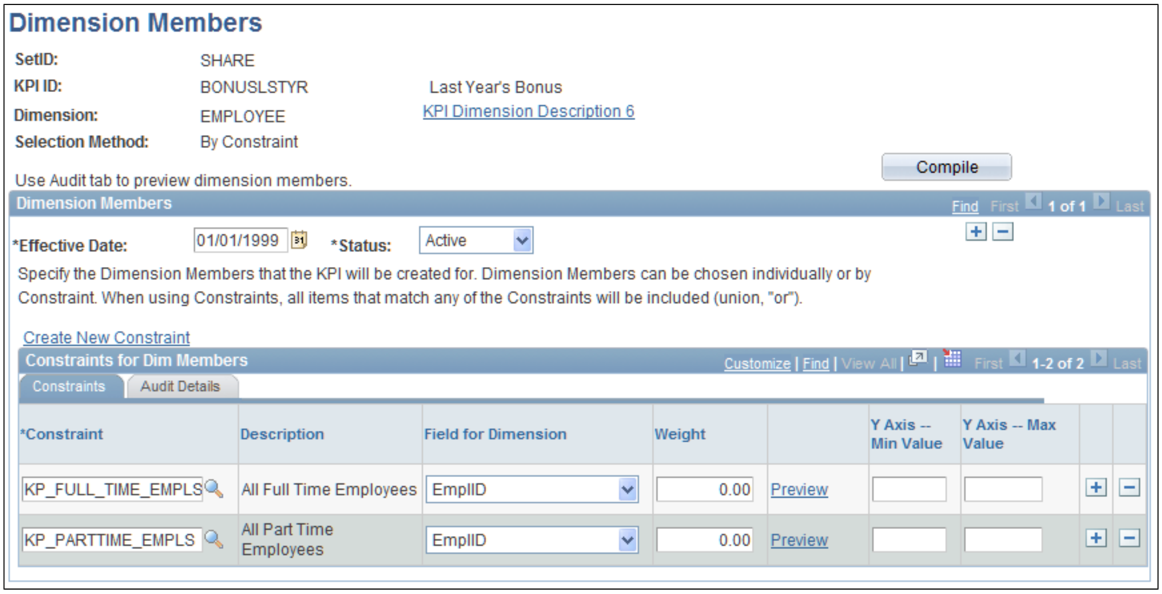
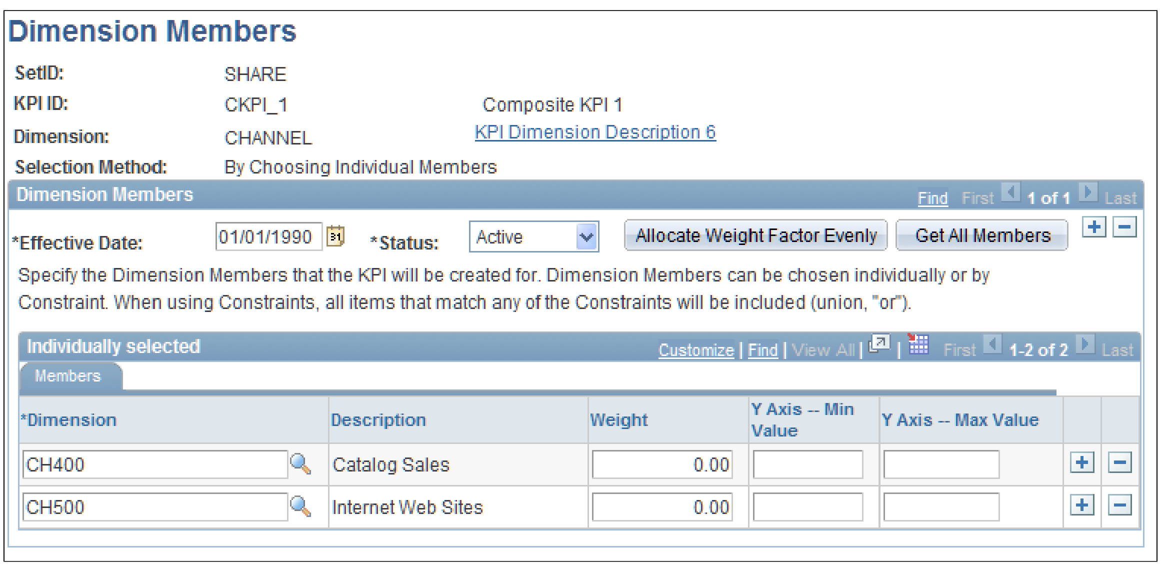


Image: Dimension Members page, individually selected members

This example illustrates the fields and controls on the Dimension Members page, individually selected members. You can find definitions for the fields and controls later on this page.



Establishing KPI Dimension Members by Using a Rule

Create New Constraint — Click to access the Constraint definition page in Add mode, where you can create a new constraint to associate with this KPI.

Constraint

Select the constraint ID to define the rule by which the KPI members are determined. Add rows to specify multiple rules.

Field for Dimension

Select the field within the constraint definition that contains the dimension members.

Preview

Click to transfer to the Get Dimension Members page, where you can review the dimension members defined by the rule for a specific business unit, scenario ID, fiscal year, and accounting period. Click Run Query to view the results on the Preview Object IDs page. Click Return to KPI Dim Members to return to the Dimension Members page.

Select the Audit Details tab to view details about the rule.

Establishing KPI members by ID

To specify each KPI dimension member individually, either insert each ID by selecting it or click Get All Members to retrieve every dimension member, and then delete any members that you don't want to include.

(Optional) Defining Weight Factors

Weight

If you use weighting, enter a weight factor for each dimension member.

For non-rule-based dimension members, you can click Allocate Weight Factor Evenly to automatically populate the weight factors evenly among all of the dimension members.

For rule-based dimension members, the weight factor that you assign for a rule is divided by the number of dimension members included in that rule, distributing the allocation evenly among all members. The total of all the weight factors must equal 100. Weight factors don't appear for business unit dimension members, because they are not applicable.

(Optional) Defining Chart Controls

Y Axis Min Value and Y Axis Max Value

Enter the minimum and maximum Y axis values used for a dimension member.

These settings enable you to control the y-axis scale for charts. Otherwise, a dimension member whose value is outside of the typical values for this KPI could result in a chart that displays, for example, very small bars for the majority of the objects. If you don't enter y-axis values, the system uses the maximum and minimum resolved values of all the KPI dimension members. If you enter y-axis values for rule-based KPI dimension members, the values apply to all the dimension members defined by the constraint.

Related Links

Assessment Methods

Target Rules Page

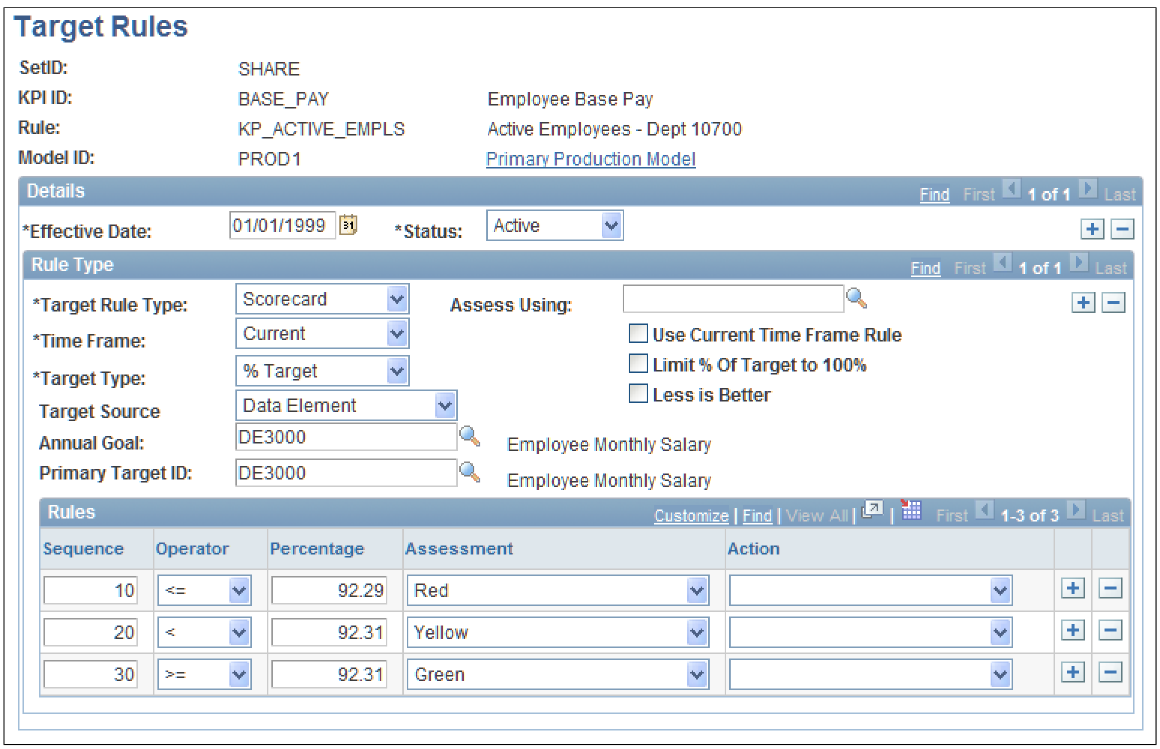
Use the Target Rules page (KP_TRGT_RULE) to establish the target rules by which KPI dimension members are scored.

Navigation

- Key Performance Indicators, Administration, Building Blocks, Target Rule
- From the KPI Definition page, click the Targets and Assessment Rules link in the Associated Objects group box.

Image: Target Rules page

This example illustrates the fields and controls on the Target Rules page. You can find definitions for the fields and controls later on this page.



If the KPI dimension members are based on a rule, then a single target rule is used for all the KPI dimension members within the rule. To access the page, you must specify the rule for which you are defining targets.

If the KPI dimension members are not based on a rule, then each one must be assigned a target rule. To access the page, you must specify the dimension member for which you are defining targets.

Copy To Dimension Members	Click to copy the current target rule to other dimension members that do not have a defined rule. This button appears only for KPIs with individually specified dimension members.

On the page that appears, select the members to receive the rule, and then click OK.

Defining Rule Types

Target Rule Type

Select the type of rule to define. Options are:

Workforce: Select if the target rule is for use with PeopleSoft Workforce Analytics.

Scorecard: Select if the target rule is for use with if this target rule is for use with PeopleSoft Scorecard.

Time Frame

Specify the time frame to which this rule applies. Options are:

Current: Select to apply the rule to amounts for the current period.

QTD (quarter-to-date): Select to apply the rule to amounts for the current quarter.

YTD (year-to-date): Select to apply the rule to amounts for the current year.

If you want assessments for quarter-to-date and year-to-date amounts, you must insert additional rules for those time frames.

Target Type

Select the method by which the system compares the KPI dimension members to their targets. The option that you select controls how you define the rules and the fields that are available for entry in the Rules grid. Options are:

% Target (percentage target): Compares whether a KPI dimension member is within a specified percentage of its target. The target is specified in the Primary Target ID field, and the value of that target is equivalent to 100 percent. The system computes the percentage amounts. When you select this option, you must also complete the Target Source field.

Data Elem (data element): Uses data elements for the target values. This option enables you to compare the value of the KPI dimension member to the value of a data element. When you select this option, the target IDs in the Rules grid are data element IDs.

KPI: Uses KPIs for the target values. This option enables you to compare the value of the KPI dimension member to the value of a different KPI. When you select this option, the target IDs in the Rules grid are KPI IDs.

Numeric: Uses a numeric value as the targets. This option enables you to compare a KPI dimension member to an entered numeric value. When you select this option, the targets in the Rules grid are numbers that you enter.

Target Source	Specify from where to derive the values for the Annual Goal and Primary Target ID fields. The Target Source field is available only when the Target Type is *% Target.* This field controls the prompt tables that are used for the Annual Goal and Primary Target ID fields. Options are: *Default Target Table:* Select to use the default target table as the source of the target values. If you select this option, the system automatically populates the Annual Goal and Primary Target ID fields with *DFLT_TRGT* and they are unavailable for entry. *Data Element:* Select to use data elements as the source for target IDs. If you select this option, the prompts for the Annual Goal, Primary Target, and Target ID fields display valid data elements of the same dimension as the KPI for which you are defining the target rule. . *KPI:* Select to use KPIs as the source for target IDs. If you select this option, the prompts for the Annual Goal, Primary Target, and Target ID fields display valid KPIs of the same dimension as the KPI for which you are defining the target rule.
Manual Targets	Click to access the KPI Targets page, where you can enter target values for the KPI. This link is available only when the Target Type field is set to *%Target* and the Target Source field is set to *Default Target Table.*
Annual Goal	Specify the annual goal for this KPI dimension member. Depending on the target type, you either select a data element or a KPI, or you enter the number directly. If you use the default target table, then this value comes from that table.
Primary Target or Primary Target ID	Specify the primary target amount for this KPI dimension member. The system uses this value as the equivalent of 100 percent of target. It is used as the denominator when the system calculates the percentage of target. Depending on the target type, you either select a data element or a KPI, or you enter the number directly. For *% Target* target types, the value in the Target Source field determines whether you select a data element or KPI. Any data element that is used must be a pointer. For *Numeric* target types, this field is optional and you enter a value. If you use the default target table, then this value comes from the appropriate period's target from that table.
Assess Using	Select this check box to use the values from a different KPI to compare to the targets. Select this option when you want the assessment for this KPI dimension member to be based on another KPI's value—for example, to base customer satisfaction

on on-time delivery. The value for on-time delivery is compared against this set of target rules (not the value of customer satisfaction).

Use Current Time Frame Rule

Select this check box to use the rule that has been established for the *Current* time frame for your quarter-to-date and year-to-date rules as well.

Limit % of Target to 100%

Select to limit the maximum attainable value for percent of target to 100 percent. In cases in which the percent of target is greater than 100 percent, the system uses 100% as the result.

Less is Better

Select to indicate that lower values are favored over higher values. The system uses this setting to determine the trend.

Defining Target Rules

In the Rules section, insert rows as needed to designate the range of values that receive a particular assessment. The fields that you need to define for a rule depend on the target type that is used, as listed in this table:

Target Type	***Target Rule Fields Used***
% Target	Sequence, Operator, Percentage, Assessment, Action
Data Element and *KPI*	Sequence, Operator, Target ID, Assessment, Action
Numeric	Sequence, Operator, Target, Percentage, Assessment, Action

Sequence

Enter a number to associate with each target rule. The system evaluates the rules in ascending order based on this sequence number, not their order in the list. The system uses the row that contains the first true condition as the assessment. Leave numerical intervals between your sequence numbers so that you can insert additional rules later, if necessary, without having to renumber each row.

Operator

Select the type of comparison (greater than, less than, and so on).

Target ID and Target

Select the item to which the KPI dimension member is being compared. This can be either a data element, a number, or a KPI depending on the target type. If you use the default target table, the default value for this field is *DFLT_TRGT.* Any data elements or KPIs that are used for the target ID must be based on the same dimension type and use the same unit of measure as the KPI for which the rule is being defined.

Percentage

Select the percentage of target that the dimension member is within. (Applies only to *% Target* target types.)

Assessment

Select the assessment ID to assign if the condition is true.

Action (Optional) Select the action ID to use if the condition is true.

Note: Insert additional rule types to assess results for quarter-to-date and year-to-date amounts.

Target Rule Examples

This table shows target rule values for a *Numeric* target type:

Sequence	***Operator***	***Target***	***Assessment***
10	<	1	Red
20	<	2	Yellow
30	>=	2	Green

This table shows target rule values for a *Data Element* target type. DE3000 is the data element to which the actual value is being compared:

Sequence	***Operator***	***Target ID***	***Assessment***
10	<	DE3000	Red
20	=	DE3000	Yellow
30	>	DE3000	Green

This table shows target rule values for a *% of Target* target type. The percentage is determined by the value of the primary target:

Sequence	***Operator***	***Percentage***	***Assessment***
10	>=	75	Red
20	>=	60	Yellow
30	<	60	Green

Special Considerations for Percent of Target

Percent of target must be between -9999.999 and 9999.999. During the assessment process, if the resulting calculation is not within this range, the assessment ID is set to *UNKNOWN,* and percent of target is set to 0. If you review the process messages, you'll see this error message:

"Percent of Target > 9999.999. The calculated percent of target is greater than 9999.99%. Review the target value for this KPI Dimension Member."

In most circumstances, assessment results that are substantially over or under target indicate that something is probably wrong. The system sets the assessment results to UNKNOWN to draw attention to the KPI dimension member so that you can research the issue and determine whether a problem exists. Verify that your target rules are correct and that all of the underlying KPI data exists in the database. If the information in the database is correct, you can override the assessment and enter a comment stating the findings, and then run the BC_OVRASMT jobstream. If the information in the database is incorrect, correct it, and then rerun the BC_ANALYZE jobstream.

Calculating Percent of Target

This table shows how the system calculates percent of target. The system rounds results to two decimal places:

Resolved Value	***Target Value***	***Other Conditions***	***Percent of Target Formula***
> 0	> 0	NA	((RESOLVED_VALUE ÷ TARGET_VALUE) × 100)
<= 0	< 0	resolved value >= target value	((((TARGET_VALUE − RESOLVED_VALUE) ÷ TARGET_VALUE) × 100) + 100)
<= 0	< 0	resolved value < target value	((((TARGET_VALUE − RESOLVED_VALUE) ÷ TARGET_VALUE) × 100) + 100)
> 0	< 0	NA	((((TARGET_VALUE − RESOLVED_VALUE) ÷ TARGET_VALUE) × 100) + 100)
< 0	> 0	NA	((((RESOLVED_VALUE − TARGET_VALUE) ÷ TARGET_VALUE) × 100) + 100)
= 0	> 0	NA	= 0
>= 0	= 0	NA	((RESOLVED_VALUE × 100) + 100)
< 0	= 0	NA	((RESOLVED_VALUE × 100) + 100)

Related Links

KPI Targets Page

Cause and Effect Page

Use the Cause and Effect page (KP_CAUSE_EFFECT) to establish causal relationships among KPIs.

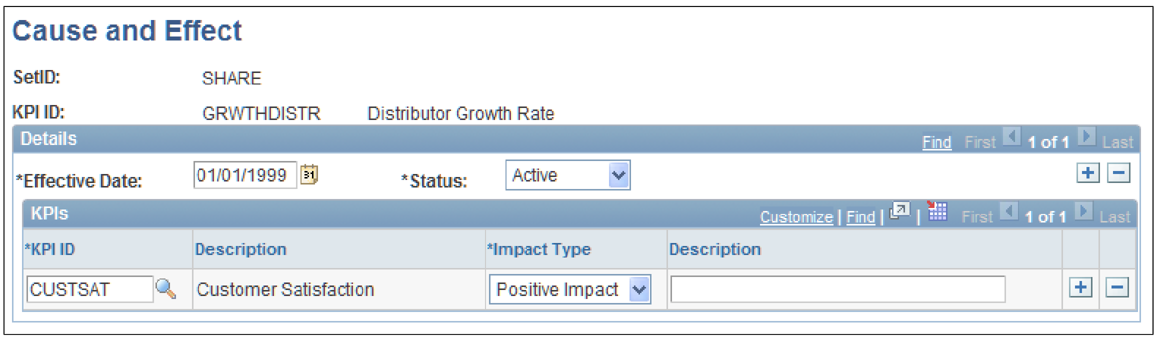
Navigation

- Key Performance Indicators, Administration, Building Blocks, Cause and Effect
- From the KPI Definition page, click the Cause and Effect link in the Associated Objects group box.

Access the Cause and Effect page (Key Performance Indicators, Administration, Building Blocks, Cause and Effect).

Image: Cause and Effect page

This example illustrates the fields and controls on the Cause and Effect page. You can find definitions for the fields and controls later on this page.



Add rows in the KPIs grid and complete these fields to specify which KPIs the current KPI affects as well as to specify the effect that the current KPI has on them:

KPI ID — Select a KPI that is affected by this KPI.

Impact Type — Specify how the selected KPI is affected. Options are:

No Impact: Select if the KPI is related to the current KPI, but isn't directly influenced by the current KPI's outcome.

Positive Impact: Select if the KPI is affected by the current KPI in a positive way.

Negative Impact: Select if the KPI is affected by the current KPI in a negative way.

Note: Any affected KPIs that you include must be associated with a component on the scorecard's strategy tree to be included on the View Cause Effect page.

Composite KPI Page

Use the Composite KPI page (KP_CMPSTE_EFF) to define composite KPIs.

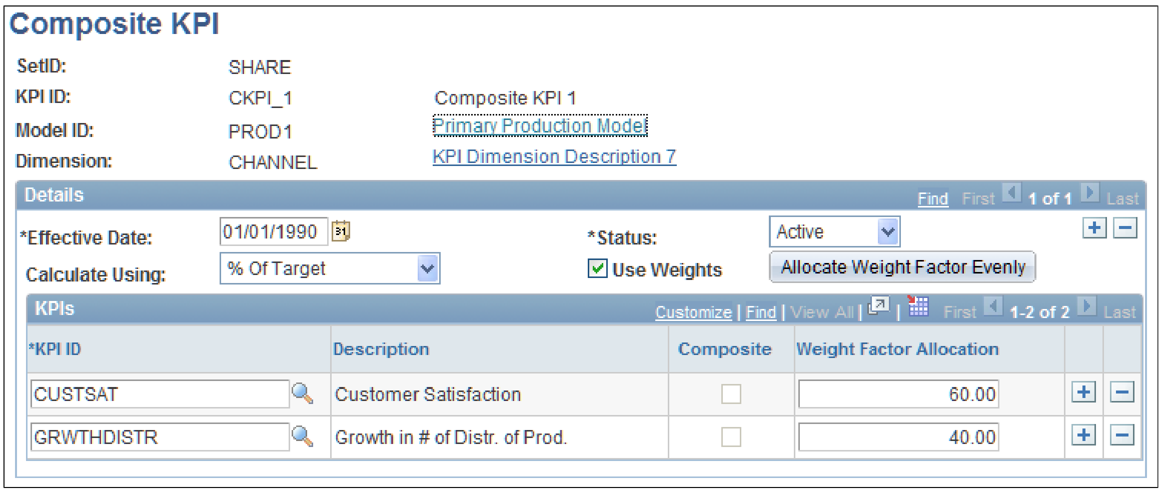
Navigation

- Key Performance Indicators, Administration, Building Blocks, Composite KPIs
- From the KPI Definition page, click the Composite link in the Associated Objects group box.

Access the Composite KPI page (Key Performance Indicators, Administration, Building Blocks, Composite KPIs).

Image: Composite KPI page

This example illustrates the fields and controls on the Composite KPI page. You can find definitions for the fields and controls later on this page.



To define a composite KPI, you must first use the KPI Definition page to create the KPI, and set the KPI Type field value to *composite.*

See KPI Definition Page.

Defining Calculation Options

Calculate Using

Specify how the system determines the value of the composite KPI. Options are:

% of Target: Select to calculate the composite KPI based on the percentage of target of the component KPIs. Use this option with values that are normalized to a scale of 1 to 100.

Resolved Value: Select to calculate the composite KPI based on the resolved value of the component KPIs. Use this option when the KPIs that make up the composite KPI do not use normalized values.

Use Weights

Select to apply weight factors to the KPIs that make up the composite.

Use this option when the KPIs that make up the composite KPI have varying levels of importance.

Allocate Weight Factor Evenly

Click to distribute or redistribute weighting equally by percentage among the KPIs in the grid.

The resulting weighting appears in the grid in the Weighting Allocation column. This option is available only if the Use Weights check box is selected.

Defining the KPIs That Make up the Composite KPI

KPI

Select a KPI ID to add. Valid values depend on the KPI dimension (established on the KPI Definition page).

Weight Factor Allocation

Enter percentages to specify how each KPI contributes to the overall score. The total of the percentages must equal 100.

KPI Family Page

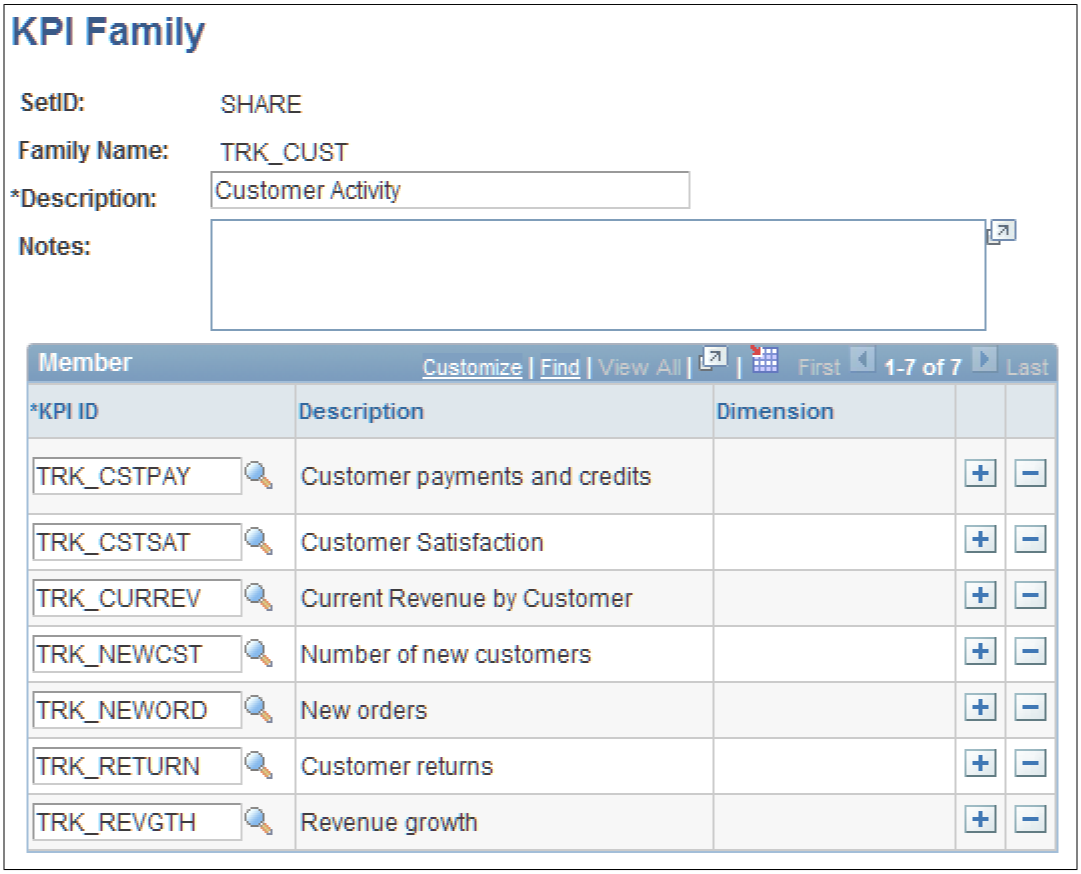
Use the KPI Family page (KP_KPI_FAMILY) to establish families in which to group related KPIs.

Navigation

- Key Performance Indicators, KPI Definition, KPI Families
- On the KPI Definition page, expand the KPI Family group box and click either Create a New Family or Add KPIs to Existing Family.

Image: KPI Family page

This example illustrates the fields and controls on the KPI Family page. You can find definitions for the fields and controls later on this page.



Family Name	Enter the name for this family of KPIs.
Description	Enter a description of the KPI family.

Member

To define the KPI family members, add rows within this grid and select the KPI ID for each member.

KPI Copy Page

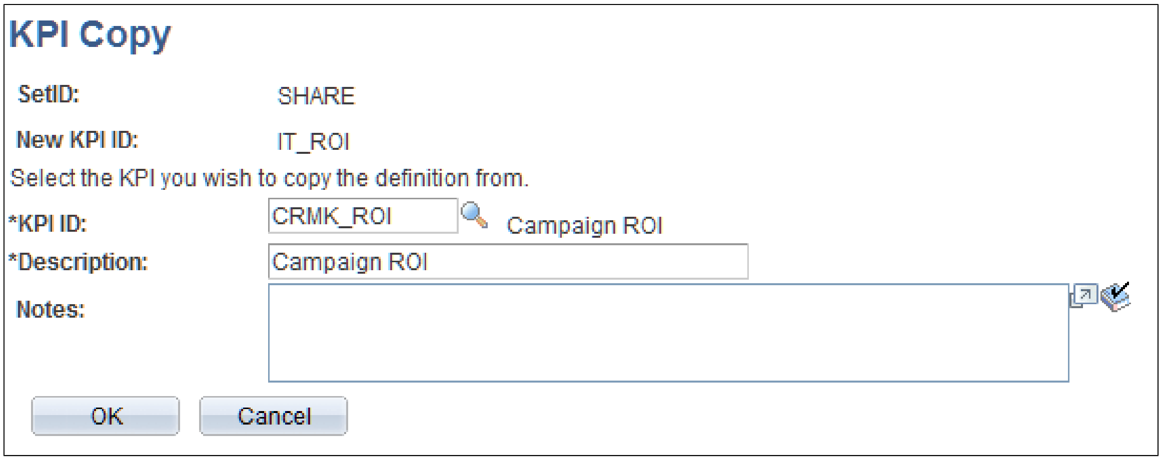
Use the KPI Copy page (KP_KPI_COPY) to copies the fields from another KPI into the current KPI.

Navigation

From the KPI Definition page, click the Copy From link.

Image: KPI Copy page

This example illustrates the fields and controls on the KPI Copy page. You can find definitions for the fields and controls later on this page.



KPI ID

Select the KPI to copy.

Description

Enter the description for the new KPI. The system supplies a default value for this field based on the description of the KPI specified in KPI ID, but you can change it.

Include in Family

In the KPI Families grid, select this check box to include the family in the new KPI definition. This grid appears only if the KPI being copied has families associated with it.

Maintaining KPI Values

To maintain KPI values use the KPI Targets (KP_KPI_MANL_TBL) and KPI Set Target (KP_OBJ_TRGT_RLE) components.

This topic discusses how to:

- Enter values for KPI targets.
- Enter values for manual KPIs.
- Enter values for manual KPIs that you own.

Pages Used to Maintain KPI Values

Page Name	***Definition Name***	***Navigation***	***Usage***
KPI Targets	KP_KPI_MANL_TBL	Key Performance Indicators, Manual Entry, Enter KPI Targets	Enter target values for KPIs.
Manual KPI Values	KP_KPI_MANL_TBL	Key Performance Indicators, Manual Entry, Enter KPI Value	Enter actual values for manual KPIs.
Manual KPIs Search	KP_KPI_MANL_FILTER	Key Performance Indicators, Manual Entry, My Manual KPIs	Enter criteria for viewing manual KPIs for which you are either the owner or associate owner.
My Manual KPIs	KP_KPI_MANL_LIST	From the Manual KPIs search page, specify the parameters, and then click Search.	Review and enter actual values for manual KPIs for which you are either the owner or associate owner.

Related Links

My Profile Page

KPI Targets Page

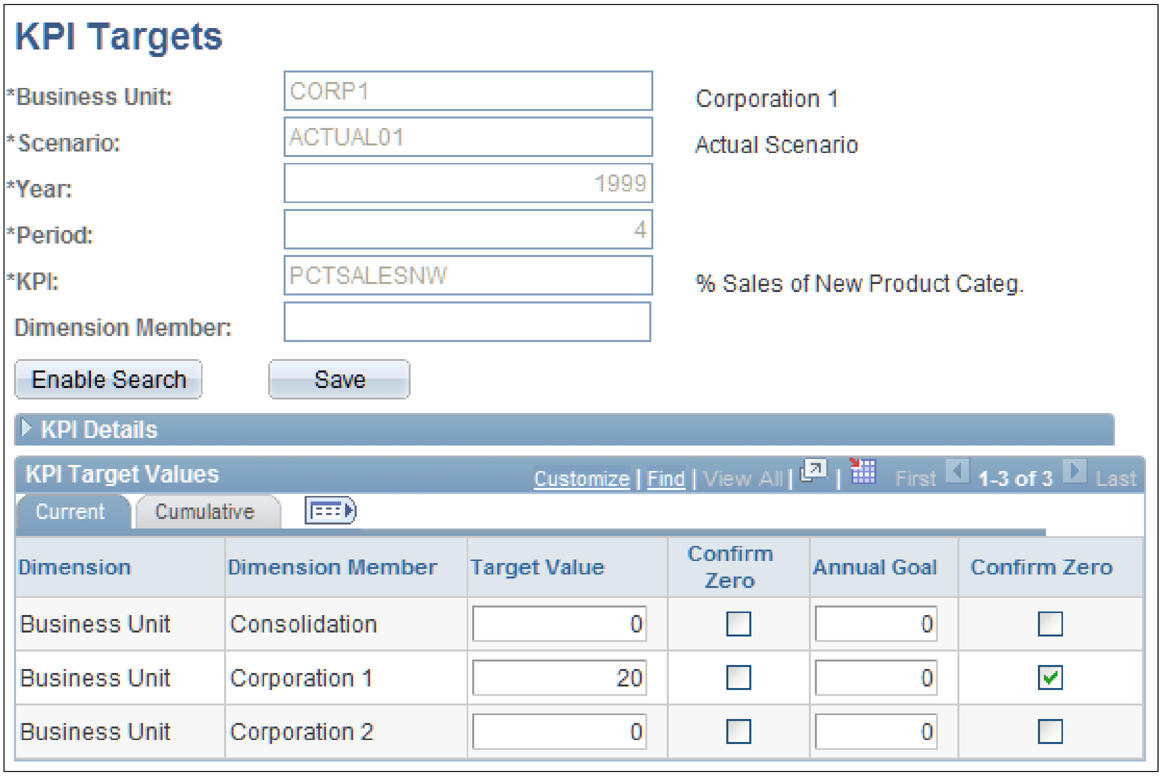
Use the KPI Targets page (KP_KPI_MANL_TBL) to enter target values for KPIs.

Navigation

Key Performance Indicators, Manual Entry, Enter KPI Targets

Image: KPI Targets page

This example illustrates the fields and controls on the KPI Targets page. You can find definitions for the fields and controls later on this page.



Business Unit, Scenario ID, Fiscal Year, Accounting Period, KPI ID, and Dimension Member	When you initially access this page, you are in search mode; specify the business unit, scenario, fiscal year, accounting period, KPI ID and dimension member for which to enter values, and then click Search. Leave the Dimension Member field blank to retrieve all the KPI dimension members that match the specified parameters that you have permission to access. The system supplies default business unit and scenario ID values based on the values specified in the My Profile page.
Search	Click to retrieve the KPI dimension members that meet the specified criteria and to enable access to the KPI value fields.
Enable Search	Click to conduct another search for manual KPIs. This enables access to the search parameter fields.
Save	Click to save the target values.

Current Tab

Enter target values for each KPI Dimension member for the current period using the fields in this grid.

Target Value Enter the target value for the period.

This is the value that is considered to be 100 percent of target.

Annual Goal Enter the target value for the annual goal for the KPI dimension member.

Confirm Zero Select to confirm that an actual value is zero. The system ignores a value of zero unless you select this option.

Cumulative Tab

If the KPI is defined with the No Aggregation check box selected, then the Cumulative tab is available; access this tab to enter quarter-to-date and year-to-date values.

QTD Target Enter the target value for the KPI dimension member's quarter-to-date results (from the beginning of the current quarter through the current period).

Confirm Zero Select to confirm that an actual value is zero. The system ignores a value of zero unless you select this option.

QTD Annual Goal Enter the target value of the annual goal for the current quarter-to-date.

YTD Target Enter the target value for the year-to-date results (from the beginning of the current fiscal year through the current period).

YTD Annual Goal Enter the target value of the annual goal for the current year-to-date.

Manual KPI Values Page

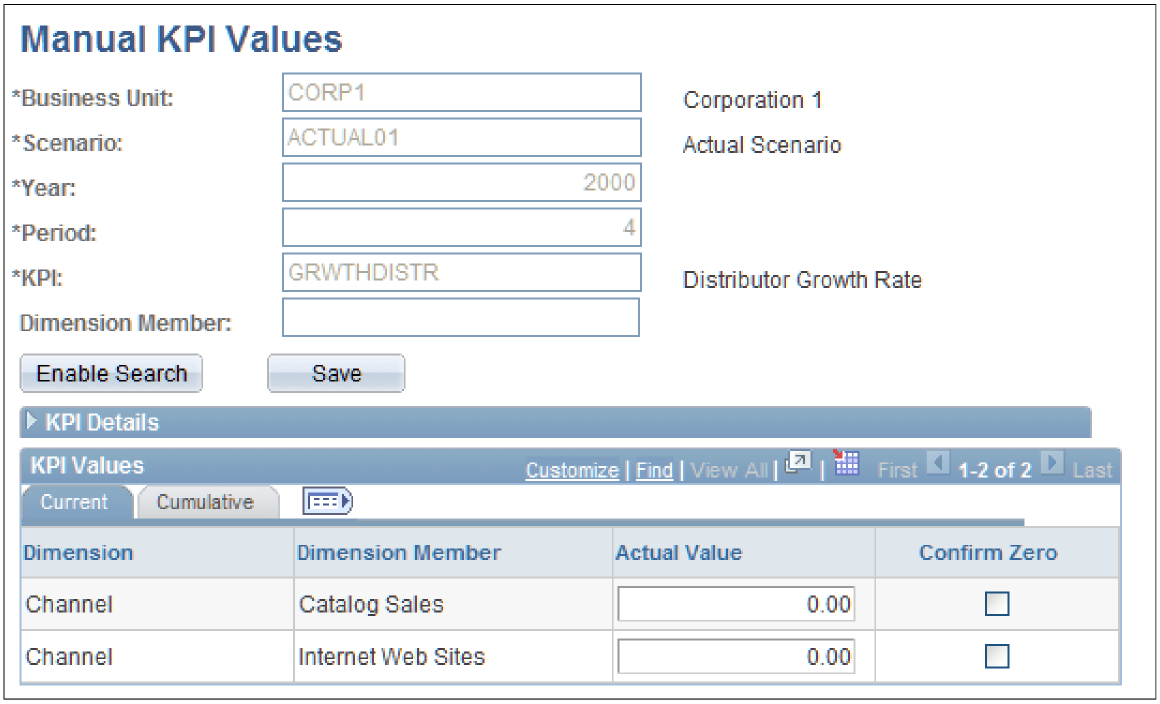
Use the Manual KPI Values page (KP_KPI_MANL_TBL) to enter actual values for manual KPIs.

Navigation

Key Performance Indicators, Manual Entry, Enter KPI Value

Image: Manual KPI Values page

This example illustrates the fields and controls on the Manual KPI Values page. You can find definitions for the fields and controls later on this page.



Business Unit, Scenario ID, Fiscal Year, Accounting Period, KPI ID, and Dimension Member

When you initially access this page, you are in search mode; specify the business unit, scenario, fiscal year, accounting period, KPI ID and dimension member for which to enter values, and then click Search. Leave the Dimension Member field blank to retrieve all of the KPI dimension members that match the specified parameters that you have permission to access. The system supplies default business unit and scenario ID values based on the values specified in the My Profile page.

Search

Click to retrieve the KPI dimension members that meet the specified criteria, and enable access to the KPI value fields.

Enable Search

Click to conduct another search for manual KPIs. This enables access to the search parameter fields.

Save

Click to save the actual values.

KPI Details

Expand this group box to view the dimension, owner, measure and aggregation setting for the KPI.

KPI Values

Complete the fields within this grid to enter values for the KPI dimension member. If the KPI is defined with the No Aggregation check box selected, then the Cumulative tab is available; access this tab to enter quarter-to-date and year-to-date values.

Actual Value	Enter the KPI dimension member's results for the current period. The default value for this field is zero.
Confirm Zero	Select to confirm that an actual value is zero. The system ignores a value of zero unless you select this option.
QTD Value	Enter the KPI dimension member's quarter-to-date results (total amounts from the beginning of the current quarter through the current period). Access this field by selecting the Cumulative tab, which is available only for KPIs that have the No Aggregation check box selected on the KPI Definition page.
YTD Value	Enter year-to-date results (total amounts from the beginning of the current fiscal year through the current period) for the KPI dimension member. Access this field by selecting the Cumulative tab, which is available only for KPIs that have the No Aggregation check box selected on the KPI Definition page.

Note: You must run the KPI Calculation Application Engine process (KP_ANALYZE) for these values to affect assessment results.

My Manual KPIs Page

Use the My Manual KPIs page (KP_KPI_MANL_LIST) to review and enter actual values for manual KPIs for which you are either the owner or associate owner.

Navigation

Key Performance Indicators, Manual Entry, My Manual KPIs.

From the Manual KPIs search page, specify the parameters, and then click Search.

Return to KPIs Search	Click to access the Search for My Manual KPIs page, where you can specify different search parameters.

KPIs - Values Tab

<KPI description>	Click to access the KPI Definition page, where you can review the details for the KPI.
Actual Value	Enter the KPI's actual value for the period. The default value for this field is zero.
Confirm Zero	Select to confirm that an actual value is zero. The system ignores a value of zero unless you select this option.

Status Displays the status of the KPI. Initially, the status is *Awaiting Input.* After you enter a value and save the page, the Status field is blank, and the Confirm Zero field is unavailable for entry.

Reset Click to eliminate an entered value. This restores the value to zero. As long as the Confirm Zero field is not selected, no value is stored for the KPI dimension member when you save the page.

KPIs - Audit Tab

Access this tab to review when and by whom the values were changed.

Using KPI Maintenance Utilities

This topic discusses how to:

- Review KPI metadata
- Audit KPIs
- Recompile KPI-related SQL

Pages Used to Maintain KPIs

Page Name	***Definition Name***	***Navigation***	***Usage***
Expression	PF_EXPR_DEFN	Key Performance Indicators, Administration, Debugging, Expressions	Review KPI expressions.
KPI Operands Datamap	PF_DATAMAP_DEFN	Key Performance Indicators, Administration, Debugging, Operands Datamap	Review KPI data maps.
Audit EPM Objects	RUN_PF_AUDIT	EPM Foundation, Foundation Metadata, Other Metadata Operations, Audit EPM Objects	Validate KPI data.
Compile Metadata Changes	RUN_PF_COMPILE	EPM Foundation, Foundation Metadata, Other Metadata Operations, Compile Metadata Changes	Recompile KPI data.

Related Links

"Running Mass Compile *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*"
"Understanding Metadata *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*"

Expression Page

Use the Expression page (PF_EXPR_DEFN) to review the underlying PeopleSoft EPM information for KPIs. These pages should be accessible only to information technology professionals, and you should define security for them accordingly. Do not change any of the data that you see on these pages—this data is generated and maintained by the system.

Navigation

Key Performance Indicators, Administration, Debugging, Expressions

To access KPI information, use the appropriate codes in the search dialog:

- KPI expression codes begin with KP$.
- The datamap code used by KPIs or KPI expressions is KPOPERANDS.

Audit EPM Objects Page

Use the Audit EPM Objects page (RUN_PF_AUDIT) to validate KPI data. This utility checks for potential problems within the data elements, calculation rules, constraints, filters, and other KPI-related metadata, and it ensures that certain conditions are met. Use this utility periodically to review KPIs, or any time that changes have been made to PeopleSoft EPM data or KPI metadata.

Navigation

EPM Foundation, Foundation Metadata, Other Metadata Operations, Audit EPM Objects

To run an audit:

1. Access the Audit EPM Objects page
2. Select the KPI Manager check box, then run the process.
3. To review the results of the KPI audit, access the Inquire - Messages page.

   Use the Message Header and Message Detail pages to review any problems detected with your KPIs, and correct them accordingly.

Related Links

"Auditing PeopleSoft EPM Objects *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*"

Compile Metadata Changes Page

Use the Compile Metadata Changes page (RUN_PF_COMPILE) to recompile KPI data.

Navigation

EPM Foundation, Foundation Metadata, Other Metadata Operations, Compile Metadata Changes

PeopleSoft EPM has a utility that recompiles KPI-related SQL. Use this utility when changes have been made to PeopleSoft EPM data or KPI metadata.

To recompile KPI SQL:

1. Access the Compile Metadata Changes page
2. Select one or more of the check boxes within the Scorecard section, and then run the process.

Migrating KPIs to a Different Database

To migrate KPIs, use the KPI Migration Utility (KP_DATA_UTIL) component.

This topic provides an overview of the KPI migration utility and discusses how to:

- Define a KPI package.
- Review the KPIs in a KPI package.

Pages Used to Migrate KPIs

Page Name	***Definition Name***	***Navigation***	***Usage***
KPI Package	BC_KPIPACK_DFN	Key Performance Indicators, Administration, KPI Package, KPI Package	Define a KPI package, and review the naming conventions for delivered scorecard application KPIs.
KPI Package KPIs	BC_KPIPACK_KPIS	Key Performance Indicators, Administration, KPI Package, KPI Package KPIs	Review the KPIs that make up a KPI package.
KPI Migration Utility	KP_DATA_UTIL	Key Performance Indicators, Administration, KPI Migration Utility	Create the .DAT file that contains the KPI data to export.

Understanding the KPI Migration Utility

The KPI migration utility enables you to move delivered KPIs from the DEMO database to your production database. Use this utility to move delivered KPIs for specific PeopleSoft Scorecard applications, such as Healthcare Scorecard, from a demo database to a production (SYS) database. The migration utility works by creating a .DAT file of the data to move, in conjunction with the following data mover scripts:

- KP890EXP.DMS

  This script exports the data from the DEMO database.

- KP890IMP.DMS

  This script imports the exported data into the target production database.

The migration utility uses a KPI package definition to determine which data to include in the .DAT file. A KPI package identifies a collection of KPI data based on a naming convention that uses a unique prefix for the KPI IDs for each of the various scorecard applications. You can also define KPI packages to meet your requirements; however, this means that you must devise a prefix schema for naming KPIs.

The utility moves the KPIs, as well as the related data elements, and all other required KPI metadata, such as table maps, data maps, filters, constraints, and KPI-related tree data.

To use the migration utility to move KPI data, complete the following steps:

1. Load delivered KPIs for the scorecard application into the demo environment by running the appropriate dms script.

   Note: This step is typically done during installation.

   ---

2. Using the KPI Migration Utility page, specify the SetID and business unit in the production environment that will receive the KPI data, and click the Update button.
3. Modify the delivered KPI data, if needed, to suit your implementation requirements.

   For example, you might decide to modify the calculation rules for some of the delivered KPIs.

   You can also add new KPIs in the DEMO database; as long as you follow the naming convention for that scorecard application, the system will also migrate those KPIs. You can review the naming convention for each scorecard by using the KPI Package page.
4. After all modifications are complete, and you are ready to export the KPI data, access the KPI Migration Utility page and click the Export button.

   This creates the DAT file that you will export.
5. Using Data Mover, while logged on to the demo database, run the KP890EXP.DMS script to export the .DAT file from the DEMO database.
6. Log on to the target production database, and, using DataMover, run the KP890IMP.DMS script to import the file into the target database.
7. Run the Mass Compile utility in PeopleSoft EPM to generate the new SQL objects for the imported data.
8. In the Scorecard application, run the KPI Calculation Application Engine process to calculate and assess the KPIs.

The following sections provide detailed instructions for using the KPI Migration Utility pages.

See also the EPM Installation Guide and "Using PeopleSoft Data Mover" in the *PeopleTools: Data Management* product documentation.

Related Links

"Running Mass Compile *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*"

Understanding KPI and Scorecard Processing

KPI Package Page

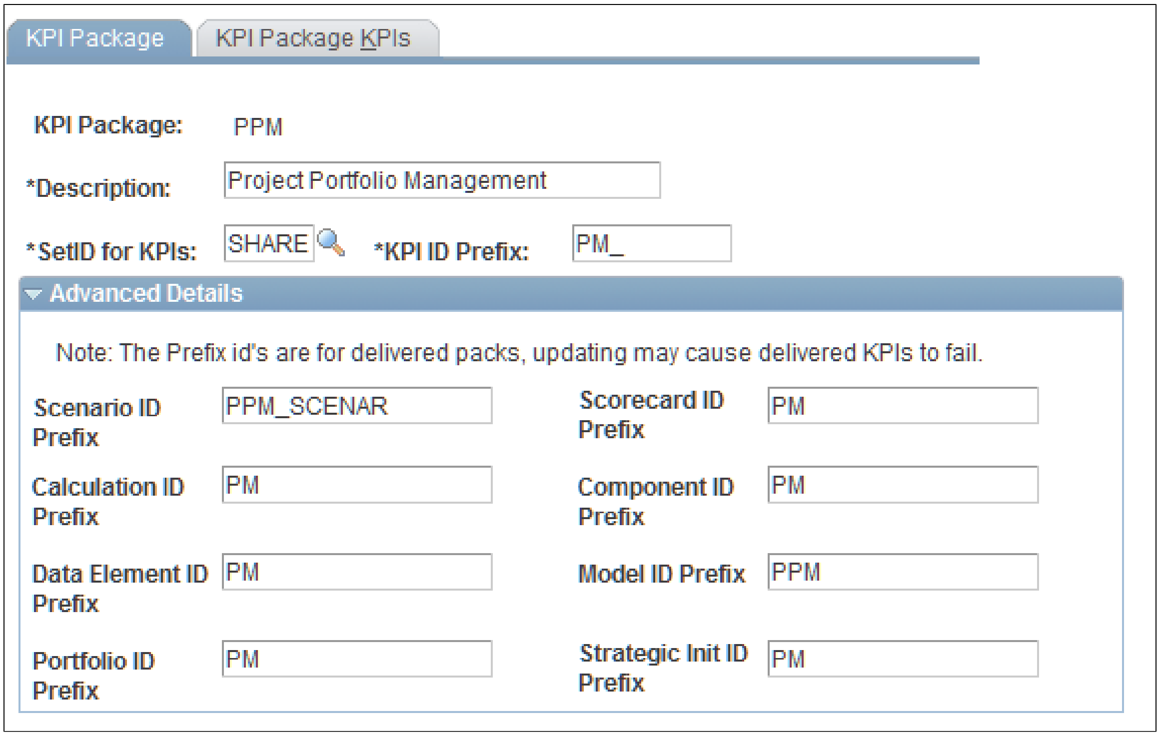
Use the KPI Package page (BC_KPIPACK_DFN) to define a KPI package, and review the naming conventions for delivered scorecard application KPIs.

Navigation

Key Performance Indicators, Administration, KPI Package, KPI Package

Image: KPI Package page

This example illustrates the fields and controls on the KPI Package page. You can find definitions for the fields and controls later on this page.



Package Details

KPI Package

Specify the ID for the KPI package. Delivered package IDs are:

CFO Portal: Select for CFO Portal KPIs.

CUSTOMER: Select for Customer Scorecard.

HEALTHCARE: Select for Healthcare Scorecard.

INVESTORPORTAL: Select for Investor Portal.

MANUFACTURING: Select for Manufacturing Scorecard.

PPM: Select for Project Portfolio Management KPIs.

SUPPLIERRATINGSYSTEM: Select for Supplier Rating System.

WORKFORCE: Select for Workforce Scorecard.

Description	The description for the KPI package. This description appears in the list of values for the Scorecard Type field on the KPI Migration Utility page.
KPI ID Prefix	Enter the prefix of the KPIs to include in the KPI package. The system uses this to build the query that retrieves the KPIs for the package. This field is automatically populated for the delivered KPI packages, and should not be modified.

Advanced Details

Expand this group box to view the naming conventions for the prefixes used by the delivered KPIs for the following KPI data. Do not modify these values if you are exporting delivered KPIs. These values are used to further define the data that the system retrieves for the .DAT file.

Scenario ID Prefix	The prefix of the scenario with which the KPIs are associated.
Calculation ID Prefix	The prefix of the calculation IDs that are used by the KPIs.
Data Element ID Prefix	The prefix of the data elements used by the KPIs.
Portfolio ID Prefix	The prefix of the portfolios used by the KPIs.
Scorecard ID Prefix	The prefix of the scorecards with which the delivered KPIs are associated.
Component ID Prefix	The prefix of the strategy components with which the delivered KPIs are associated.
Component ID Prefix	The prefix of the model with which the delivered KPIs are associated.
Strategic Init ID Prefix (strategic initiative ID prefix)	The prefix of the strategic initiatives with which the delivered KPIs are associated.

KPI Package KPIs Page

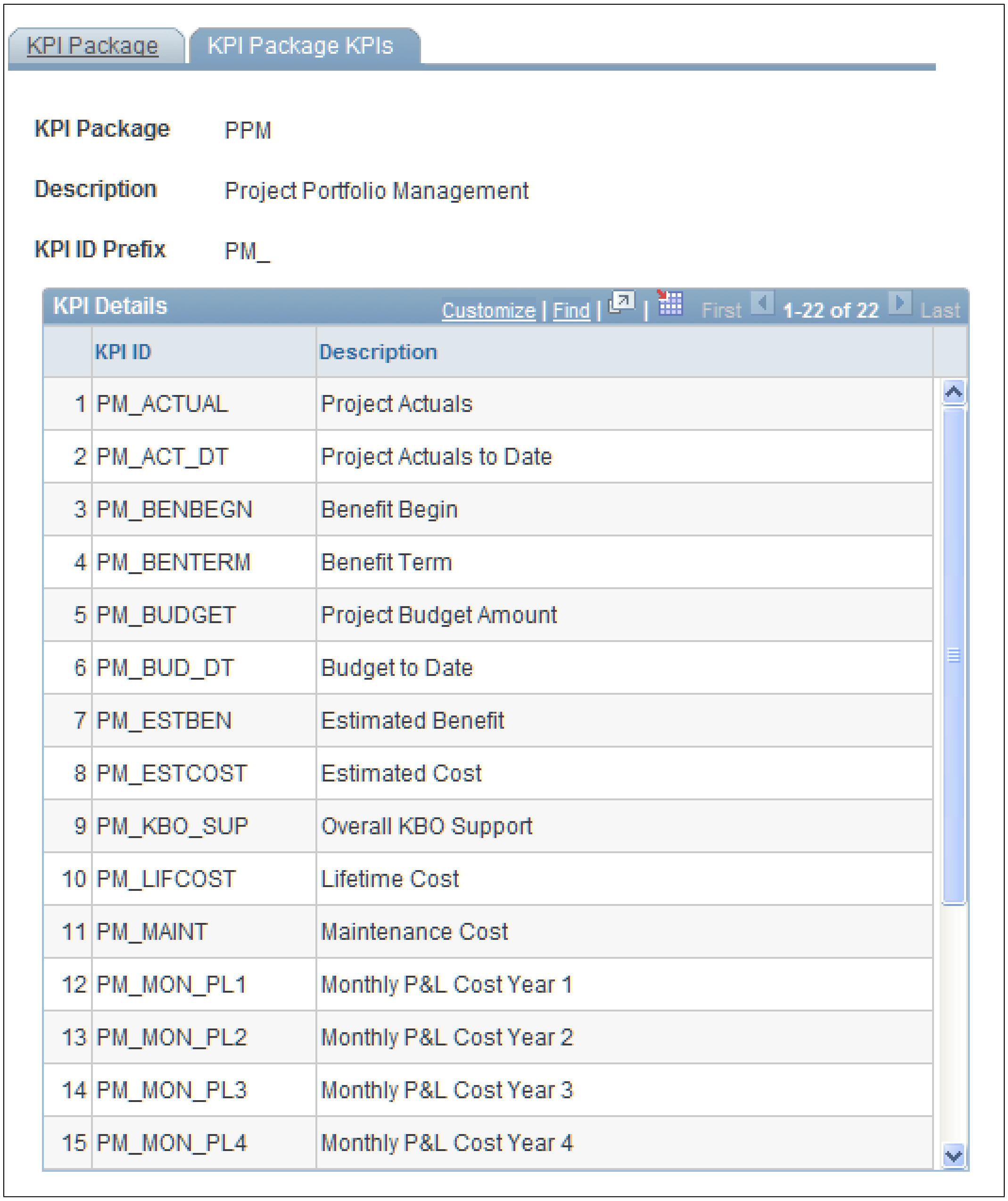
Use the KPI Package KPIs page (BC_KPIPACK_KPIS) to review the KPIs that make up a KPI package.

Navigation

Key Performance Indicators, Administration, KPI Package, KPI Package KPIs

Image: KPI Package KPIs page

This example illustrates the fields and controls on the KPI Package KPIs page. You can find definitions for the fields and controls later on this page.


KPI Package | KPI Package KPIs

KPI Package PPM

Description Project Portfolio Management

KPI ID Prefix PM_

KPI Details Customize | Find | | First 1-22 of 22 Last

	KPI ID	Description
1	PM_ACTUAL	Project Actuals
2	PM_ACT_DT	Project Actuals to Date
3	PM_BENBEGN	Benefit Begin
4	PM_BENTERM	Benefit Term
5	PM_BUDGET	Project Budget Amount
6	PM_BUD_DT	Budget to Date
7	PM_ESTBEN	Estimated Benefit
8	PM_ESTCOST	Estimated Cost
9	PM_KBO_SUP	Overall KBO Support
10	PM_LIFCOST	Lifetime Cost
11	PM_MAINT	Maintenance Cost
12	PM_MON_PL1	Monthly P&L Cost Year 1
13	PM_MON_PL2	Monthly P&L Cost Year 2
14	PM_MON_PL3	Monthly P&L Cost Year 3
15	PM_MON_PL4	Monthly P&L Cost Year 4

This page lists all of the KPIs that are included in the KPI package. Use it to determine the KPIs that the system will export.

KPI Migration Utility Page

Use the KPI Migration Utility page (KP_DATA_UTIL) to create the .

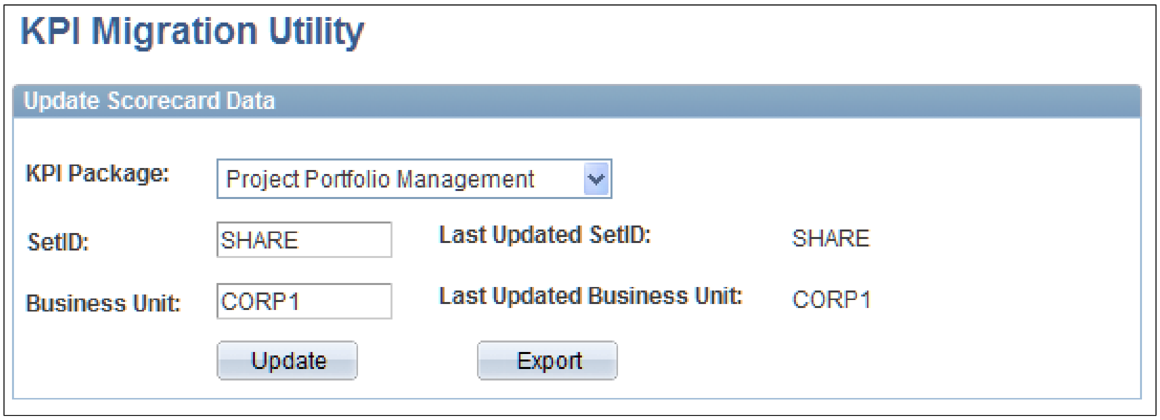
DAT file that contains the KPI data to export.

Navigation

Key Performance Indicators, Administration, KPI Migration Utility

Image: KPI Migration Utility page

This example illustrates the fields and controls on the KPI Migration Utility page. You can find definitions for the fields and controls later on this page.



KPI Package	Specify the data to export by selecting a KPI package description from the list of values.
SetID	Specify the target SetID (the SetID in the production database) for the KPI data. If you do not complete this field, the system uses the SHARE SetID.
Last Updated SetID	Displays the SetID that was updated the previous time that this utility was used.
Business Unit	Specify the target business unit (the business unit in the production database) for the KPI data. If you do not complete this field, the system uses the CORP1 business unit.
Last Updated Business Unit	Displays the business unit that was updated the previous time that this utility was used.
Update	Click to populate the migration utility tables with the target SetID and business unit values.
Export	Click to create the DAT file with the KPI data.

Note: To move the data, you will need to use DataMover to export the file from the demo database, and then import it into the production database.

See Understanding the KPI Migration Utility.

Chapter 4

Defining Your Strategy and Establishing Scorecards

Understanding Scorecards

This topic discusses:

- Scorecard elements.
- Scorecard IDs and descriptions for generated scorecards.
- Strategy trees.
- Assessment methods.

Scorecard Elements

A scorecard is a hierarchically related set of objectives that must be met to achieve an overall goal. These objectives are compared to established targets to monitor progress and identify potential obstacles. Scorecards are based on a strategy tree, which depicts the hierarchical structure of your objectives (the strategy components of the scorecard) from vision to strategic thrusts (STs) to critical success factors (CSFs). The rule for how each component is scored is defined by its assigned assessment method. Key performance indicators (KPIs) are associated with scorecard components. The KPI results are evaluated to determine assessments, but KPIs are not part of the strategy tree. KPIs are associated with strategy components on the Strategy KPIs page.

When defining a scorecard, you specify the users or roles that will use the scorecard by completing a distribution list. When you run the Scorecard Assessment process, the system automatically generates the scorecards for every user that is included on the distribution list. This enables you to generate multiple scorecards by defining a single base scorecard.

Establishing a scorecard involves several steps:

- Create a strategy tree and define its strategy components.

  You use PeopleSoft Tree Manager to define the tree, and the Strategy Component page to define each strategy component.

- Associate KPIs with strategy components.
- Define cause-and-effect relationships among strategy components.

  This is an optional step.

- Define the base scorecard.

When you define the base, or template, scorecard, you associate the strategy tree with the scorecard, define the KPIs and dimension members to include, specify which assessments are treated as exceptions, specify the user IDs or roles for which to generate scorecards, and optionally identify any related KPIs.

- Generate the individual scorecards by running the Scorecard Assessment Application Engine process (BSC_ASSESS).

  The engine must be run to create each scorecard. The key fields for a scorecard include the Scorecard ID and the User ID. Each scorecard is personalized for the user for which it is generated. For each user, only the KPIs and dimension members that the user has permission to access appear in his or her personal scorecard, and assessments are determined by considering only the user's personal set of KPIs and dimension members.

Note: To enable other users to view a personal scorecard, you must establish the appropriate security for that scorecard by defining the security in PeopleSoft EPM.

These tasks are described in detail in this topic.

Workflow

During scorecard processing, the system sends email notifications to scorecard users the *first* time that a scorecard is generated and assessed for them. The system tracks whether a notification email has already been sent to a particular user. You can also notify all scorecard users when the scorecards are reprocessed by selecting an option on the Scorecard - Personalize For page.

Scorecard IDs and Descriptions for Generated Scorecards

Using the following logic, the system automatically generates the scorecard IDs and descriptions when it runs the Scorecard Assessment process:

- To generate the scorecard IDs, the system combines the base scorecard ID with the sequence number from the distribution list.
- To generate the scorecard descriptions, the system combines the base scorecard description with either the user ID description, or for roles, the user ID description of each user who is assigned to the role ID.
- For roles, the system generates as many personal scorecards as correspond to the number of users who are assigned to the role.

  For example, if four product managers are assigned to the role Product Manager, the system generates four personal scorecards. Individuals who are granted access to the scorecard ID for the role have access to all the personal scorecards that are generated from the role.

For example, assume that a base scorecard is defined with the following users entered in the distribution list:

Base Scorecard ID	***Description***	***Distribution List***	***Type***
CORPORATE	Corporate Scorecard		

Base Scorecard ID	***Description***	***Distribution List***	***Type***
		JSmith	User
		MSmith	User
		JDoe	User
		Product Managers	Role (Assume that four userIDs are associated with this role)

The system-generated scorecards will have the following IDs and descriptions:

Generated Scorecard ID	***Generated Description***
CORPORATE1	Corporate Scorecard - John Smith
CORPORATE2	Corporate Scorecard - Mary Smith
CORPORATE3	Corporate Scorecard - John Doe
CORPORATE4	Corporate Scorecard - ESC Product Mgr
CORPORATE4	Corporate Scorecard - ABM Product Mgr
CORPORATE4	Corporate Scorecard - FSI Product Mgr
CORPORATE4	Corporate Scorecard - GC Product Mgr

The list of dimension members that are defined on the base scorecard is the complete list of KPIs and dimension members to be considered for assessments; however, when determining assessments for the generated scorecards, the system considers only the KPIs and dimension members to which an individual user has been granted access.

Note: If you modify the distribution list or other aspects of the base scorecard after the system generates the personal scorecards, the changes are not considered until the next time you run the Scorecard Assessment process.

Strategy Trees

The strategy tree defines the hierarchical structure of the components of the scorecard. When defining a scorecard, you specify the strategy tree with which it is associated. When you use the various scorecard monitoring pages to review the progress of your strategy, you navigate through the strategy tree to view the results for each component. During the planning phases of Scorecard implementation, the appropriate members of an organization should meet to define the strategic goals and to sketch the scorecards that they plan to implement. These diagrams serve as the templates for the strategy trees that you create.

Note: This product documentation assumes that you are familiar with tree manager. If you are not, refer to your PeopleSoft Tree Manager documentation.

See *PeopleTools: PeopleSoft Tree Manager*

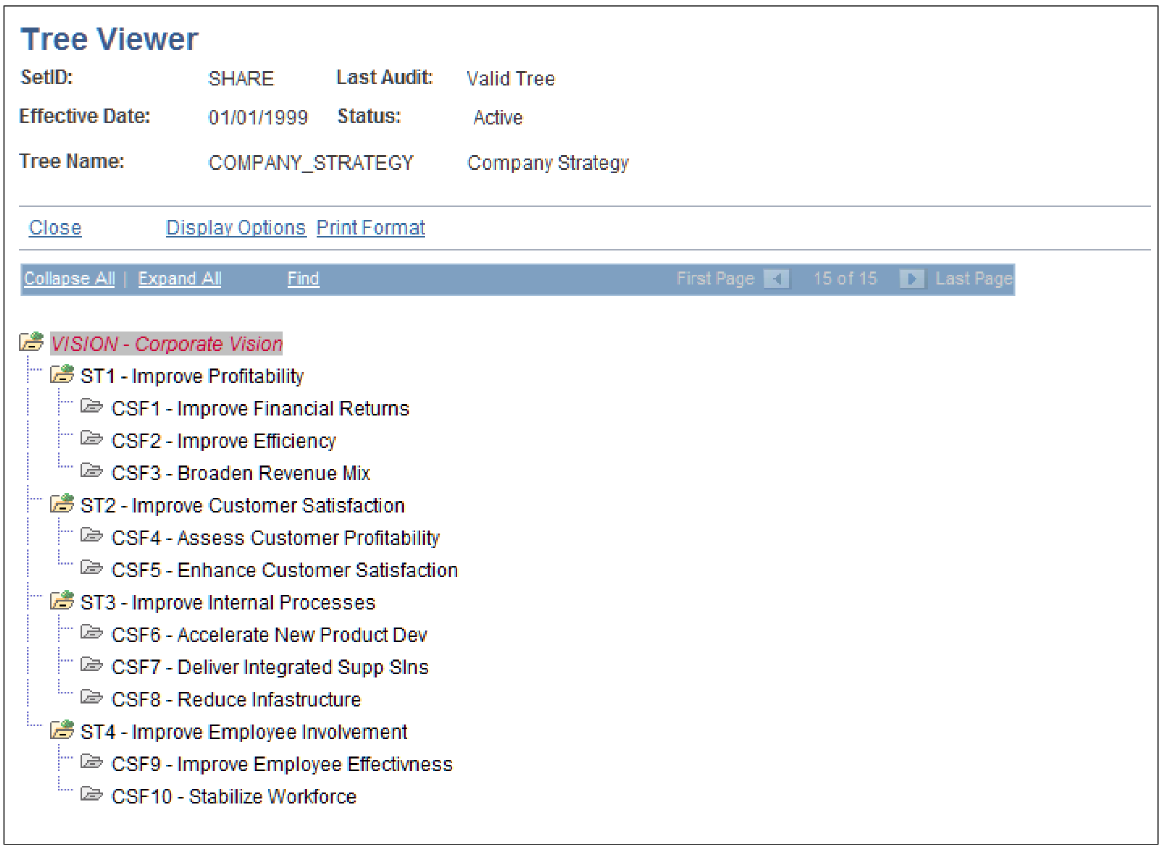
Three delivered sample trees exist in the SHARE SetID that you can review as examples. They are:

- COMPANY_STRATEGY
- DEPT_STRATEGY
- GLOBAL_BUS_INTL

Here is the COMPANY_STRATEGY tree with all of its nodes expanded:

Image: COMPANY_STRATEGY tree

COMPANY_STRATEGY tree



When planning your scorecard, if you intend to strictly follow balanced scorecard theory standards, your strategy should be balanced across at least these four perspectives (you can also add other perspectives, if needed):

- Financial
- Customer
- Internal
- Learning

When you create your strategy tree, these perspectives typically correspond to the strategic thrust nodes that you create. CSFs are the child nodes beneath strategic thrusts. So the levels on the tree correspond to vision, strategic thrust, and CSF.

KPIs are *not* attached as nodes to the tree. You associate KPIs with their components using the Strategy KPIs page. As you add each node, the system displays the Strategy Component page, on which you enter details for that component.

Strategy Tree Structure Requirements

When you create strategy trees, you should use the BALANCED_SCARD structure that is provided within the SHARE SetID. If you choose to establish your own tree structure to use with strategy trees, use the values that are listed in the following table for the tree structure fields. Any fields that are not listed in this table can be populated with values that are appropriate for your organization, or you can use the default values for those fields. The Nodes tab is particularly important. Its fields control which page appears when you create a new node or edit data for an existing node, as well as the database records that are associated with the tree nodes.

Tab	***Field***	***Value***
Structure	Type	*Detail*
	Additional Key Field	*SetID Indirection*
Levels	Record Name	*TREE_LEVEL_TBL*
	Page Name	*TREE_LEVEL*
Nodes	Record Name	*BC_COMPONENT*
	Field Name	*COMPONENT_ID*
	Page Name	*BC_COMPONENT_DFN*
	Component Name	*BC_COMPONENT_DFN*
	Menu Name	*DEFINE_SCORECARDS*
	Menu Bar Name	*SETUP*
	Menu Item Name	*BC_COMPONENT_DFN*
Details	All Fields	Not applicable, leave blank.

Strategy Tree Guidelines

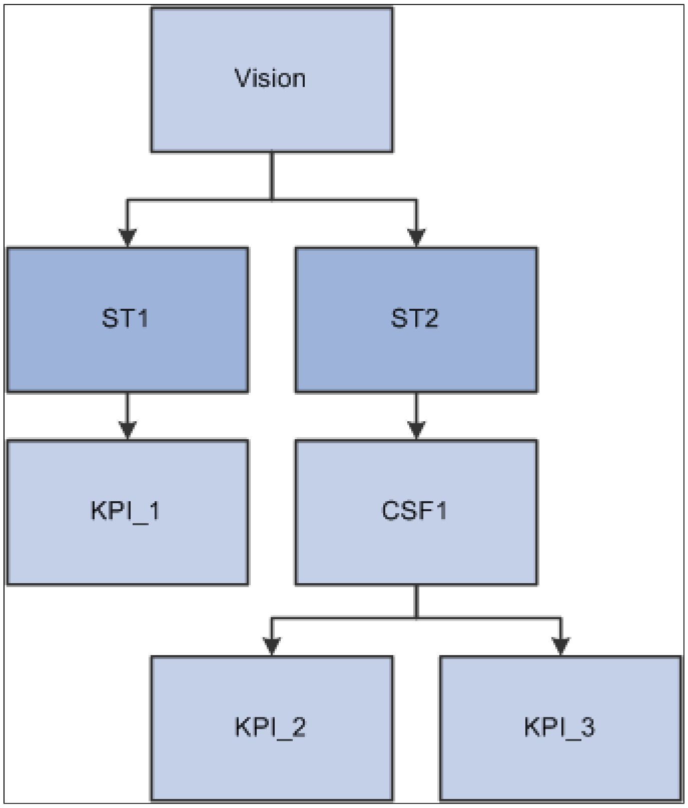
You must follow these rules that are specific to strategy trees:

- A specific KPI can be used only once on a scorecard.
- The component with which a KPI is associated must be at the lowest level node on the strategy tree.

Whether that node is a critical success factor or strategic thrust doesn't matter, but it must be the lowest level node on that particular branch of the tree. For example, in the following diagram KPI_1, KPI_2, and KPI_3 are valid. If you associate a KPI with ST2, it would be ignored during assessment because the component it is attached to (ST2) has a component that is subordinate to it (CSF1):

Image: KPI association requirements

KPI association requirements



The system provides a query that audits this situation, the Strategy Trees with Non-Terminal KPIs query.

See Viewing Predefined Queries for Scorecards and KPIs.

Assessment Methods

The assessment method controls how the system determines the score of a component. When you define a strategy component, you assign it an assessment method. Four assessment methods are available:

- Best case
- Worst case
- Most frequent
- Weighting

During scorecard assessment processing, assessment takes place starting at the lowest level of the strategy tree, then moves up the tree to score the components at each level. The system considers only the directly subordinate level when it determines the score for a given strategy component. Critical success factors are assessed first, then strategic thrusts, and finally, vision.

This table describes each assessment method and explains how it determines the resulting score for a component:

Assessment Method	***Resulting Score***
Best Case	The single best assessment achieved by its subordinates is used.
Worst Case	The single worst assessment achieved by its subordinates is used.
Most Frequent	The most common score of its subordinates is used. In the case of a tie, the assessment method in the Tie Breaker field determines the result.
Weighting	The weighted average score of the subordinate KPIs is computed, and the corresponding assessment for that value, as defined in the weight scale, is used. (Use only for components that have KPIs as their only subordinates).

For example, consider the CSF Broaden Sales Opportunities, for which subordinate KPI dimension members have received the assessments listed in this table:

KPI	***Dimension Member***	***Assessment***	***Numeric Equivalent***
Distributor Growth Rate	Catalog Sales	Yellow	20
Distributor Growth Rate	Internet Websites	Green	30
Total Sales by Product	Office Furniture	Red	10
Total Sales by Product	Home Outdoors	Green	30
Total Sales by Product	Home Interior	Yellow	20

The assessment results for Broaden Sales Opportunities, depending on the assessment method that is used, are listed here. For this example, assume that the Tie Breaker field is set to *Worst Case.*

Best Case Green

Worst Case Red

Most Frequent Yellow

Weighting

When a strategy component uses weighting as its assessment method, the system computes a resolved weight for all the KPIs that are associated with that strategy component, and compares that number to an associated weight scale to determine the assessment results. The KPI dimension members are still compared with their defined targets during KPI processing, but the resulting numeric equivalent of the assessment is used in the weighting calculations.

The weight factors for each of the KPIs that are associated with a strategy component are entered on the Strategy KPIs page, enabling you to specify the relative importance of each KPI. You also use the Strategy KPIs page to assign the weight scale. You define weight scales on the KPI Weight Scale page. KPIs that have a weight factor of zero indicate that the KPI does not influence the overall score and are not considered.

Because each KPI might include several dimension members, the Weight Factor Allocation field on the Dimension Members page defines how the weight factor is distributed among the individual KPI dimension members. This enables you to indicate which dimension members within a given KPI should have a greater effect in determining the assessment. You can't use weight factors for business-unit based KPIs, because processing is carried out per business unit.

To compute the KPI weights, the Scorecard Assessment process first allocates the weight factor of the KPI to its members using the weight factor allocation that is defined for each member. If the KPI dimension members are defined by a rule, then all dimension members are assumed to have the same weight factor. Each KPI dimension member is then assigned an individual weight factor, which is stored in the database and appears on the appropriate scorecard pages.

The formula for determining the weight factor of each dimension member is:

(KPI Weight Factor) × *(Weight Factor Allocation)* ÷ 100

To determine the assessment of the strategy component, the system computes the overall weighted average by summing *(KPIs Assessment Numeric Equivalent)* × *(KPI Dimension Member Weight Factor)* for all KPIs and dividing the result by the sum of all the KPI weight factors. This amount is compared to the KPI weight scale to determine the final assessment.

This example shows how the weighting assessment is resolved. The Enhance Customer Satisfaction CSF has three KPIs associated with it: Customer Satisfaction Rating, On Time Delivery, and Number of Returned Shipments. Customer Satisfaction Rating is considered more important than the other two KPIs. These KPI weight factors are assigned on the Strategy KPIs page.

Strategy KPIs	***KPI Weight Factor***
Customer Satisfaction Rating	60
On Time Delivery	20
Returned Shipments	20

Customer Satisfaction has a dimension of channel. On the Dimension Members page, two channels are specified: catalog sales and internet sales. Internet sales are considered more important than catalog sales, so these weight factor allocations are assigned on the Dimension Members page:

KPI Dimension Member	***Weight Factor Allocation***
Catalog Sales	40
Internet Sales	60

The Enhance Customer Satisfaction CSF uses this weight scale, which assigns the lower weighted average a lower assessment:

Lowest Value	***Highest Value***	***Assessment***
0	17	Red
18	27	Yellow
28	999	Green

The weight factors for the KPI dimension members for Enhance Customer Satisfaction are:

Strategy KPIs	***KPI Weight Factor***	***KPI Dimension Members***	***Weight Factor Allocation***	***Calculation***	***KPI Dimension Member Weight Factor***
Customer Satisfaction Rating	60%	Catalog Sales	40%	(60.00 × 40.00) ÷ 100	24.00
		Internet Sales	60%	(60.00 × 60.00) ÷ 100	36.00
On-time Delivery	20%	Catalog Sales	40%	(20.00 × 40.00) ÷ 100	8.00
		Internet Sales	60%	20.00 × 60.00 ÷ 100	12.00
Returns	20%	Catalog Sales	40%	20.00 × 40.00 ÷ 100	8.00
		Internet Sales	60%	20.00 × 60.00 ÷ 100	12.00

KPI assessments are determined by their target rule; weight factors apply only to strategy components, and are not considered when the system assesses KPIs. The KPI assessment results are shown in this table:

Strategy KPIs	***KPI Dimension Members***	***KPI Assessment***
Customer Satisfaction	Catalog Sales	Green
	Internet Sales	Yellow
On-time Delivery	Catalog Sales	Green
	Internet Sales	Red
Returns	Catalog Sales	Green
	Internet Sales	Red

The assessment numeric equivalent for red is 10, yellow is 20, and green is 30.

The formula for computing the weighted average is:

The sum of *((KPIs Numeric Equivalent for the Assessment Value) × (KPI Dimension Member Weight Factor))* for all KPIs divided by the sum of all the weight factors.

This table shows the results:

KPI	***Dimension Member***	***Assessment Numeric Equivalent***	***Dimension Member Weight Factor***	***Calculation***	***Result***
Customer Satisfaction Rating	Catalog Sales	Green 30	24.00	30 × 24.00	720
	Internet Sales	Yellow 20	36.00	20 × 36.00	720
On-time Delivery	Catalog Sales	Green 30	8.00	30 × 8.00	240
	Internet Sales	Red 10	12.00	10 × 12.00	120
Returns	Catalog Sales	Green 30	8.00	30 × 8.00	240
	Internet Sales	Red 10	12.00	10 × 12.00	120
Total			100		2160
Calculation	2160 ÷ 100				
Weighted Average for Enhance Customer Satisfaction	21.60				

The system determines the overall assessment for customer satisfaction based on where the weighted average occurs within the weight scale value ranges. The weighted average must be equal to or greater than the lowest value and equal to or less than the highest value.

Using the defined weight scale, the weighted average of 21.60 is equal to or greater than 18 and equal to or less than 27, so the Customer Satisfaction CSF receives a yellow assessment.

Related Links

Key Terms

Understanding Strategic Initiatives

To monitor a special initiative or project, you can define strategic initiatives. These use scorecard components and KPIs, but do not require a strategy tree. The system provides pages that enable you to view strategic initiatives and monitor their progress.

Related Links

Initiative Page

Defining Your Strategy

To define your strategy, use the Strategy Component (BC_COMPONENT_DFN), Strategy KPIs (BC_COMPNT_KPI), and Strategy Cause and Effect (BC_CAUSE_EFFECT1) components.

This topic discusses how to:

- (Optional) Establish additional perspectives.
- Create a strategy tree.
- Define strategy components.
- Associate KPIs with components.
- (Optional) Define component cause and effect relationships.

Pages Used to Define Your Strategy

Page Name	***Definition Name***	***Navigation***	***Usage***
Tree Manager	PSTREEDEFN	• Tree Manager, Tree Manager • Scorecards, Define Strategic Goals, Strategy Tree	Create a strategy tree.
Strategy Component	BC_COMPONENT_DFN	• Scorecards, Define Strategic Goals, Strategic Components, Strategy Component • Appears automatically when you add or edit strategy tree nodes.	Define a strategy component and specify its assessment method.

Page Name	***Definition Name***	***Navigation***	***Usage***
Strategy Component - Attachments	BC_COMPONENT_DFN2	Scorecards, Define Strategic Goals, Strategic Components, Attachments	Associate attachments (any file type that is accessible through a URL) with a strategy component. You can view the file when you monitor the scorecard.
Strategy KPIs	BC_COMPNT_KPI	Scorecards, Define Strategic Goals, Strategic Comp's KPI Set	Specify the KPIs that belong to a strategy component.
Strategy Cause and Effect	BC_CAUSE_EFF	Scorecards, Define Strategic Goals, Cause and Effect Set	Indicate how a component influences other components.

Related Links

System Options Page
KPI Weight Scale Page
Assessment Methods

(Optional) Establishing Additional Perspectives

In addition to perspectives that are delivered, you can define additional perspectives by adding translate values to the PERSPECTIVE_TYPE field. To define a new perspective:

1. Open the PERSPECTIVE_TYPE field definition in PeopleSoft Application Designer.
2. Open the field properties for PERSPECTIVE_TYPE.

   You can also right-click and select Field Properties, or press Alt+Enter.
3. From a record field definition window, right-click the field, and select View Translates from the shortcut menu.
4. Select the Translate Values tab.

   The Translate Values dialog box shows existing values for the field and enables you to add, change, or delete values. In the Last Updated section, the system displays information such as date, time, and user ID about the last update for the selected translate value.
5. Click Add to define a new value.
6. Enter the field value, effective date, long name, and short name for the new perspective.
7. Click OK to save your new perspective value.

Tree Manager Page

Use the Tree Manager page (PSTREEDEFN) to create a strategy tree.

Navigation

- Tree Manager, Tree Manager
- Scorecards, Define Strategic Goals, Strategy Tree

To create a strategy tree:

1. Create a new tree.

   Use the BALANCED_SCARD structure, or make sure that the structure that you use meets the requirements for a strategy tree. Set the Use of Levels field to *Strictly Enforced.*

2. Define the tree levels.

   You should consider using three: vision, strategic thrusts, and CSFs. The levels VISION, STRATEGY, and CSF are provided with the sample data.

3. Insert the tree nodes, starting with the root node.

   Remember that the root node represents your organization's vision.

4. Complete the Strategy Component page for each node.

Strategy Component Page

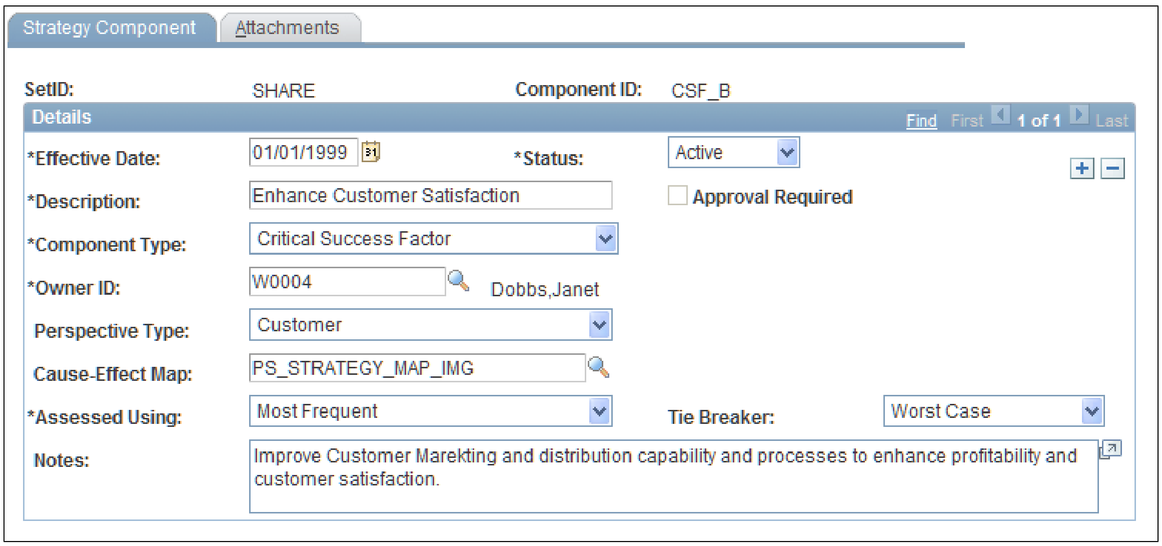
Use the Strategy Component page (BC_COMPONENT_DFN) to define a strategy component and specify its assessment method.

Navigation

- Scorecards, Define Strategic Goals, Strategic Components, Strategy Component
- Appears automatically when you add or edit strategy tree nodes.

Image: Strategy Component page

This example illustrates the fields and controls on the Strategy Component page. You can find definitions for the fields and controls later on this page.



Component Type

Select the type of strategy component to define. The type should correspond to the level of the strategy tree that it is on. Options are *Critical Success Factor, Strategic Thrust,* and *Vision.*

Approval Required

Select to require that the owner approve any manual changes to the assessment results for this strategy component.

This field is available for entry only if the Approval Required check box is selected on the Options page.

Owner ID

Select the individual who is primarily responsible for this component.

Perspective Type

Select the perspective within which to categorize this component.

The system uses this information to display component assessments grouped by perspective type.

Cause-Effect Map

Select the image that represents the cause-and-effect relationship for this component. This appears on the Strategy Detail - Strategy Map page when you view this component.

You must create the image in another application and add it to the image repository using PeopleSoft Application Designer.

Assessed Using

Select the assessment method for this component. Options are:

Best Case: Uses the best score that is attained by any strategy component in the level directly beneath.

Worst Case: Uses the worst score that is attained by any strategy component in the level directly beneath.

Most Frequent: Uses the most-often received score that is attained by the strategy components in the level directly beneath.

Weighting: Uses the relative weights and the associated weight scale for the KPIs that are attached to this component. Weighting can only be used with strategy components at the lowest level branch (terminal node) of the strategy tree. Use weighting when several KPIs are attached to a strategy component and you want to specify the relative importance of each KPI.

Tie Breaker

Specify how to score components that use the assessment method *Most Frequent* in the event of a tie (for example, equal numbers of multiple assessments, such as two greens and two reds).

Specifying Attachments

Access the Strategy Component - Attachments page to include any attachments with this component.

By completing this page, when you view this component on a scorecard, the Attachments link is enabled on some pages. When you click the attachments link, the system lists the report IDs that are specified in the attachments grid. The attachment can be any file type that you can access with a URL, such as streaming video, audio, or a website. For example, you could enable employees to view a video of an executive from your organization. Report IDs must be set up in PeopleSoft Warehouse.

Report ID

Select a file to associate with this component.

This file must be established in the Reports Metadata table (PF _META_RPT_TBL). In the report metadata setup, the report launch path should always be a URL, not the physical path to the file. For example, these are valid report launch path entries:

- http://mydomain/reportpath/myfile.type
- http://www.peoplesoft.com/reports/myreport.xls
- ftp://ftpserver/reportpath/myfile.type
- ftp://ftp.peoplesoft.com/reports/myreport.xls
- gopher://gopherserver/reportpath/myfile.type
- gopher://gopher.peoplesoft.com/reports/myreport.xls

When you use Microsoft Excel files, and other file types, the system opens the specific file.

Note: You should use reports that are static in nature because the report ID is defined by report metadata, which must be updated whenever a report is modified.

Related Links

"Setting Up Record Metadata *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*"

Strategy KPIs Page

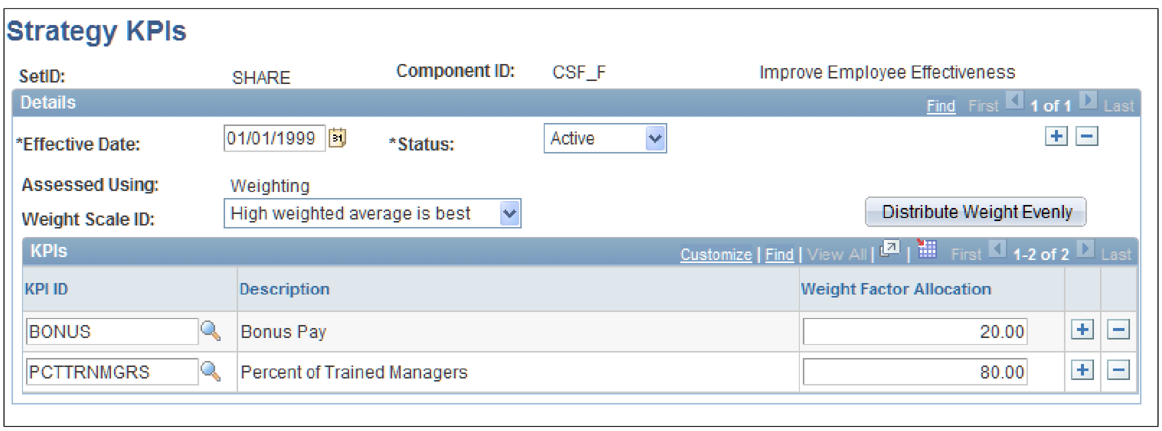
Use the Strategy KPIs page (BC_COMPNT_KPI) to specify the KPIs that belong to a strategy component.

Navigation

Scorecards, Define Strategic Goals, Strategic Comp's KPI Set

Image: Strategy KPIs page

This example illustrates the fields and controls on the Strategy KPIs page. You can find definitions for the fields and controls later on this page.



Specifying KPIs for Weighted Components

Weight Scale ID

If the component uses weighting to determine its assessment, select the defined weight scale upon which to base results.

KPI ID

In the KPIs grid, select the KPIs that are associated with this component.

Weight Factor Allocation

For each KPI, enter its relative weight (percentage based).

The total of all the KPI weight factors must equal 100.

Distribute Weight Evenly

Click to populate the Weight Factor Allocation field equally among all KPIs within the grid.

Specifying KPIs for Components Using Other Assessment Methods

KPI ID — In the KPIs grid, insert the KPIs that are associated with this component .

(Optional) Strategy Cause and Effect Page

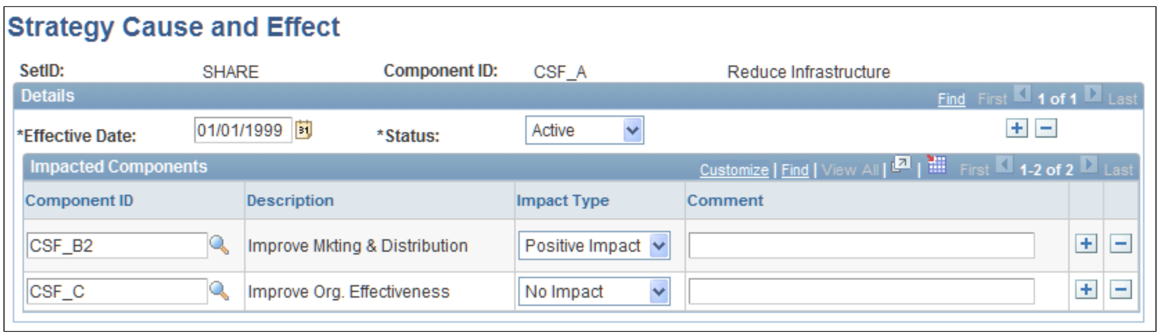
Use the Strategy Cause and Effect page (BC_CAUSE_EFF) to indicate how a component influences other components.

Navigation

Scorecards, Define Strategic Goals, Cause and Effect Set

Image: Strategy Cause and Effect page

This example illustrates the fields and controls on the Strategy Cause and Effect page. You can find definitions for the fields and controls later on this page.



This page is optional. By completing it, you can see a cause-and-effect view of the components of a scorecard, through which you can navigate to help analyze and interpret assessment results. The affected component does not need to be on the same strategy tree. This enables you to view the detail about a component that affects this strategy, but isn't necessarily part of it.

To define which components the current component affects, and how it affects them, add rows in the Impacted Components grid and complete these fields:

Component ID — Select a component that is affected by the current component.

Cause-and-effect relationships should be between the same component types; for example, between two CSFs, but not between an ST and a CSF.

Impact Type — Specify how each component in the grid is affected by the current component. Options are:

No Impact: Select if the component doesn't affect it directly, but might have some relationship that you want to track.

Positive Impact: Select if the component improves its outcome.

Negative Impact: Select if the component worsens its outcome.

Establishing Scorecards

To establish scorecards, use the Scorecard (BC_BSC_DFN1) component.

This topic discusses how to:

- Define a scorecard.
- Determine which set of KPIs and dimension members to assess.
- Specify the assessment KPIs.
- Specify the assessment dimension members.
- Attach related KPIs.
- Define the distribution list.

Pages Used to Establish Scorecards

Page Name	***Definition Name***	***Navigation***	***Usage***
Scorecard	BC_BSC_DFN	Scorecards, Define Scorecard, Scorecard	Define scorecards.
Scorecard - Assessment	BC_BSC_DFN2	Scorecards, Define Scorecard, Assessment	Specify which strategy component KPIs of the scorecard to consider when determining assessment results.
Scorecard - KPI Selection	BC_BSC_DFN3	Click View/Select KPIs on the Scorecard - Assessment page.	Specify which of the KPIs to assess for this scorecard. The default option is to assess all of the KPIs that are associated with the strategy tree components for the scorecard.
Scorecard - Dimension Member Selection	BC_BSC_DFN5	Click View/Select Dimension Members on the Scorecard - Assessment page.	Specify which dimension members to include for this scorecard. The default option is to include all of the KPI dimension members.
Scorecard - Related KPIs	BC_BSC_DFN4	Scorecards, Define Scorecard, Related KPIs	Associate KPIs with a scorecard that aren't actually part of the scorecard, but are related to it in some way.
Scorecard - Personalize For	BC_BSC_DFN6	Scorecards, Define Scorecard, Personalize For	Specify the users and roles for which to create the scorecard.

Scorecard Page

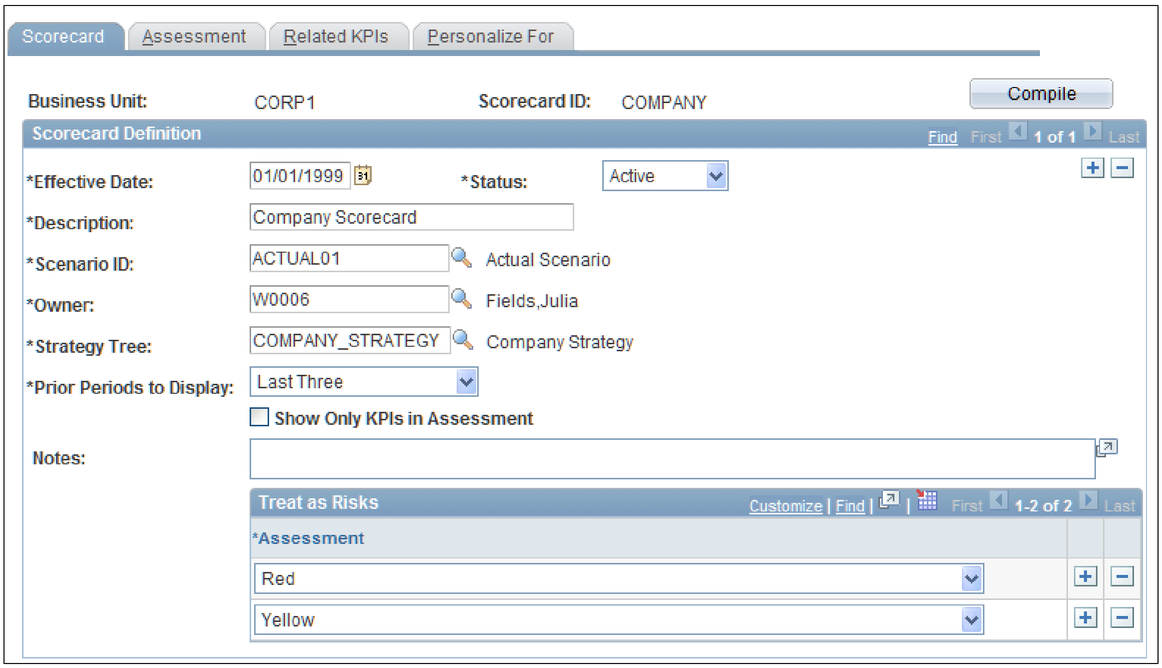
Use the Scorecard page (BC_BSC_DFN) to define scorecards.

Navigation

Scorecards, Define Scorecard, Scorecard

Image: Scorecard page

This example illustrates the fields and controls on the Scorecard page. You can find definitions for the fields and controls later on this page.



Scenario ID Select the scenario with which this scorecard is associated.

Owner Select the individual who is primarily responsible for this scorecard.

Strategy Tree Select the strategy tree on which this scorecard is based. This defines the strategy components for the scorecard.

Prior Periods to Display Select how many past calendar periods to display assessment results for. This controls how many past assessment periods appear when you view the scorecard. Values are:

Current: Display only the current period.

Last 13: Display results from the past 13 periods.

Last 6: Display results from the past 6 periods.

Last 3: Display results from the past 3 periods.

Show Only KPIs in Assessment

Select to evaluate (assess) only the KPI dimension members that are specified on the Scorecard - Assessment page. This can improve performance.

Assessment

Within the Treat as Risks grid, add rows to specify which assessments are considered exceptions, that is, assessment results that are below acceptable performance standards.

Any scorecard KPIs that receive assessments that are equivalent to those that you list here appear on the KPI List page after you click the Show Risks button when you view the scorecard results. This enables you to quickly identify potential problems.

Scorecard - Assessment Page

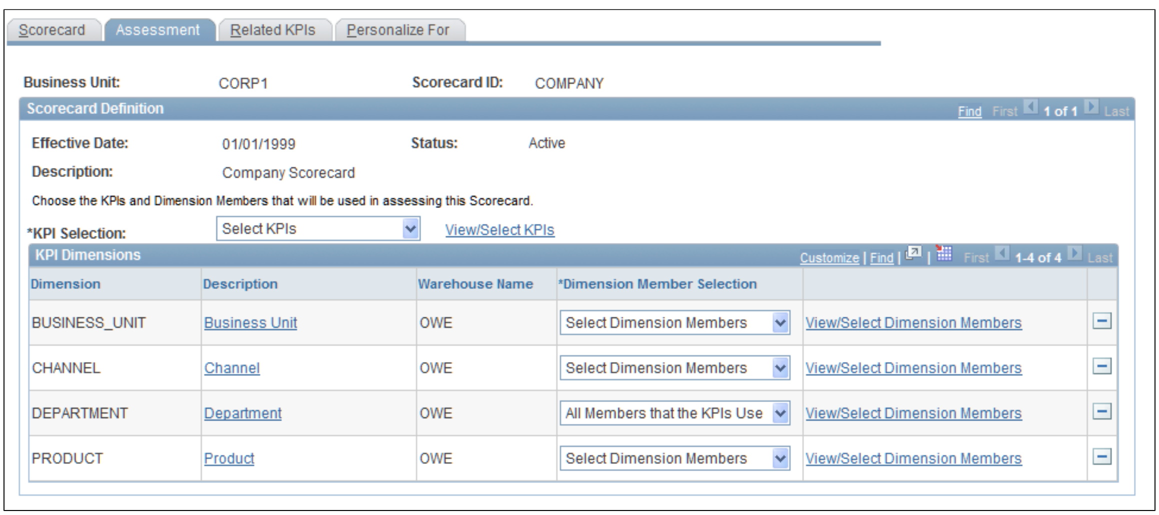
Use the Scorecard - Assessment page (BC_BSC_DFN2) to specify which strategy component KPIs of the scorecard to consider when determining assessment results.

Navigation

Scorecards, Define Scorecard, Assessment

Image: Scorecard - Assessment page

This example illustrates the fields and controls on the Scorecard - Assessment page. You can find definitions for the fields and controls later on this page.



This page controls which of the KPIs are associated with the strategy tree components of the scorecard to assess, and which of their dimension members to include.

KPI Selection

KPI Selection

Specify which KPIs to assess. Values are:

All KPIs in Strategy: Select to assess all of the KPIs that are associated with components on the scorecard strategy tree. This is the default value for this field.

	Select KPIs: Select to assess a defined subset of the KPIs that are associated with components on the scorecard strategy tree. Define the subset by clicking the View/Select KPIs link.
View/Select KPIs	Click to access the Scorecard - KPI Selection page, where you can define or view the subset of KPIs to assess. See Scorecard - KPI Selection Page.

KPI Dimensions

Use this grid to define which dimension members to include. Only dimensions from the set of KPIs that are specified in the KPI selection appear in the grid.

<dimension description>	Click to access the Dimension page, where you can review the dimension details.
Dimension Member Selection	Specify which dimension members to include. Values are: *All Members that the KPIs Use:* Select to include all of the dimension members that the KPI includes (established when the KPI is defined). *Select Dimension Members:* Select to use a subset of the dimension members. Define the subset by clicking the View/Select Dimension Members link.
View/Select Dimension Members	Click to access the Scorecard - Dimension Member Selection page, where you can define the subset of dimension members to include. See Scorecard - Related KPIs Page.

Scorecard - KPI Selection Page

Use the Scorecard - KPI Selection page (BC_BSC_DFN3) to specify which of the KPIs to assess for this scorecard.

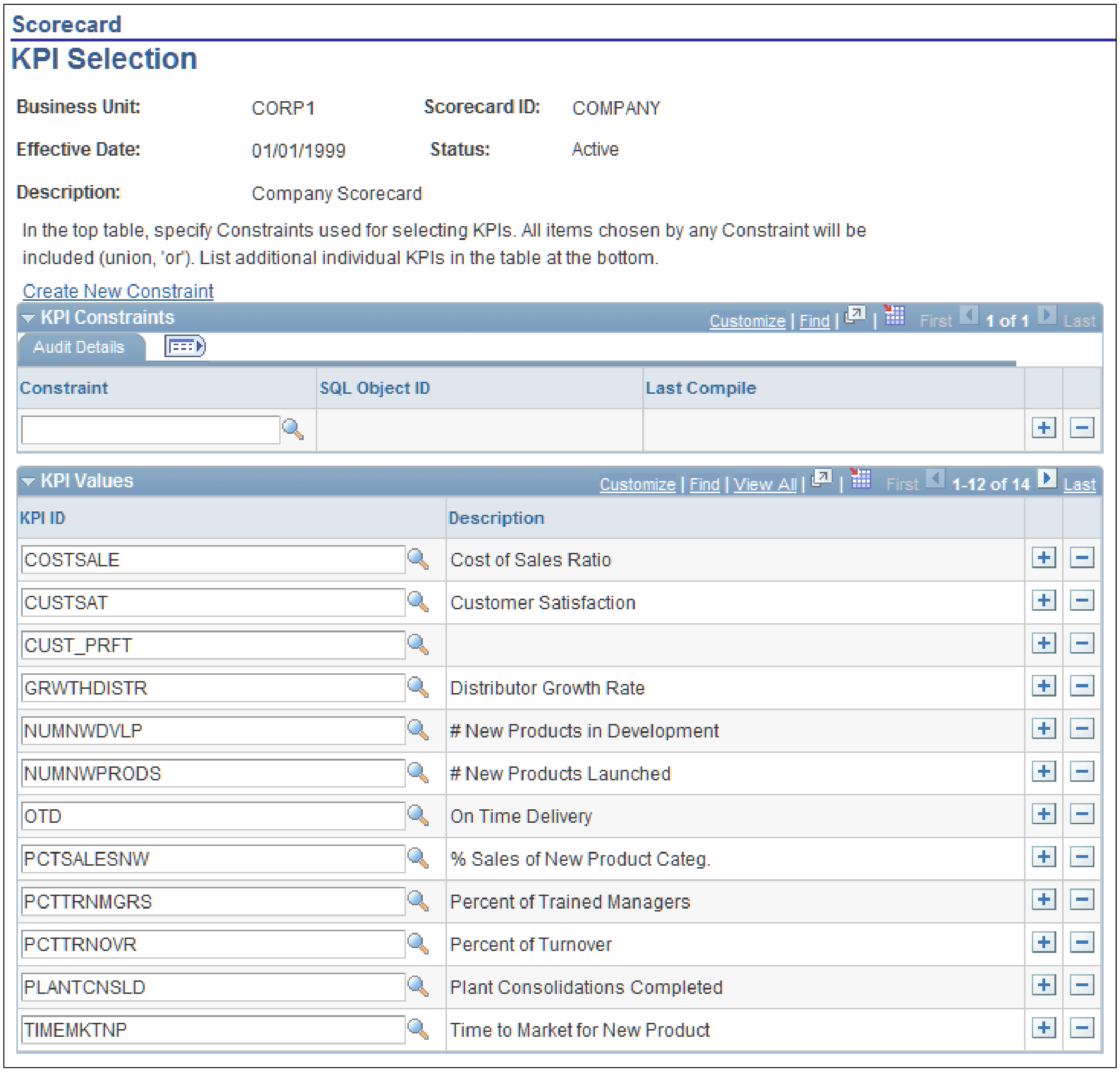
The default option is to assess all of the KPIs that are associated with the strategy tree components for the scorecard.

Navigation

Click View/Select KPIs on the Scorecard - Assessment page.

Image: Scorecard - KPI Selection page

This example illustrates the fields and controls on the Scorecard - KPI Selection page. You can find definitions for the fields and controls later on this page.



You can use constraints to define the subset of KPIs to include, specify individual KPIs, or both.

Create New Constraint Click to access the Constraint page, where you can add a new constraint.

KPI Constraints

Insert rows in this grid to specify KPIs by using a constraint.

Constraint Select the constraint by which to define a subset of KPIs.

Only constraints that are based on KPIs appear in the selection list. Constraints are established in PeopleSoft EPM.

KPI Values

Insert rows in this grid to specify individual KPIs to include.

KPI ID Select a KPI to include.

Related Links

"Setting Up Constraints *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*"

Scorecard - Dimension Member Selection Page

Use the Scorecard - Dimension Member Selection page (BC_BSC_DFN5) to specify which dimension members to include for this scorecard.

The default option is to include all of the KPI dimension members.

Navigation

Click View/Select Dimension Members on the Scorecard - Assessment page.

Image: Scorecard - Dimension Member Selection page

This example illustrates the fields and controls on the Scorecard - Dimension Member Selection page. You can find definitions for the fields and controls later on this page.

You can use constraints to define the subset of dimension members to include, specify individual dimension members, or both.

Create New Constraint Click to access the Constraint page, where you can add a new constraint.

Dimension Member Constraints

Insert rows in this grid to specify dimension members by using a constraint.

Constraint Select the constraint by which to define a subset of dimension members.

Dimension Member List

Insert rows in this grid to specify individual dimension members to include.

<dimension description> Select a dimension member to include.

Scorecard - Related KPIs Page

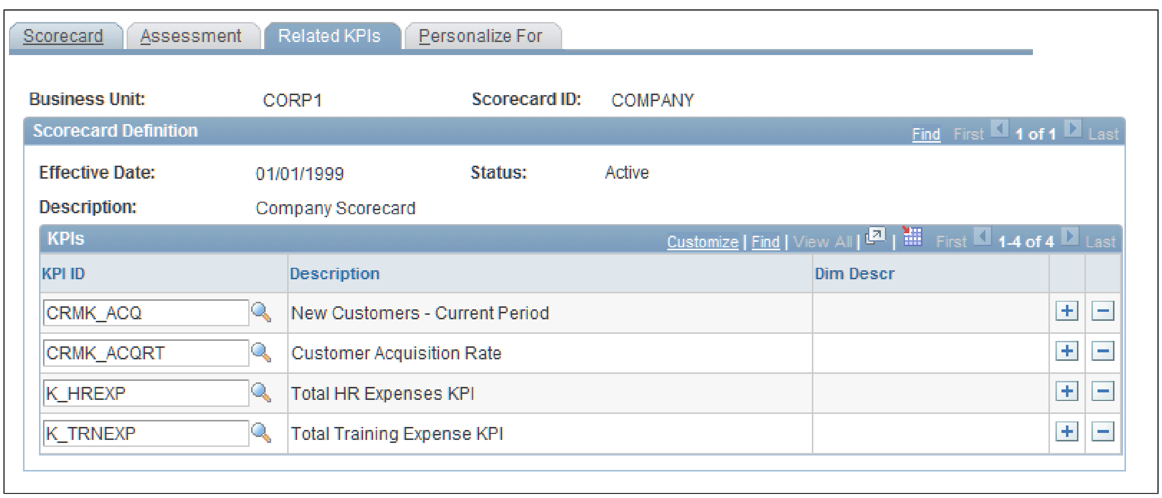
Use the Scorecard - Related KPIs page (BC_BSC_DFN4) to associate KPIs with a scorecard that aren't actually part of the scorecard, but are related to it in some way.

Navigation

Scorecards, Define Scorecard, Related KPIs

Image: Scorecard - Related KPIs page

This example illustrates the fields and controls on the Scorecard - Related KPIs page. You can find definitions for the fields and controls later on this page.



In the KPIs grid, insert rows and select the KPI ID to associate other KPIs with this scorecard. This information is used to create the View Related KPIs page and provides a way to review KPIs that are not part of the strategy tree when you view a scorecard. For example, if a KPI can have a substantial effect on the success of your strategy, but is not an integral part of that strategy, you can associate it with your scorecard here.

Note: Except for when you are using a consolidated business unit, when you view KPIs within the context of the scorecard, you do not see other business unit dimensions. You see only the business unit that matches the scorecard, even if you have security access to other business units. However, you can view across business units when monitoring scorecards using the Related KPIs page. Therefore, KPIs that have the dimension of business unit should be included as related KPIs so that users with security access to view other business units can see them.

Scorecard - Personalize For Page

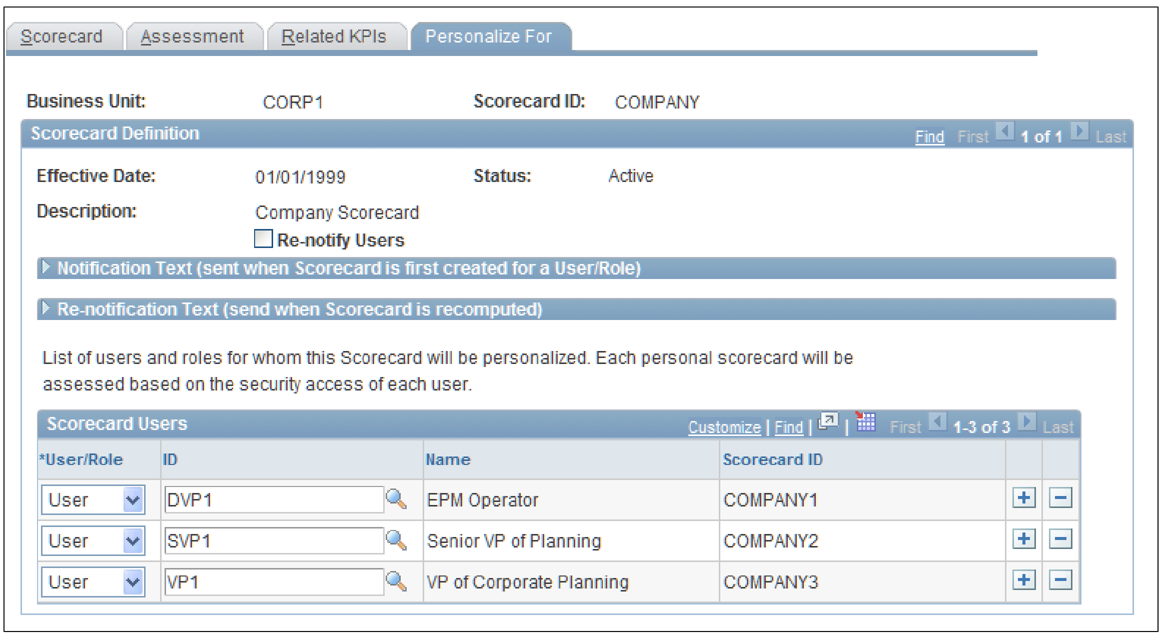
Use the Scorecard - Personalize For page (BC_BSC_DFN6) to specify the users and roles for which to create the scorecard.

Navigation

Scorecards, Define Scorecard, Personalize For

Image: Scorecard - Personalize For page

This example illustrates the fields and controls on the Scorecard - Personalize For page. You can find definitions for the fields and controls later on this page.



Re-notify Users Select to send an email notification using the text in the Re-notification Text field the next time that the scorecards are assessed.

Notification Text Enter the text for the email that is sent to users the first time that this scorecard is created for them.

Re-notification Text Enter the text for the email that is sent to all scorecard users when the scorecard is recalculated and the Re-notify Users check box is selected.

Scorecard Users

Add rows within this grid and complete the following fields to specify the users and roles for which to create the scorecard.

User/Role Select *User* to add a user, or *Role* to add a role.

ID Select the role ID or user ID.

Name Displays the description of the selected user ID or role ID.

Scorecard ID Displays the scorecard ID that the system generates.

Establishing Strategic Initiatives

To establish strategic initiatives, use the Strategic Initiatives component (BC_STRAT_INIT).

This topic discusses how to:

- Define strategic initiatives.
- Associate KPIs with strategic initiatives.
- Specify strategic initiative components.

Pages Used to Establish Strategic Initiatives

Page Name	***Definition Name***	***Navigation***	***Usage***
Strategic Initiatives - Initiative Definition	BC_STRAT_INIT	Scorecards, Define Strategic Goals, Strategic Initiative, Initiative Definition	Establish strategic initiatives.
Strategic Initiatives - Key Performance Indicators	BC_STRAT_INIT_KPI	Scorecards, Define Strategic Goals, Strategic Initiative, Key Performance Indicators	Assign KPIs to a strategic initiative.
Strategic Initiatives - Strategy Components	BC_COMPNT_INIT	Scorecards, Define Strategic Goals, Strategic Initiative, Strategy Components	Assign strategy components to a strategic initiative.

Strategic Initiatives - Initiative Definition Page

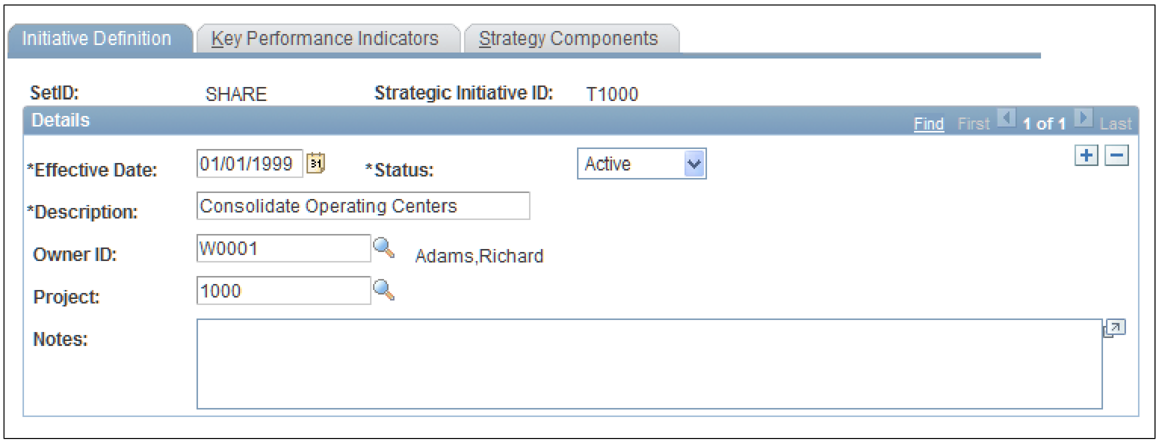
Use the Strategic Initiatives - Initiative Definition page (BC_STRAT_INIT) to establish strategic initiatives.

Navigation

Scorecards, Define Strategic Goals, Strategic Initiative, Initiative Definition

Image: Strategic Initiatives - Initiative Definition page

This example illustrates the fields and controls on the Strategic Initiatives - Initiative Definition page. You can find definitions for the fields and controls later on this page.



Owner ID	Select the owner of the strategic initiative.
Project	Enter the project that is associated with this strategic initiative.
Notes	Enter any descriptive text pertinent to the strategic initiative.

Strategic Initiatives - Key Performance Indicators Page

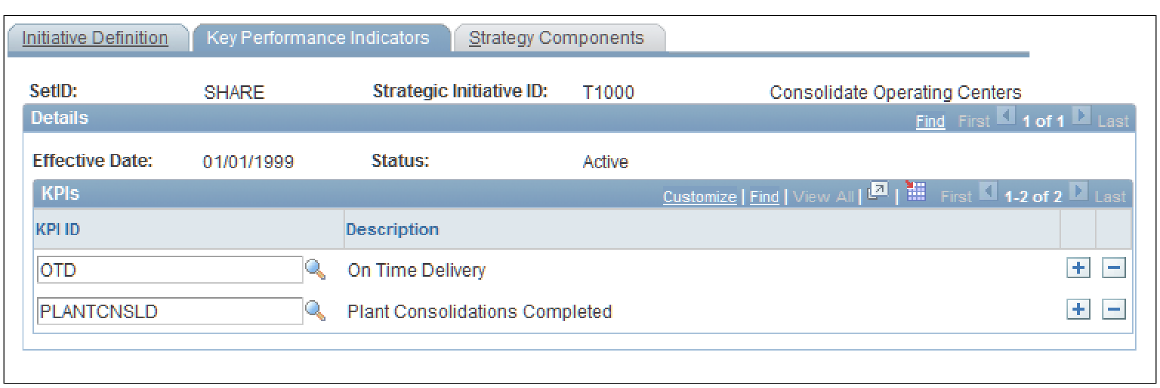
Use the Strategic Initiatives - Key Performance Indicators page (BC_STRAT_INIT_KPI) to assign KPIs to a strategic initiative.

Navigation

Scorecards, Define Strategic Goals, Strategic Initiative, Key Performance Indicators

Image: Strategic Initiatives - Key Performance Indicators page

This example illustrates the fields and controls on the Strategic Initiatives - Key Performance Indicators page. You can find definitions for the fields and controls later on this page.



In the KPIs grid, add rows and select the KPI ID to associate KPIs with this strategic initiative.

Strategic Initiatives - Strategy Components Page

Use the Strategic Initiatives - Strategy Components page (BC_COMPNT_INIT) to assign strategy components to a strategic initiative.

Navigation

Scorecards, Define Strategic Goals, Strategic Initiative, Strategy Components

Image: Strategic Initiatives - Strategy Components page

This example illustrates the fields and controls on the Strategic Initiatives - Strategy Components page. You can find definitions for the fields and controls later on this page.

In the Components grid, add rows and select the component ID to specify the components that are associated with this strategic initiative.

Creating Consolidated Scorecards

This topic provides an overview of consolidated scorecards and discusses how to establish them.

Understanding Consolidated Scorecards

You can create a scorecard that consolidates the KPIs from your individual business units into a corporate scorecard. The Business Unit Roll-Up engine, based on a business unit tree, rolls up the data element values from each subordinate business unit for the same scenario and model into the consolidated business unit, for which the system then calculates its KPIs using these values.

Establishing Consolidated Scorecards

To establish a consolidated scorecard:

1. Define a corporate business unit.

To set up this business unit, you must select the Consolidated check box on the Business Unit Definition page in the PeopleSoft Warehouse.

2. Create a business unit tree.

   This tree should depict the hierarchy among the business units that make up your organization. This tree is used to consolidate the facts. Use the delivered tree structure BUSINESS_UNIT when creating the business unit tree.

3. Define the strategy tree, components, component KPIs, and scorecard for the corporate business unit.

   Typically, these related business units use the same strategy tree, but the system does not limit you to this; related business units can use different strategy trees.

4. Run business unit rollup.

   Select EPM Foundation, Data Enrichment Tools, Roll-up Accounting Info, Business Units. For the parameters, make sure to select the BSC check box in the Products group box.

5. Run the Scorecard Assessment process.

   Use the corporate business unit as the parameter for this process.

Related Links

Understanding KPI and Scorecard Processing

"Understanding Metadata *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*"

"Processing Roll-Ups *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*"

Chapter 5

Setting Up Portfolios

Understanding Portfolios

This topic discusses:

- Scorecard portfolios.
- Key performance indicator (KPI) portfolios.
- Portfolio strategy component ranking.

Portfolios enable you to group related KPIs or scorecards for the purpose of comparing them. Portfolios are similar in concept to stock portfolios; in much the same way that an investor compares the relative performance of individual investments in her investment portfolio, users group KPIs or scorecards into a portfolio to be able to compare and contrast them. For example, a manager can define a portfolio that includes the scorecards of each of his direct reports to gauge how the entire team is doing, or a project manager can define a portfolio that comprises KPIs that measure various metrics important to project management.

A portfolio can include either scorecards or KPIs, or both. The system provides several pages for viewing portfolios: the Portfolio KPI Analysis page for KPI portfolios, the Portfolio Scorecard Analysis page for scorecard portfolios. The options that you establish when you define a portfolio control the information that appears on the portfolio view pages.

Scorecard Portfolios

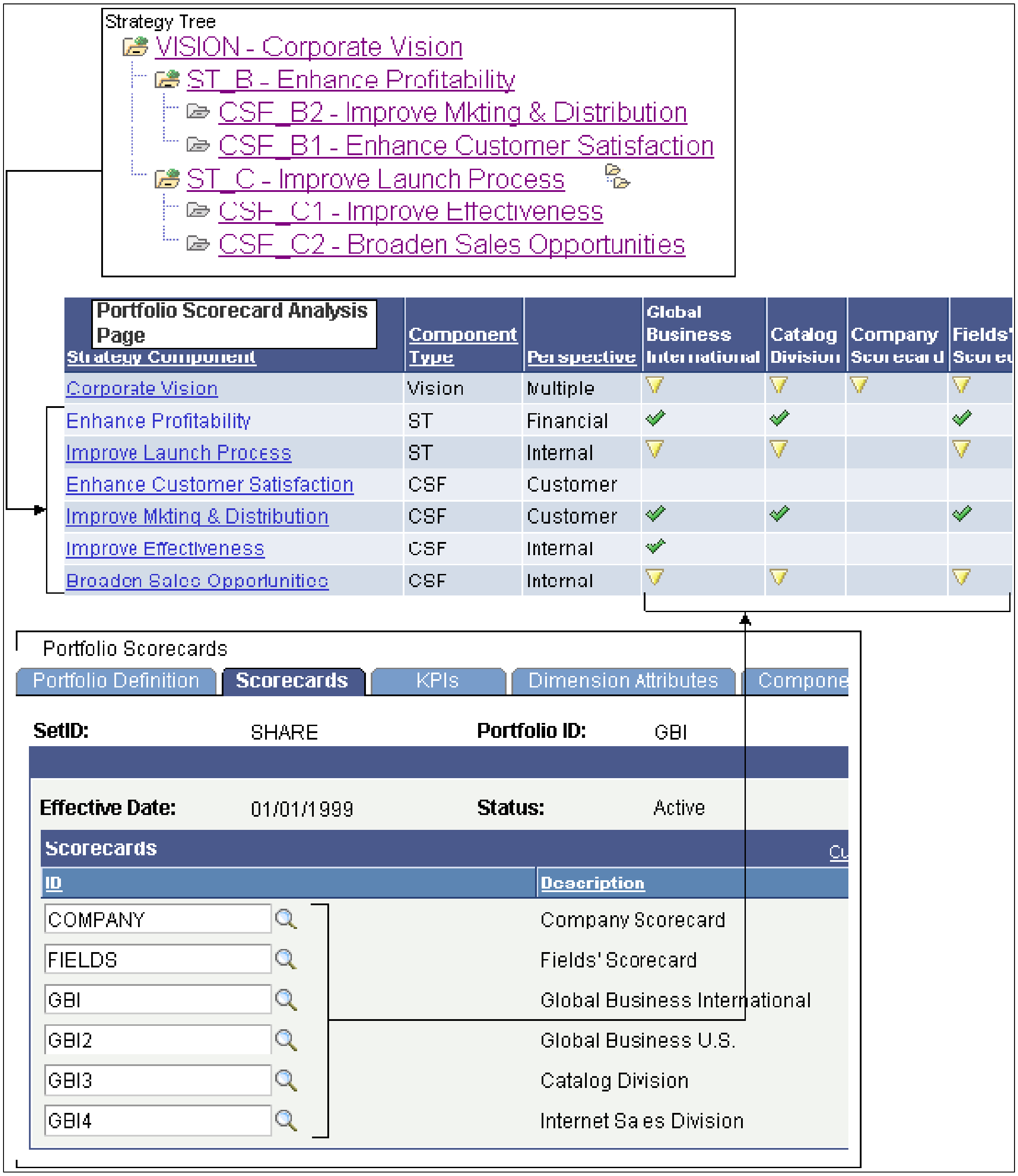
When you set up a scorecard portfolio, you specify which strategy tree it is based on and which scorecards it includes. When you view the portfolio, the portfolio strategy tree components appear as the rows on the grid, and each scorecard is listed as a column on the grid. The cells within the grid show the assessment results for that strategy component and scorecard. This provides you with an overview of how well each scorecard meets the strategic goals.

If the scorecard doesn't use the same strategy tree as that of the portfolio, then the intersecting cell for any portfolio strategy component that is not part of that particular scorecard will be blank.

This diagram shows how the portfolio strategy tree and the portfolio's scorecards appear in the grid of the Portfolio Scorecard Analysis page:

Image: How strategy tree and scorecards are used to generate the Portfolio Scorecard Analysis page grid

How strategy tree and scorecards are used to generate the Portfolio Scorecard Analysis page grid



Scorecard Portfolio Setup Steps

To set up a scorecard portfolio, complete these steps:

1. Specify a name, description, and strategy tree for the portfolio.

2. Specify which scorecards to include.

3. (Optional) Rank the portfolio's strategy components and calculate their scores.

KPI Portfolios

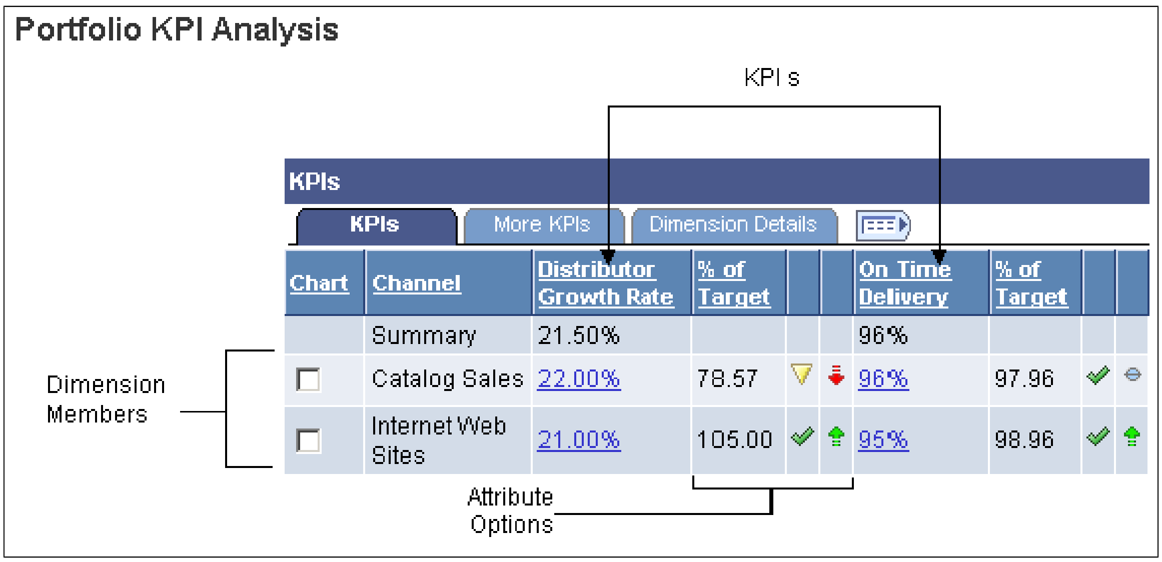
KPI portfolios enable you to group KPIs of the same dimension to compare and contrast their assessment results. The KPIs *must* all be from the same dimension. KPI portfolios can include composite and standard KPIs.

When you view a KPI portfolio, the grid displays the portfolio's KPIs as the columns of the grid, and the portfolio's KPI dimension members as the rows of the grid. This provides you with an overview of how well each KPI dimension member is performing for each KPI. For each KPI, you can choose whether to display any of the following attributes in the columns next to that KPI: percent of target, assessment results, or trend. The KPI Portfolio Analysis page also includes a bubble chart that plots the data of KPIs that you specify as the x-axis, y-axis, and z-axis (bubble size), and bubble color values.

This diagram shows how these parameters appear in the grid of the Portfolio KPI Analysis page:

Image: Portfolio KPI Analysis grid

Portfolio KPI Analysis grid



KPI Portfolio Setup Steps

To set up a KPI portfolio, complete these steps:

1. Specify a name, description, and tree for the portfolio.

2. Specify which KPIs to include, how to summarize each KPI, which attributes to show for each KPI, and which KPIs to use as chart data.

   The KPIs must all be the same dimension type. After you select the first KPI, the system limits additional selections to only KPIs that use the same dimension.

3. Specify which dimension members to include, using one of these methods:

- Select each dimension member from a list.
- Define a rule that retrieves the dimension members.

  Use the Dim Member Select (dimension member selection) page to define the rule.

4. (Optional) Select additional data from the dimension to appear on the Portfolio KPI Analysis page.

   For example, if the KPI portfolio is based on the project dimension, you could include the project start date, project end date, and project owner fields.

5. (Optional) Rank the portfolio's strategy components and calculate their scores.

Portfolio Strategy Component Ranking

You can rank a portfolio's strategy components against each other to determine a score that indicates the relative weight of each component. These scores are used in some PeopleSoft applications that are scorecard-based, such as PeopleSoft Project Portfolio Management. You rank each component by completing a grid. Rankings can be relative, absolute, or a mixture of both.

Relative rankings compare components to each other. The system automatically assigns the opposite rank to the compared component. For example, if you rank component A *HIGH* when compared to component B, then the system would automatically set the rank for component B to *LOW* when being compared to component A, assuming *LOW* was established as the opposite rank of *HIGH.*

Absolute ranking uses a scale such as *A, B, C, D* to rank components independently.

Before you can rank components you need to set up the rankings and define their numeric value. You also need to define an opposite for any rankings that are used as relative ranks.

Related Links

Portfolio Scorecard Analysis Page
Portfolio KPI Analysis Page

Establishing Ranking Definitions

To establish ranking definitions, use the Component Ranking Definition component (BC_CMPNT_RANK_DFN).

This topic discusses how to:

- Define component ranking values.
- Define ranking opposites.

Pages Used to Establish Ranking Definitions

Page Name	***Definition Name***	***Navigation***	***Usage***
Component Ranking Definition	BC_CMPNT_RANK_DFN	Scorecards, Administration, Portfolio Objects, Component Ranking	Define rank IDs to use for strategy component ranking.
Opposite Component Rank	BC_CMPNT_RANK_MAP	Scorecards, Administration, Portfolio Objects, Opposite Component Rank	Define rank ID opposites.

Component Ranking Definition Page

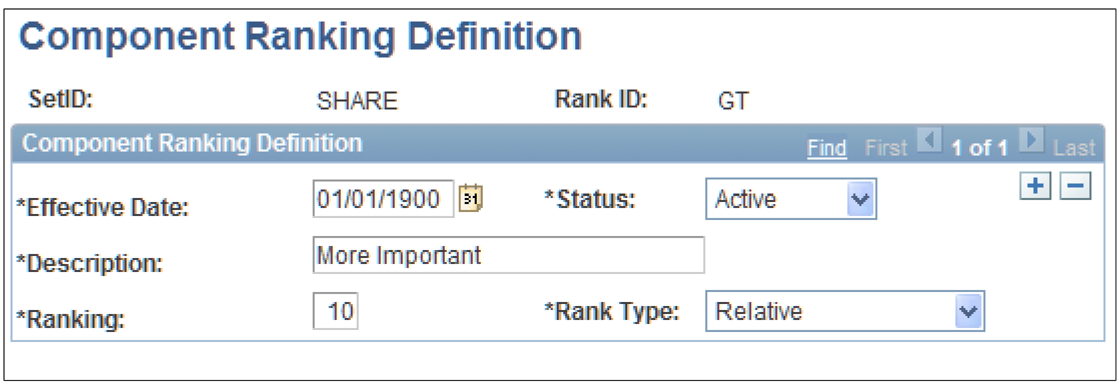
Use the Component Ranking Definition page (BC_CMPNT_RANK_DFN) to define rank IDs to use for strategy component ranking.

Navigation

Scorecards, Administration, Portfolio Objects, Component Ranking

Image: Component Ranking Definition page

This example illustrates the fields and controls on the Component Ranking Definition page. You can find definitions for the fields and controls later on this page.



Description

Enter a description for the ranking.

This description is the text that appears as a selection in the drop-down list box for rankings on the Portfolio Definition - Component Weighting page.

Ranking

Enter the numeric value for this ranking. Higher values indicate more importance or better results. For example, you might enter a value of 90 as the ranking for rank ID A, and a value of 50 for rank ID F, if you were setting up a ranking system similar to a grading scale.

Rank Type

Specify the rank type. Options are:

Relative: Select if this ranking is used to rank components against each other. The system automatically assigns the opposite rank ID for the component against which you are ranking, so you must define opposites for this rank ID.

Absolute: Select this option if you are ranking based on a scale. An example of these rankings might be *LOW, MODERATE,* and *HIGH.*

Both: Select this option when this ranking is used as if it were either a relative or an absolute value. With this option an opposite must be defined for this rank ID.

Opposite Component Rank Page

Use the Opposite Component Rank page (BC_CMPNT_RANK_MAP) to define rank ID opposites.

Navigation

Scorecards, Administration, Portfolio Objects, Opposite Component Rank

Image: Opposite Component Rank page

This example illustrates the fields and controls on the Opposite Component Rank page. You can find definitions for the fields and controls later on this page.

Opposite Rank ID

Select the rank ID that is the opposite of this ranking.

The values available depend on the rankings that are defined in the Component Ranking Definition page.

Establishing Dimension Member Selection Rules

This topic discusses how to:

- Define dimension member selection rules.
- Define an advanced rule.
- Preview dimension member IDs.

Pages Used to Establish Dimension Member Selection Rules

Page Name	***Definition Name***	***Navigation***	***Usage***
Dim Member Select (dimension member selection)	BC_KPI_FILTER	• Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Dim Member Select • Click the Create Selection Rule link or the View Selection Rule link on the Portfolio Definition - Dimension Member Selection page.	Create or modify a rule that specifies which dimension members to include in a portfolio.
Dim Member Select - Advanced Selection (dimension member selection - advanced selection)	BC_KPI_FILTER_ADV	Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Advanced Selection	Extend the selection rule by specifying criteria for fields that are outside of the dimension.
Dim Member Select - Dim Member Preview (Dimension member selection - dimension member preview)	BC_KPI_FILTER_VIEW	Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Dim Member Preview	Preview the list of dimension members that are retrieved by this selection rule.

Dim Member Select Page

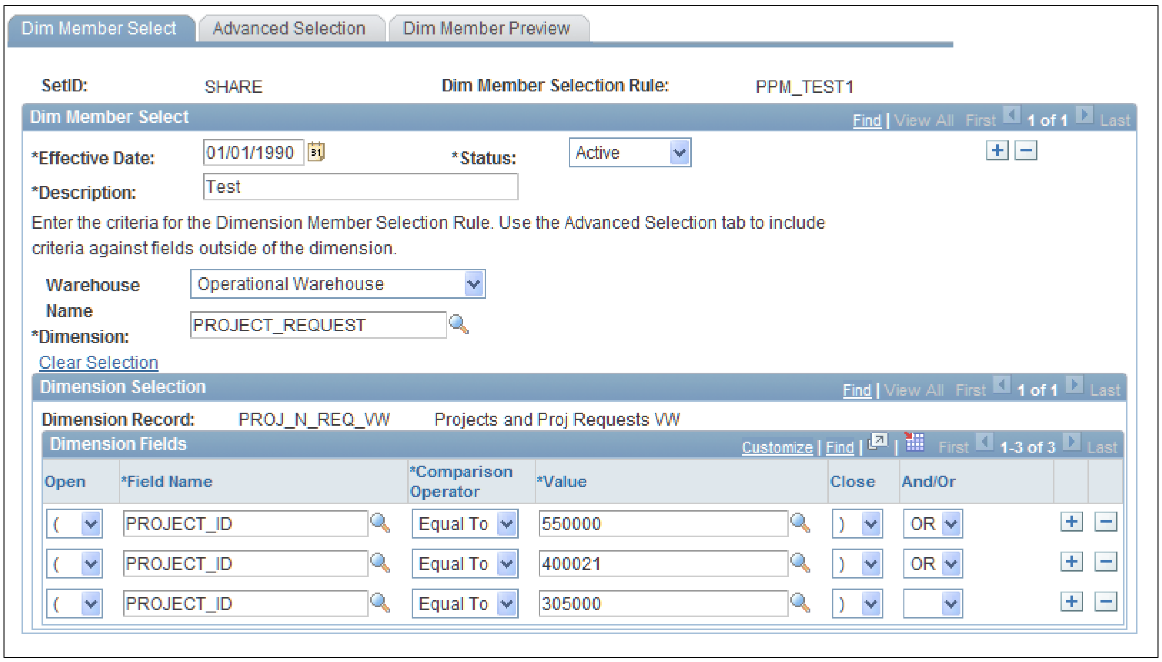
Use the Dim Member Select (dimension member selection) page (BC_KPI_FILTER) to create or modify a rule that specifies which dimension members to include in a portfolio.

Navigation

- Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Dim Member Select
- Click the Create Selection Rule link or the View Selection Rule link on the Portfolio Definition - Dimension Member Selection page.

Image: Dim Member Select page

This example illustrates the fields and controls on the Dim Member Select page . You can find definitions for the fields and controls later on this page.



Dimension Select the dimension for the selection rule.

Clear Selection Click this link to clear the current selection criteria.

Dimension Selection

Insert rows as needed to compose the criteria used for the rule.

Open and Close Select the number of opening or closing parentheses needed for the selection criteria.

Field Name Select the field to use for the filter criteria.

Comparison Operator Select the operator to use as selection criteria. Values are:

Equal To

Greater Than.

Greater Than or Equal To.

Less Than.

Less Than or Equal To.

Equal To.

is Like: Like the comparison value. Valid only for character type fields that have no associated lookup tables. The system programmatically appends a wildcard to the end of the lookup value that you enter.

is Not Like: Not like the comparison value. Valid only for character type fields that have no associated lookup tables. The system programmatically appends a wildcard to the end of the lookup value that you enter.

Not Equal To.

Value Enter or select the comparison value.

And/Or Select either *AND* or *OR* to relate one line to the next of the filter criteria.

Dim Member Select - Advanced Selection Page

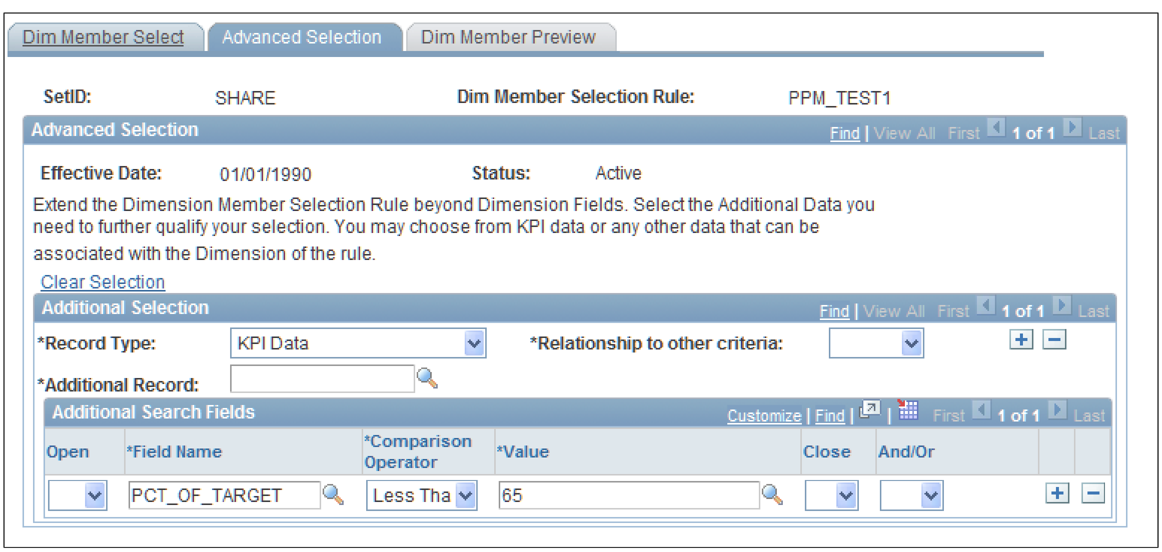
Use the Dim Member Select - Advanced Selection (dimension member selection - advanced selection) page (BC_KPI_FILTER_ADV) to extend the selection rule by specifying criteria for fields that are outside of the dimension.

Navigation

Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Advanced Selection

Image: Dim Member Select - Advanced Selection page

This example illustrates the fields and controls on the Dim Member Select - Advanced Selection page. You can find definitions for the fields and controls later on this page.



To extend the selection rule to additional dimension fields, insert one or more Additional Selection sections and specify additional data and criteria to further qualify your selection. You can use KPI data or other data that can be associated with the dimension of this rule. For example, you could define an advanced rule to limit your projects to those that have a negative trend.

Clear Selection	Click to clear the current selection criteria.

Additional Selection

Record Type	Specify the type of record to use. Options are: *Associate with Dimension:* Select to use records from dimension data for this filter. *KPI Data:* Select to use KPI records for this filter. Your selection controls which records appear in the selection list for the Additional Record field.
Additional Record	Select the record upon which to base your additional criteria.
Relationship to other criteria	Indicate how this criteria is used with respect to the other criteria, either *And* or *Or.*

Additional Search Fields

Insert rows to specify the criteria. These fields are described in the page description for the Dim Member Select page.

See Portfolio KPI Analysis Page.

Dim Member Select - Dim Member Preview Page

Use the Dim Member Select - Dim Member Preview (Dimension member selection - dimension member preview) page (BC_KPI_FILTER_VIEW) to preview the list of dimension members that are retrieved by this selection rule.

Navigation

Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Dim Member Preview

Preview Parameters

Enter the parameters for viewing the dimension members that this rule retrieves by completing the fields and clicking Show Results.

Dimension Members

This grid displays the dimension members that are retrieved by the rule for the specified parameters.

Establishing Portfolios

This topic discusses how to:

- Define portfolios.
- Associate scorecards with portfolios.
- Associate KPIs with portfolios.
- (Optional) Include additional fields in KPI portfolios.
- Rank portfolio strategy components.
- Specify portfolio dimension members.

Pages Used to Establish Portfolios

Page Name	***Definition Name***	***Navigation***	***Usage***
Portfolio Definition	BC_PORTFOLIO_DFN	Scorecards, Define Portfolio, Portfolio Definition	Create a portfolio definition and identify the tree on which it is based.
Portfolio Definition - Scorecards	BC_PORTFLIO_BSC	Scorecards, Define Portfolio, Scorecards	Associate scorecards with a portfolio.
Portfolio Definition - KPIs	BC_PORTFLIO_KPI	Scorecards, Define Portfolio, KPIs	Associate KPIs with a portfolio.
Portfolio Definition - Dimension Attributes	BC_PORTFLIO_COL	Scorecards, Define Portfolio, Dimension Attributes	Define optional dimension fields to appear on the Portfolio KPI Analysis page.
Portfolio Definition - Component Weighting	BC_PORTFLIO_CMP	Scorecards, Define Portfolio, Component Weighting	Rank the relative importance of each strategy component.
Portfolio Definition - Dimension Member Selection	BC_PORTFLIO_OBJ	Scorecards, Define Portfolio, Dimension Member Selection	Specify which dimension members to include in the portfolio.

Related Links

Portfolio KPI Analysis Page

Portfolio Definition Page

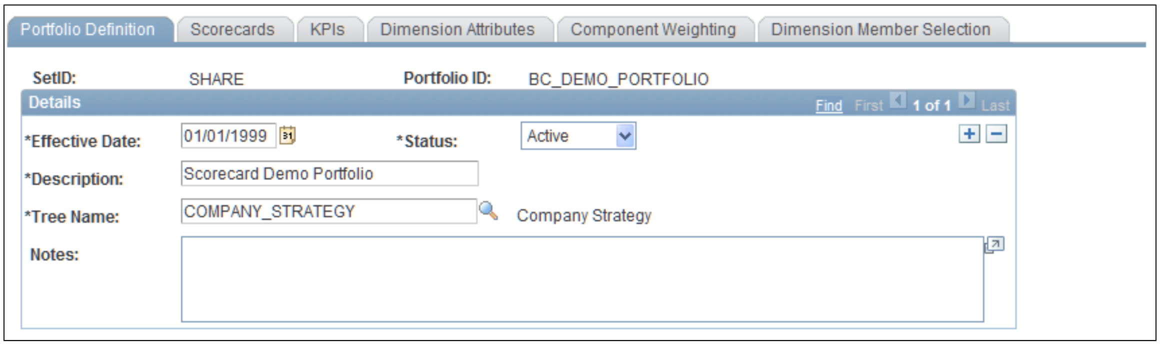
Use the Portfolio Definition page (BC_PORTFOLIO_DFN) to create a portfolio definition and identify the tree on which it is based.

Navigation

Scorecards, Define Portfolio, Portfolio Definition

Image: Portfolio Definition page

This example illustrates the fields and controls on the Portfolio Definition page. You can find definitions for the fields and controls later on this page.



Description

Enter a description for the portfolio.

Tree Name

Select the tree used by the portfolio. This tree determines the components that appear in the component weighting page.

Portfolio Definition - Scorecards Page

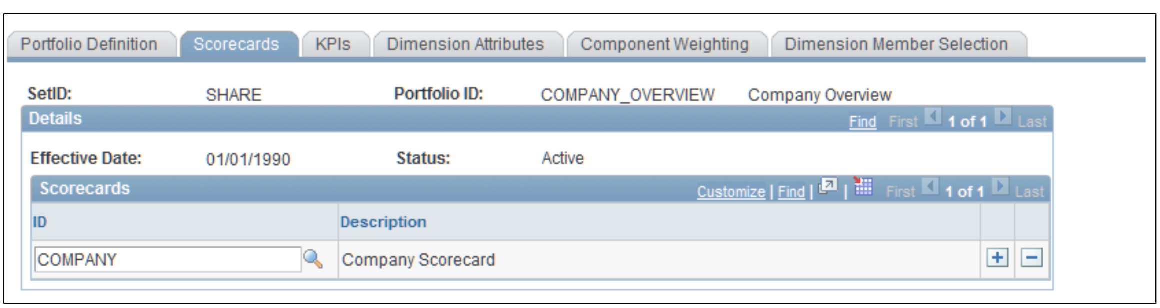
Use the Portfolio Definition - Scorecards page (BC_PORTFLIO_BSC) to associate scorecards with a portfolio.

Navigation

Scorecards, Define Portfolio, Scorecards

Image: Portfolio Definition - Scorecards page

This example illustrates the fields and controls on the Portfolio Definition - Scorecards page. You can find definitions for the fields and controls later on this page.



ID (scorecard ID)

Within the Scorecards grid, add rows as needed and select the scorecards to include in this portfolio.

The scorecards that are available are those associated with all business units that belong to the specified SetID.

Portfolio Definition - KPIs Page

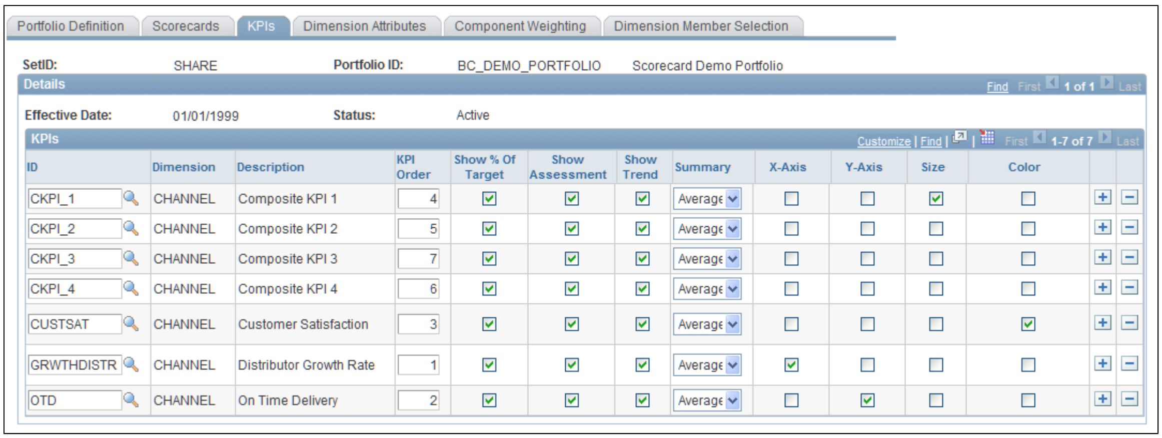
Use the Portfolio Definition - KPIs page (BC_PORTFLIO_KPI) to associate KPIs with a portfolio.

Navigation

Scorecards, Define Portfolio, KPIs

Image: Portfolio Definition - KPIs page

This example illustrates the fields and controls on the Portfolio Definition - KPIs page. You can find definitions for the fields and controls later on this page.



Portfolio Definition | Scorecards | KPIs | Dimension Attributes | Component Weighting | Dimension Member Selection

SetID: SHARE Portfolio ID: BC_DEMO_PORTFOLIO Scorecard Demo Portfolio

Details — Find First 1 of 1 Last

Effective Date: 01/01/1999 Status: Active

KPIs — Customize | Find | First 1-7 of 7 Last

ID	Dimension	Description	KPI Order	Show % Of Target	Show Assessment	Show Trend	Summary	X-Axis	Y-Axis	Size	Color
CKPI_1	CHANNEL	Composite KPI 1	4	☑	☑	☑	Average	☐	☐	☑	☐
CKPI_2	CHANNEL	Composite KPI 2	5	☑	☑	☑	Average	☐	☐	☐	☐
CKPI_3	CHANNEL	Composite KPI 3	7	☑	☑	☑	Average	☐	☐	☐	☐
CKPI_4	CHANNEL	Composite KPI 4	6	☑	☑	☑	Average	☐	☐	☐	☐
CUSTSAT	CHANNEL	Customer Satisfaction	3	☑	☑	☑	Average	☐	☐	☐	☑
GRWTHDISTR	CHANNEL	Distributor Growth Rate	1	☑	☑	☑	Average	☑	☐	☐	☐
OTD	CHANNEL	On Time Delivery	2	☑	☑	☑	Average	☐	☑	☐	☐

Within the KPIs grid, add rows as needed and complete these fields to associate KPIs with this portfolio:

ID (KPI ID) — Select KPIs to include. The KPIs *must* all be from the same dimension.

After you insert the first KPI, only KPIs that use that same dimension appear in the selection list.

KPI Order — Enter an integer to specify in which column of the Portfolio KPI Analysis page this KPI appears.

Show % Of Target (show percentage of target) — Select to display percentage of target for this KPI on the Portfolio KPI Analysis page.

Show Assessment — Select to display assessment results for this KPI on the Portfolio KPI Analysis page.

Show Trend — Select to display the performance trend for this KPI on the Portfolio KPI Analysis page.

Summary — For each KPI, indicate how to summarize the data that appears in the summary row of the Portfolio KPI Analysis page. Options are:

Sum: Select to display the sum of this KPI's data in the summary row.

Average: Select to display the average of this KPI's data in the summary row.

X-Axis and Y-Axis

Select to specify that the data for this KPI is plotted on the x-axis or y-axis of the chart on the Portfolio KPI Analysis page.

You are limited to a single x-axis and a single y-axis selection within the grid.

(Optional) Size

Select to use the data for this KPI as the bubble size on the Portfolio KPI Analysis page.

If you leave this field blank, the system uses the x-axis KPI data for the size. You are limited to a single size selection within the grid.

(Optional) Color

Select to use the KPI in this row to determine the default color on the Portfolio KPI Analysis page.

If you leave this field blank, the system uses the y-axis KPI data for the color. You are limited to a single color selection within the grid.

(Optional) Portfolio Definition - Dimension Attributes Page

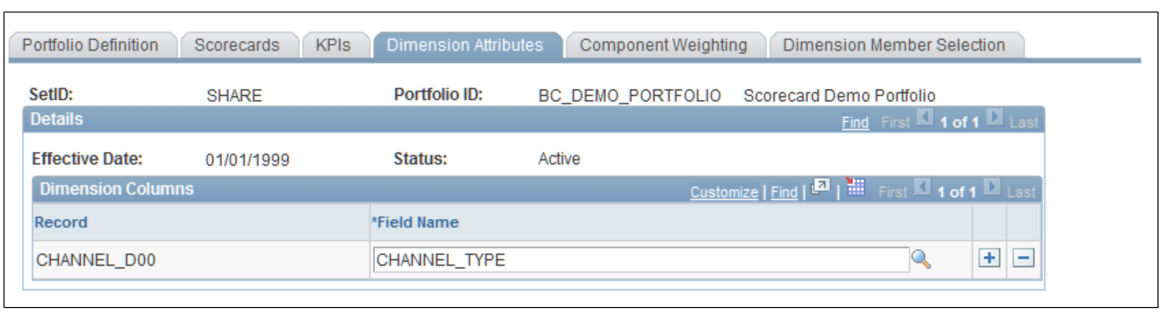
Use the Portfolio Definition - Dimension Attributes page (BC_PORTFLIO_COL) to define optional dimension fields to appear on the Portfolio KPI Analysis page.

Navigation

Scorecards, Define Portfolio, Dimension Attributes

Image: Portfolio Definition - Dimension Attributes page

This example illustrates the fields and controls on the Portfolio Definition - Dimension Attributes page. You can find definitions for the fields and controls later on this page.



Add rows as needed to specify which additional fields appear on the Portfolio KPI Analysis page. These fields appear on the Dimension Details tab. The valid values depend on the dimension of the KPIs in the portfolio.

Portfolio Definition - Component Weighting Page

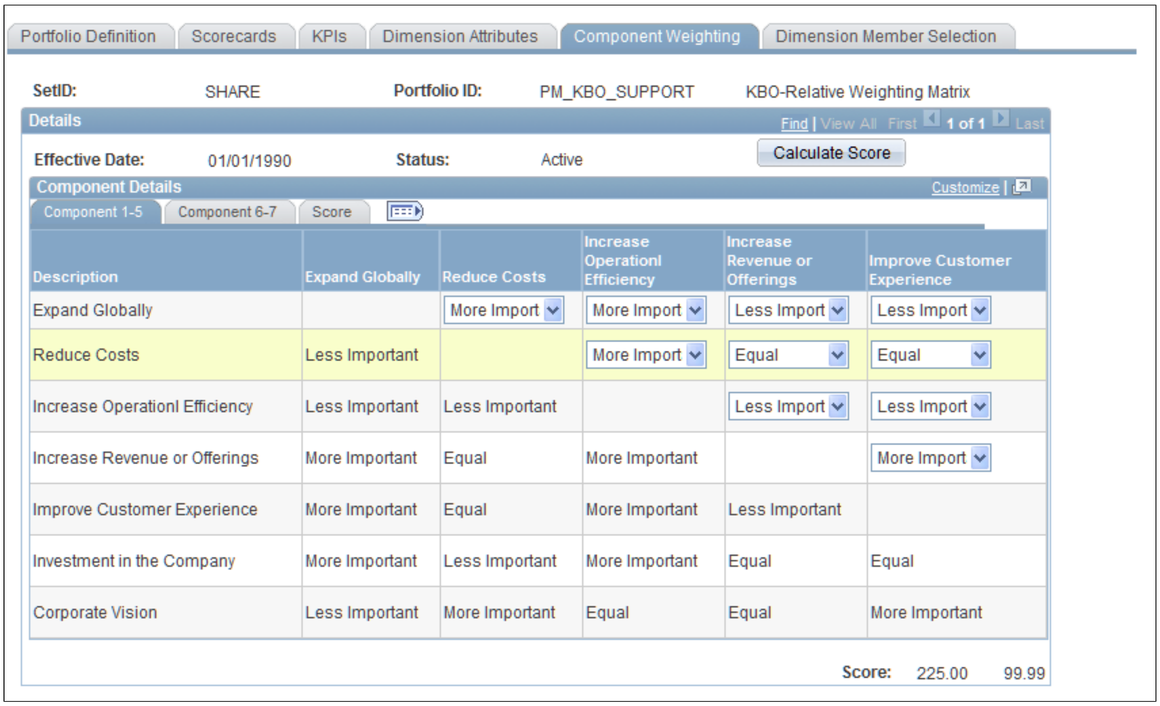
Use the Portfolio Definition - Component Weighting page (BC_PORTFLIO_CMP) to rank the relative importance of each strategy component.

Navigation

Scorecards, Define Portfolio, Component Weighting

Image: Portfolio Definition - Component Weighting page

This example illustrates the fields and controls on the Portfolio Definition - Component Weighting page. You can find definitions for the fields and controls later on this page.



The columns and rows on this page display the components of the tree (the tree nodes) on which the portfolio is based, as defined on the Portfolio Definition page. Each component is listed in both a row and a column within the matrix, so that each component can be ranked against every other component.

To rank the components and determine their scores:

1. For each pair of components that you rank, select a value in the drop-down list box at the intersecting cell in the grid.

   You are ranking the component in the row against the component in the column. In the example shown, the component *Grow The Business* has been ranked as more important than the component *Transform the Business.* You are not required to rank every pair of components. In cases in which you are using relative ranks, the system automatically fills in the appropriate opposite rank, as defined on the Opposite Component Rank page. You must establish the valid rankings and their numerical equivalents using the Component Ranking Definition page prior to using them on this page.

   This page might have multiple tabs to accommodate every strategy component. Access each tab to rank that set of components, or view them all in a scrollable grid by clicking the View All button.

2. Click the Calculate Score button to display the raw score and weight (weighted score) on the Score tab.

   The score and weight for each component appear in the last two columns of the grid.

   The score that is displayed is the sum of the numeric equivalents for values selected for each component pair. The weight is the percentage of the total score calculated for the score in any given row. Therefore, the total weight is always slightly less than or equal to 100.

Related Links

Establishing Ranking Definitions

Portfolio Definition - Dimension Member Selection Page

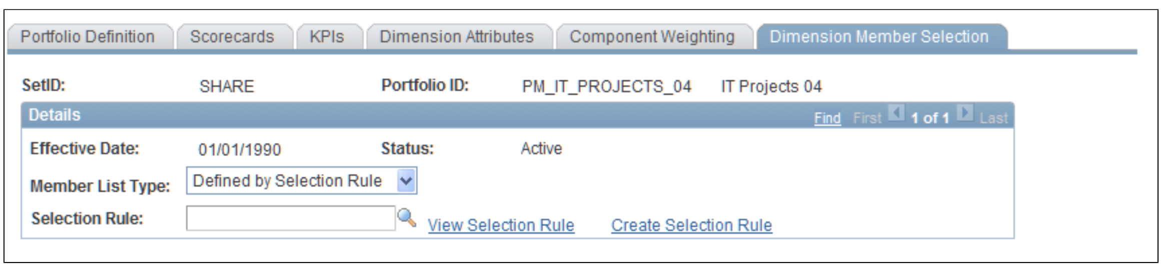
Use the Portfolio Definition - Dimension Member Selection page (BC_PORTFLIO_OBJ) to specify which dimension members to include in the portfolio.

Navigation

Scorecards, Define Portfolio, Dimension Member Selection

Image: Portfolio Definition - Dimension Member Selection page

This example illustrates the fields and controls on the Portfolio Definition - Dimension Member Selection page. You can find definitions for the fields and controls later on this page.



You can define the dimension members by specifying each ID individually, or by using a rule. The appearance of this page differs depending on the option that you choose.

Member List Type	Specify how to define the dimension members. Options are: *Defined by Dimension Member:* Select to specify each dimension member by its ID, and then add rows in the Dimension Members grid and select the project requests to include. *Defined by Selection Rule:* Select to use a rule that defines which project requests to include. Specify the rule to use in the Selection Rule field.
Selection Rule	Select the rule that defines which dimension members to select. This field is unavailable for entry unless the Member List Type field is set to *Defined by Selection Rule.*

View Selection Rule

Click to access the Dim Member Select page and review the rule. This link is available only when the Member List Type field is set to *Defined by Selection Rule.*

Create Selection Rule

Click to access the Dim Member Select page and add a new rule. This link is available only when the Member List Type field is set to *Defined by Selection Rule.*

Chapter 6

Processing KPIs and Scorecards

Understanding KPI and Scorecard Processing

This topic discusses:

- Engines used.
- Delivered jobstreams.
- KPI processing.
- Scorecard processing.

After KPI and scorecard setup is complete, processing takes place through PeopleSoft EPM. This topic assumes that you are already familiar with run controls, jobstreams, and process scheduler. Review your PeopleSoft EPM Foundation and PeopleTools documentation if these are unfamiliar terms.

This topic provides an overview of *both* the KPI and scorecard processes. KPIs must be processed prior to processing scorecards. However, be aware that if you process scorecards using the delivered jobstreams, you may not need to run the KPI Analyze jobstream independently, as it is included in the BC_ANALYZE jobstream for scorecard assessment.

The scorecard and KPI processes both use several different PeopleSoft Application Engine programs. This section lists the engines used and the jobstream definitions that we provide with the system. These jobstreams are used to initiate the processing from PeopleSoft EPM.

Engines Used

PeopleSoft Enterprise Performance Management applications use engines to run each process. Engine metadata is delivered with the system; unless you're revising the application you shouldn't need to modify it. This metadata stores information about the various PeopleSoft Application Engine programs that are used within an engine. The following table lists the delivered engines that are used by PeopleSoft Scorecard when processing KPIs and scorecards using the delivered jobstreams and their associated jobs:

Engine ID	***Description***	***Usage***
KPI_CALC	KPI Manager engine	Main KPI Calculation engine. Called from other engines (KPI_ANALYZ and engines that are used by other EPM analytic applications that use KPIs) to calculate KPI dimension members, compare them to their targets, determine the assessment results, and publish KPIs.

Engine ID	***Description***	***Usage***
KPI_ANALYZ	KPI Analyze engine	KPI analysis engine. Calls the KPI_ CALC engine to calculate and assess KPI dimension members.
KPI_ACTION	KPI Action Publish engine	Processes defined KPI actions based on the assessment results.
BSC_ASSESS	Scorecard Assessment engine	Main scorecard processing engine. Evaluates the assessments of scorecard KPIs, and based on the assessment methods that are defined, scores each strategy component.
BSC_MANUAL	Scorecard Manual Assessment engine	Incorporates the assessment override values that are entered on the scorecard viewer to determine the updated scores for each strategy component.
MERGE	Merge engine	Moves enriched data from the temporary tables that are used during processing into the permanent fact tables. In most jobstreams, the Merge engine is the last job.

The Merge engine is used by many applications within the PeopleSoft Enterprise Performance Management suite. It moves enriched data from temporary tables into the final permanent tables for use as input for other processes. In most jobstreams, the Merge engine is the last job. (The exception to this rule is when you use the POST job last in the jobstream.) During processing, data is copied into temporary tables. When processing is complete, the final tables are updated.

Delivered Jobstreams

Each main engine is associated with a job ID using the Job Metadata page. Jobs are associated with a jobstream using the Jobstream page. A job must be unique across all jobstreams, so if you require additional jobstreams, you first need to create new jobs to use in each jobstream. The following table lists each batch process, the delivered jobstream, and the engines and job IDs that are used in that jobstream:

Process	***Description***	***Delivered Jobstream ID***	***Engines Used (Engine ID)***	***Job IDs in Jobstream***
KPI Analysis	Calculates and assesses KPIs.	KP_ANALYZE	• KPI_ANALYZ • KPI_ACTION • MERGE	• KP_CALC • KP_NOTIFY • KP_MERGE
KPI Action Notification	Processes actions to take (emails or worklist entries) due to assessment results.	KP_ALERT	• KPI_ACTION • MERGE	• KP_NOTIFY2 • KP_MERGE2

Process	***Description***	***Delivered Jobstream ID***	***Engines Used (Engine ID)***	***Job IDs in Jobstream***
Scorecard Assessment	Calculates and assesses KPIs and assesses scorecards.	BC_ANALYZE	• KPI_ANALYZ • BSC_ASSESS • KPI_ACTION • MERGE	• BC_KP_CALC • BC_ASSESS • BC_NOTIFY • BC_MERGE
Scorecard-Only Assessment	Assesses scorecards *only* (does not include KPI processing).	BC_ASSESS	• BSC_ASSESS • KPI_ACTION • MERGE	• BC_ASSESS2 • BC_NOTIFY3 • BC_MERGE3
Apply Manual Assessments	Uses the manually entered assessment values to assess the scorecard.	BC_OVRASMT	• BSC_MANUAL • KPI_ACTION • MERGE	• BC_MANUAL • BC_NOTIFY2 • BC_MERGE2

KPI Processing

The KPI Analysis jobstream (KP_ANALYZE) resolves the value of key performance indicators, evaluates the KPI dimension members against their targets, and assigns the achieved assessment. Based on the business rules that you associate with a KPI, each KPI is given an assessment, or rating, that you use to identify out-of-tolerance conditions or performance opportunities. KPI Analysis is a batch process that you initiate by submitting a run control request. This process comprises several PeopleSoft Application Engine programs. You specify which business unit, scenario, and fiscal year and period ranges to process.

Note: You don't need to run the KPI Analysis jobstream by itself if you use the BC_ANALYZE jobstream to run the scorecard assessment process, because it includes the KPI_ANALYZ engine. However, you may want to run KPI Analysis independently when initially establishing your KPIs to verify that they are set up correctly.

The KPI Analysis jobstream consists of these general steps (this is a simplified description of what actually occurs):

1. The system retrieves the KPI data elements that are used from the PeopleSoft EPM tables.
2. The system retrieves the appropriate data, using the SQL built by the data element definitions and related calculation definitions.
3. The system calculates the KPIs:
    - For calculated KPIs, the engine uses the SQL that is generated from the assigned calculation ID to process and calculate the data and determine the results.
    - For those KPIs that are derived from other KPIs (defined by the KPI Type field on the KPI Definition page), the values for the source KPIs are determined first; then the derived KPIs are assigned those values.

Source KPIs are *not* assessed in the current run; they must be previously assessed for use with derived KPIs.

- Manual KPIs are not calculated.

  You must enter their values prior to running KPI analyze or scorecard assessment.

- For KPIs that have a dimension tree defined (hierarchical KPIs), the system calculates the values for each node.

4. The system determines assessment results for each KPI dimension member:
   - The system retrieves and calculates the target value for each KPI dimension member.
   - Each KPI dimension member is evaluated against its target, or the default target table, and given the appropriate assessment ID based on the target rules.
5. If any composite KPIs are defined, then the system calculates and assesses the composite KPIs.
6. The system determines and processes any actions that are required (sends emails or populates worklists) as a result of the assessment.
7. KPI information is published (if the option is selected on the KPI Options page).
8. When the process is complete, the information is merged from temporary tables to these permanent fact tables: KP_KPI_CALC_F00, KP_KPI_ASMT_F00, KP_DATAVALS_F00, and KP_TRGTVALS_F00.

The system uses the following tables during KPI analysis processing:

Tables Accessed
KP_CALC_DFN
KP_CALC_FLDS
KP_CALC_RULE
KP_DATAELEM_DFN
KP_KPI_DFN
KP_KPI_MANL_TBL
KP_KPI_MANL_HIST
PF_FREQ_TBL
PF_FREQ_SEQ
PF_FREQ_DTL
KP_KPI_OBJ

Tables Accessed
KP_KPI_OBJ_EFF
KP_KPI_TRGT_TBL
KP_KPI_TRGT_TME
KP_KPI_TRGT_SEQ
KP-_ASSESS_DFN
BC_BU_SCENARIO
KP_ACTIVITY_DFN
KP_ACT_ACTIVITY
KP_CMPSTE_EFF
KP_CMPSTE_KPI
KP_RUN_JOBSTRM
KP_KPI_RUN_GROUP
KP_RUN_GRP_RLE
KP_RUN_GRP_FY
KP_RUN_GRP_KPI
, KP_KPI_FAMILY
KP_KPI_FMLY_DTL

Fact Tables Updated
KP_KPI_CALC_F00
KP_KPI_ASMT_F00
KP_DATAVALS_F00
KP_TRGTVALS_F00
KP_OBJ_RULE_F00
KP_KPI_NODE_F00
KP_KPI_NODE_S00

Note: This does not include the supporting PeopleSoft EPM tables that the system accesses: the scenario tables, the calendar tables, the metadata tables (record, tablemap, datamap, constraint, engine metadata, job metadata, jobstream metadata), record suite tables, process tables, and so on.

Scorecard Processing

The delivered jobstreams for processing scorecards are:

- BC_ANALYZE.

  Assesses KPIs and scorecards, which determines the scores for the components of a scorecard. You must run this prior to viewing a scorecard.

- BC_ASSESS

  Assesses *only* scorecards.

  Typically you will use this jobstream only when you've made changes to scorecards, but not the underlying KPIs. If the KPI data has also changed you should run BC_ANALYZE to process both KPIs and scorecards.

- BC_OVRASMT

  Applies manual assessments.

  When viewing scorecards, you can override the assessments if you have the appropriate security. This jobstream updates the scorecard by applying the manually entered assessments and reevaluating the scores for each component.

Scorecard Assessment

During scorecard assessment processing, these steps occur:

1. The system calculates and assesses KPIs.

   (This depends on which scorecard assessment jobstream you run. Of the jobstreams that we provide, BC_ANALYZE does this step because it includes the KPI_ANALYZ engine; BC_ASSESS does not.)

2. The system generates scorecards for each user and role user that is specified on the distribution list.

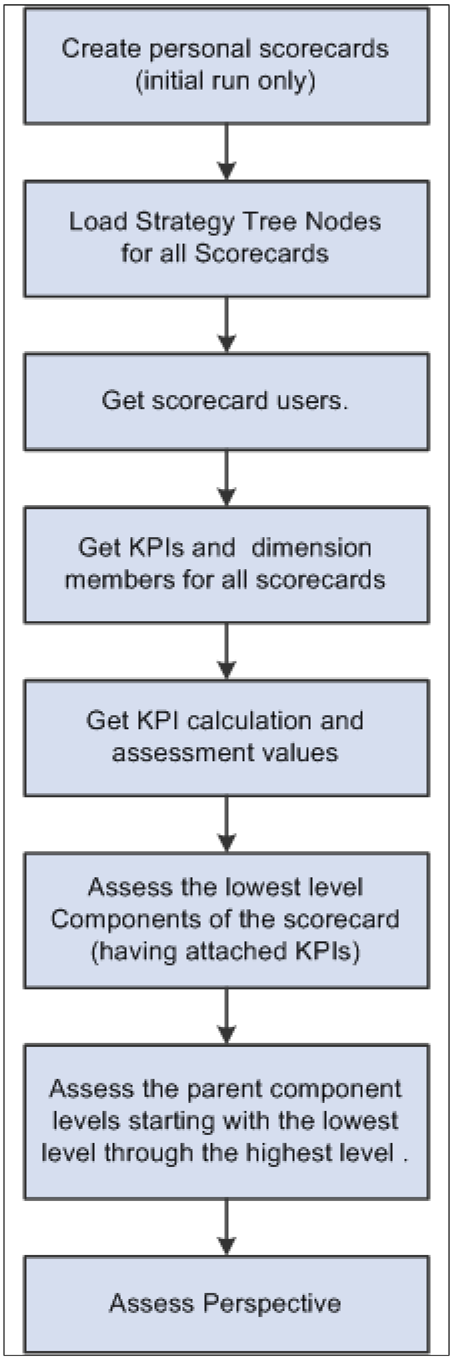
3. The system scores each strategy component, based on the assessment method that is defined on the Component Definition page.

4. The system merges the information from temporary tables to these permanent fact tables: BC_ASSESS_F00 and BC_PRSPCTV_F00.

The following diagram provides an overview of process flow for scorecard assessments, which includes creating personal scorecards, loading strategy tree nodes, getting scorecard users, getting KPIs and dimension members for all scorecards, getting KPI calculation and assessment values, assessing the lowest level scorecard components, assessing the parent component levels, and assessing perspectives.

Image: Process flow for scorecard assessment

Process flow for scorecard assessment



These tables are used during processing:

Tables Accessed
KP_KPI_DFN

Tables Accessed
KP_KPI_OBJ
KP_KPI_OBJ_EFF
KP_WEIGHT_TBL
KP_WEIGHT_SEQ
PF_FREQ_TBL
PF_FREQ_SEQ
PF_FREQ_DTL
BC_BSC_DFN
BC_BSC_ASMT_DIM
BC_BSC_ASMT_KPI
BC_BSC_ASMT_DTL
BC_BSC_NOTIFY
BC_BSC_PLIST
BC_BSC_RENOTIFY
BC_CMPNT_KPI
BC_COMPONENT
BC_CPNT_KPI_PRT
KP_ASSESS_DFN
PF_SY_OPR_EMPL
PSOPRCLS

Fact Tables Updated
BC_ASSESS_F00
BC_PRSPCTV_F00

This lists only those tables that are used by scorecard assessment. The tables that are affected by KPI assessment are listed in the KPI processing section.

Note: This list does not include the supporting PeopleSoft EPM tables that the system accesses: the scenario tables, the calendar tables, the metadata tables (record, tablemap, datamap, constraint, engine metadata, job metadata, jobstream metadata), record suite tables, process tables, and so on.

Manual Assessments

If you enter manual assessments when viewing a scorecard, run the Apply Manual Assessments jobstream (BC_OVRASMT) to apply those assessments and update your strategy component scores.

During manual assessment processing, these steps occur:

1. The system updates the KPI assessment using the manual assessment values.

2. The system reevaluates the strategy components.

3. The system merges the information from temporary tables to these permanent fact tables: BC_ASSESS_F00, KP_KPI_OVRD_F00, KP_KPI_ASMT_F00, and BC_PRSPCTV_F00.

The following tables are used during processing:

Tables Accessed
KP_KPI_DFN
KP_KPI_MANL_TBL
KP_KPI_MANL_HIST
KP_KPI_OBJ
KP_KPI_OBJ_EFF
KP_WEIGHT_TBL
KP_WEIGHT_SEQ
PF_FREQ_TBL
PF_FREQ_SEQ
PF_FREQ_DTL
KP_KPI_TRGT_TBL
KP_KPI_TRGT_TME
KP_ASSESS_DFN
BC_BU_SCENARIO
BC_BSC_DFN

Tables Accessed
BC_BSC_ASMT_DIM
BC_BSC_ASMT_KPI
BC_BSC_ASMT_DTL
BC_BSC_NOTIFY
BC_BSC_PLIST
BC_BSC_RENOTIFY
BC_CMPNT_KPI
BC_COMPONENT
BC_CPNT_KPI_PRT
KP_ASSESS_DFN
PF_SYS_OPR_EMPL
PSOPRCLS
KP_CMPSTE_EFF
KP_CMPSTE_KPI

Fact Tables Updated
BC_ASSESS_F00
KP_KPI_OVRD_F00
KP_KPI_ASMT_F00
BC_PRSPCTV_F00

Note: This list does not include the supporting PeopleSoft EPM tables that the system accesses: the scenario tables, the calendar tables, the metadata tables (record, tablemap, datamap, constraint, engine metadata, job metadata, jobstream metadata), record suite tables, process tables, and so on.

Related Links

KPI Processing

Assessment Methods

Establishing KPIs

Understanding KPI and Scorecard Processing
"Understanding Jobstreams *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*"

Processing KPIs

This topic provides an overview of KPI run groups and discusses how to:

- Define KPI run groups.
- Run KPI processing.

Pages Used to Process KPIs

Page Name	*Definition Name*	*Navigation*	*Usage*
KPI Run Group	KP_KPI_RUN_GROUP	Key Performance Indicators, Administration, Calculate, KPI Run Group	Define KPI run groups.
Run KPI Processing	KP_RUN_JOBSTREAM	Key Performance Indicators, Administration, Calculate, Calculation and Assessment	Process KPIs.

Understanding KPI Run Groups

KPI run groups enable you to define a subset of KPIs to process. You can opt to use a KPI run group when you process KPIs to save processing time. Typically you will use KPI run groups during the implementation phase when you are setting up your KPI definitions and want to validate them by running the KPI Analysis process and reviewing the results. If you do not use a KPI run group when processing KPIs, then *all* KPIs that satisfy the input run parameters are processed.

To define the KPIs that compose a KPI run group, you can use a combination of one or more of the following:

- A constraint that is based on the KPI Definition table.
- A specific individual KPI.
- A KPI family.

KPI Run Group Page

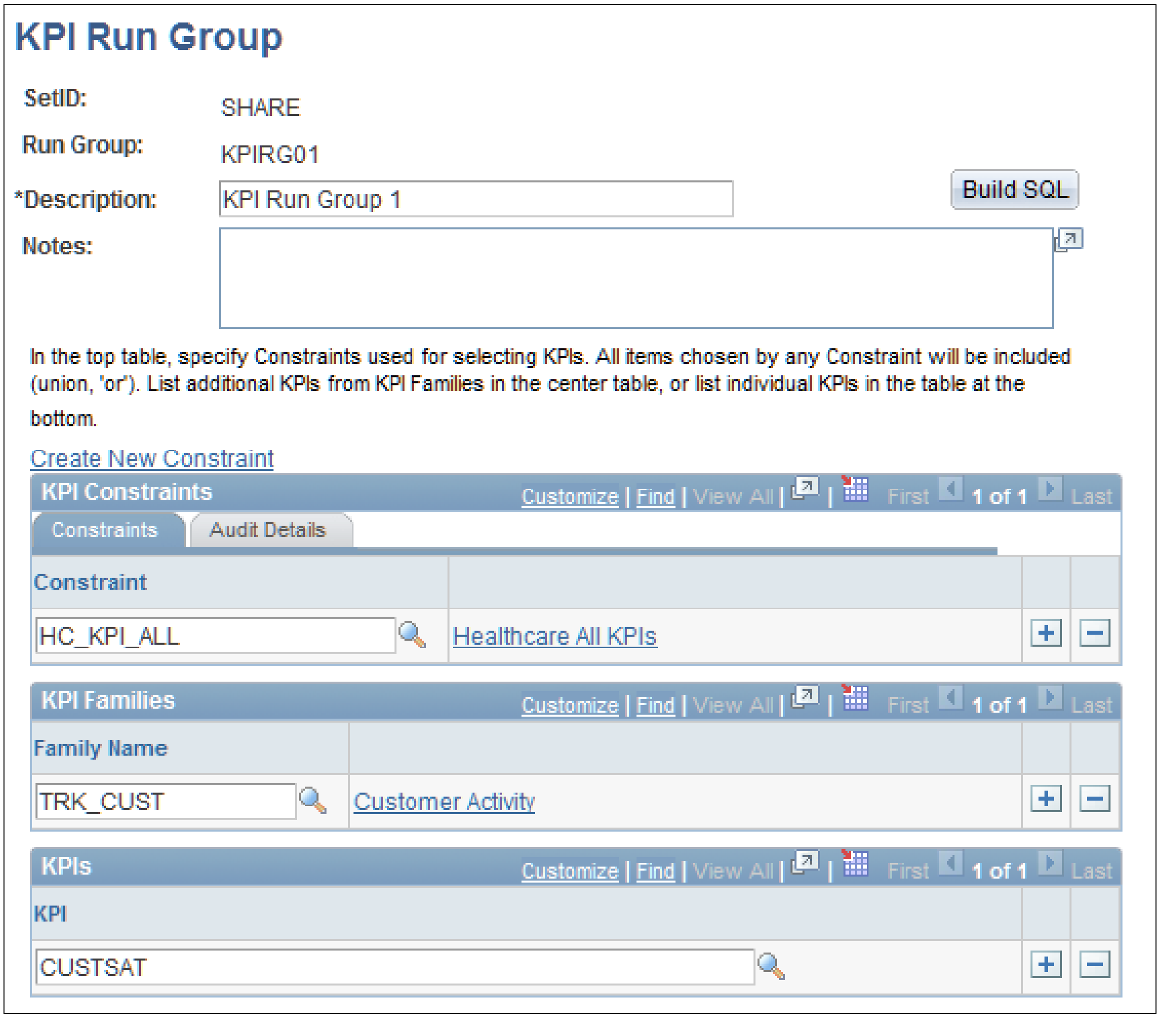
Use the KPI Run Group page (KP_KPI_RUN_GROUP) to define KPI run groups.

Navigation

Key Performance Indicators, Administration, Calculate, KPI Run Group

Image: KPI Run Group page

This example illustrates the fields and controls on the KPI Run Group page. You can find definitions for the fields and controls later on this page.



Build SQL

Click to update the SQL for a KPI run group that uses a constraint. This is only required if the constraint definition that is used for the KPI Run Group has been modified. When you initially create a KPI run group that uses a constraint, when you save the definition the system generates the appropriate SQL for the constraint. However, if you subsequently modify the constraint definition that is used for a KPI Run Group, you must click this button to update the associated SQL because the Save button will be unavailable.

See "Running Mass Compile *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*".

Create New Constraint Click this link to access the Constraint page in Add mode, where you can add a new KPI-based constraint to associate with this KPI run group.

See "Setting Up Constraints *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*".

To specify the KPIs that compose the KPI run group, add rows within one or more of the following grids:

KPI Constraints - Constraints Tab

Constraint Select a KPI-based constraint to include the KPIs that are defined by that constraint within the KPI group. The list of available values is limited to only the constraints that are built on the KPI Definition table

<constraint description> Click to access the Constraint page, where you can review or update the constraint definition.

Preview Values Click to access the Get Dimension Members page, where you can preview the KPI dimension members that are defined by this constraint.

KPI Constraints - Audit Details Tab

SQL Object ID The identifier of the SQL object that the system generates for the constraint. This field will not contain any values until you click the Build SQL button.

Last Compile The date and time the SQL object was generated.

KPI Families

Family Name Specify a KPI family to include its KPIs in this KPI run group.

<KPI family description> Click to access the KPI Family page, where you can review the details of the KPI family.

KPIs

KPI Specify a KPI to include in this KPI run group.

Dimension The dimension for the KPI. Click to access the Dimension component in update/display mode, where you can review the details of the dimension.

<KPI description> Click to access the KPI Definition component for the KPI in update/display mode, where you can review the KPI details.

Run KPI Processing Page

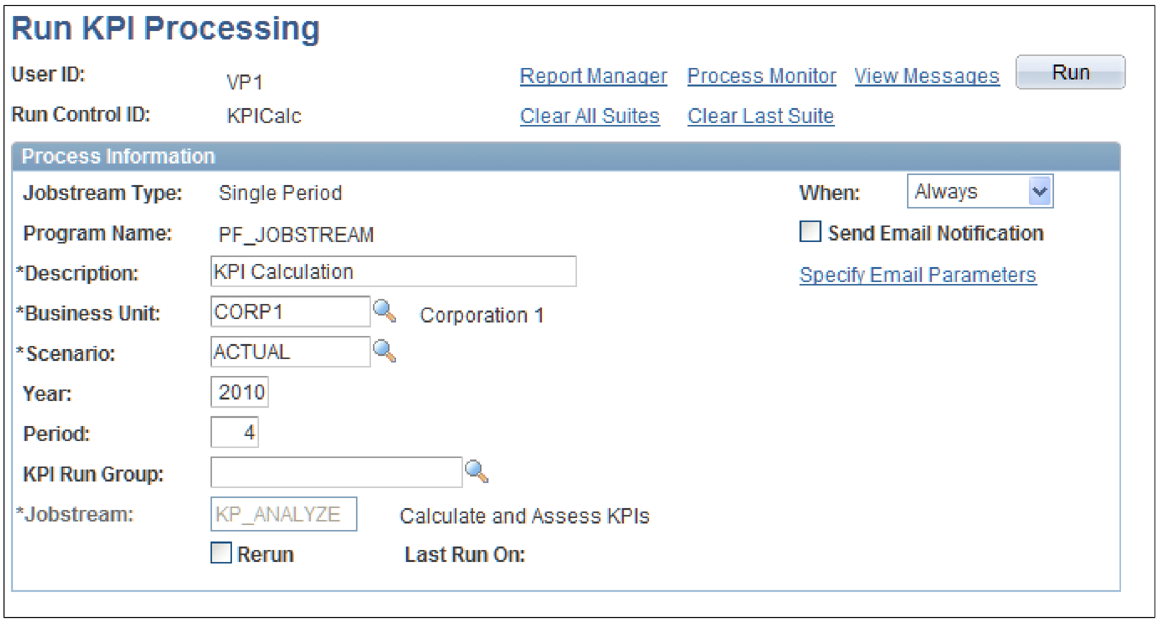
Use the Run KPI Processing page (KP_RUN_JOBSTREAM) to process KPIs.

Navigation

Key Performance Indicators, Administration, Calculate, Calculation and Assessment

Image: Run KPI Processing page

This example illustrates the fields and controls on the Run KPI Processing page. You can find definitions for the fields and controls later on this page.



Jobstream Type

This field is unavailable for entry, and contains *Single Period* as the engine can be run only for a single period.

Business Unit and Scenario

Specify the business unit and scenario to process.

Year and Period

Specify the fiscal year and period for which to calculate and assess KPIs.

KPI Run Group

Optionally, select a KPI run group to limit processing to a subset of KPIs. To establish KPI run groups, use the KPI Run Group page.

See KPI Run Group Page.

Jobstream ID

This field contains *KP_ANALYZE,* which is the delivered jobstream for processing KPIs.

Processing Scorecards

This topic discusses how to run scorecard processing.

Pages Used to Process Scorecards

Page Name	*Definition Name*	*Navigation*	*Usage*
Run Jobstream	RUN_PF_JOBSTREAM	• Scorecards, Administration, Assessments, Scorecard Assessment • Scorecards, Administration, Assessments, Manual Assessments • EPM Foundation, Job Processing, Update/Run Jobstreams, Run Jobstream	Runs a jobstream for a single fiscal year and period.
Run Multiple Jobstream	RUN_PF_MULTIPERIOD	EPM Foundation, Job Processing, Update/Run Jobstreams, Run Multiple Jobstream	Runs a jobstream for a time frame that spans a range of fiscal years or periods.

Run Jobstream Page

Use the Run Jobstream page (RUN_PF_JOBSTREAM) to runs a jobstream for a single fiscal year and period.

Navigation

- Scorecards, Administration, Assessments, Scorecard Assessment
- Scorecards, Administration, Assessments, Manual Assessments
- EPM Foundation, Job Processing, Update/Run Jobstreams, Run Jobstream

Complete the run parameter fields:

Unit and Scenario ID	Specify the business unit and scenario to process.
Fiscal Year and Period	Specify the time frame to process if running a single jobstream.
From Year, From Period and To Year, and To Period	Enter the date range to process if running multiple jobstreams.
Jobstream ID	Select the jobstream to run. The delivered, predefined jobstreams for scorecard processing are: *BC_ANALYZE:* Calculates and assesses KPIs *and* scorecards. *BC_ASSESS:* Assesses scorecards. *BC_OVRASMT:* Applies manual assessments.

Warning! *Do not* select the As Of Dated Jobstream check box. This is not supported for Scorecard applications. *If you select this option, your results will be incorrect.*

Chapter 7

Monitoring Scorecards and KPIs

Understanding the Scorecard and KPI Monitoring Pages

After you process KPIs and scorecards, you can use the pages that are discussed in this topic to monitor the success of your strategy. These pages provide graphs, buttons, and links that you click to reveal varying levels of detail or to access pages with related information. On some pages, you navigate through the strategy hierarchy to view each component's performance. Other pages enable you to override assessments, enter comments, send emails, and view attachments. These pages are very intuitive, so we don't explain every page in detail. Instead, we summarize the type of information the pages provide, define the common elements they use, review the pages, and describe how to perform the administrative tasks that you can accomplish by using these pages.

Many of these pages have a similar layout, and include some or all of the following elements:

Object	***Description***
Scorecard Control Panel	This collapsible group box enables you to: • Select a page to view. • Specify the business unit, scenario, and time frame to view. • Save a page configuration as a named view. • Select a saved page configuration to view. This group box appears on the following pages: Details by Strategic Thrust, KPI List, Portfolios, Scorecard at a Glance, Strategies by Perspective, Strategy.
Scorecard Information	Information about the current scorecard, including its owners, the calendar used, and the period being viewed.
Component Information	Information about the current component.
Graphs	Various graphs.
Links and buttons	Links to other related pages or to view different chart types. Also buttons to perform tasks such as sending emails or entering comments.
Grids	Detailed fields that are related to the current object. Some pages contain multiple grid areas; each grid is labeled so that you can easily understand the information that is presented.

Charts

You can interact with many of the charts that appear on these pages by moving your mouse pointer over a data point to view its details, such as the x and y values and a description. Also, on the variance chart (an applet chart), you can rotate the chart by clicking an axis and dragging it with your mouse, and move the chart floor by clicking and dragging the floor's surface. On some pages, you select which data to chart by selecting the check box in the Chart column.

For KPI charts, the y-axis scale is controlled by the values in the Y Axis - - Min Value and Y Axis - - Max Value fields on the Dimension Members page.

See Dimension Members Page.

Note: For performance reasons, only KPIs that are less than their target values appear on the 3D variance chart.

Several bar graphs include the following overlay lines:

Overlay Line	***Description***
Last Year Actuals	Shows last year's results, if available.
Trajectory	Extrapolates results into the future, using simple linear regression to compute the data points. This provides a statistically based prediction of the future results.

The linear regression formula that is used to compute the trajectory line (where the equation for a line is y = mx + b) is:

Image: Linear regression formula

Linear regression formula

$$m = \frac{n(\Sigma xy) - (\Sigma x)(\Sigma y)}{n(\Sigma(x^2)) - (\Sigma x)^2}$$

$$b = \bar{y} - m\bar{x} = \frac{\Sigma y}{n} - m\frac{\Sigma x}{n}$$

Printing

To generate an optimal printout of the scorecard viewing pages, you need to set your internet browser to print background colors and images. In Internet Explorer, you can check this setting by selecting Tools, Internet Options, selecting the Advanced tab, then scrolling through the list of settings to view the printing options. Select the Print background colors and images check box, and click OK.

Prerequisites

Before you can monitor scorecards and KPIs, you must:

- Set up a personal profile.

  This profile determines which scorecard is your default scorecard when you sign in, and viewing options for portal pagelets. Profiles are associated with a user ID.

  See Establishing Profiles and Portal Preferences.

- Ensure that the options for viewing charts have been set up properly.

  See Verifying System Settings for Charts.

- Run the Scorecard Assessment process.

  This process resolves the values for KPIs and determines the scorecard assessments.

  See Processing Scorecards.

Establishing Profiles and Portal Preferences

This topic discusses how to:

- Set up a profile.
- Specify portal preferences.

Pages Used to Establish Profiles and Portal Preferences

Page Name	***Definition Name***	***Navigation***	***Usage***
My Profile	BC_OPER_DFLT4	Scorecards, My Profile, My Profile	Establish the scorecard, business unit, and scenario that you initially view when you access the various scorecard pages. Also specify whether you use multiple currencies.
Select Scorecard	BC_OPER_DFLT	Click the Select Scorecard link on the My Profile page.	Select a default scorecard.
Portal Preferences	BC_OPER_DFLT3	Scorecards, My Profile, Portal Preferences	Specify preferences and display options for portal pagelets.
KPI Selection	BC_OPR_PREF_SEQ	Click the Select KPIs link on the Portal Preferences page.	Select the KPIs to view for each portal pagelet. Each pagelet has a specific maximum number of KPIs that are allowed.

My Profile Page

Use the My Profile page (BC_OPER_DFLT4) to establish the scorecard, business unit, and scenario that you initially view when you access the various scorecard pages.

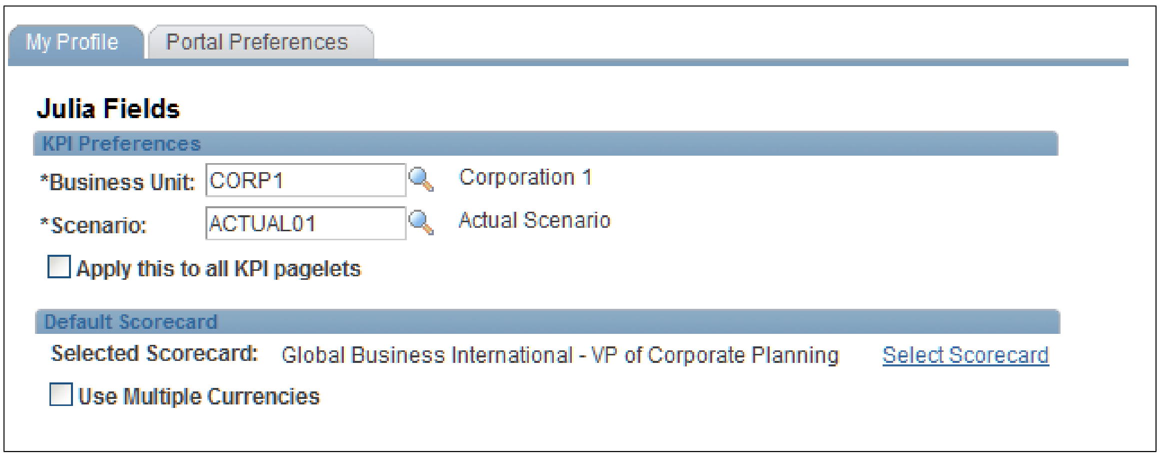
Also specify whether you use multiple currencies.

Navigation

Scorecards, My Profile, My Profile

Image: My Profile page

This example illustrates the fields and controls on the My Profile page. You can find definitions for the fields and controls later on this page.



KPI Preferences

Business Unit and Scenario ID

Select the default business unit and scenario to view on KPI-specific pages.

The system automatically uses the values that are defined on the Portal Preferences page for these fields, if they have been specified, but you can override these values.

Apply this to all KPI pagelets

Select to use the specified scenario and business unit for all pagelets. The business unit and scenario ID on the Portal Preferences page are unavailable for entry when you select this option.

Clear this check box to be able to specify the default business unit and scenario independently for each pagelet on the Portal Preferences page.

Default Scorecard

Selected Scorecard

Displays your current default scorecard.

Select Scorecard	Click to access the Select Scorecard page, where you can view a list of scorecards and select a default scorecard.
Use Multiple Currencies	Select if your implementation includes business with different base currencies. When you select this option, a drop-down list box appears on the KPI List page and the Strategy page, which enables you to change the displayed currency.

Portal Preferences Page

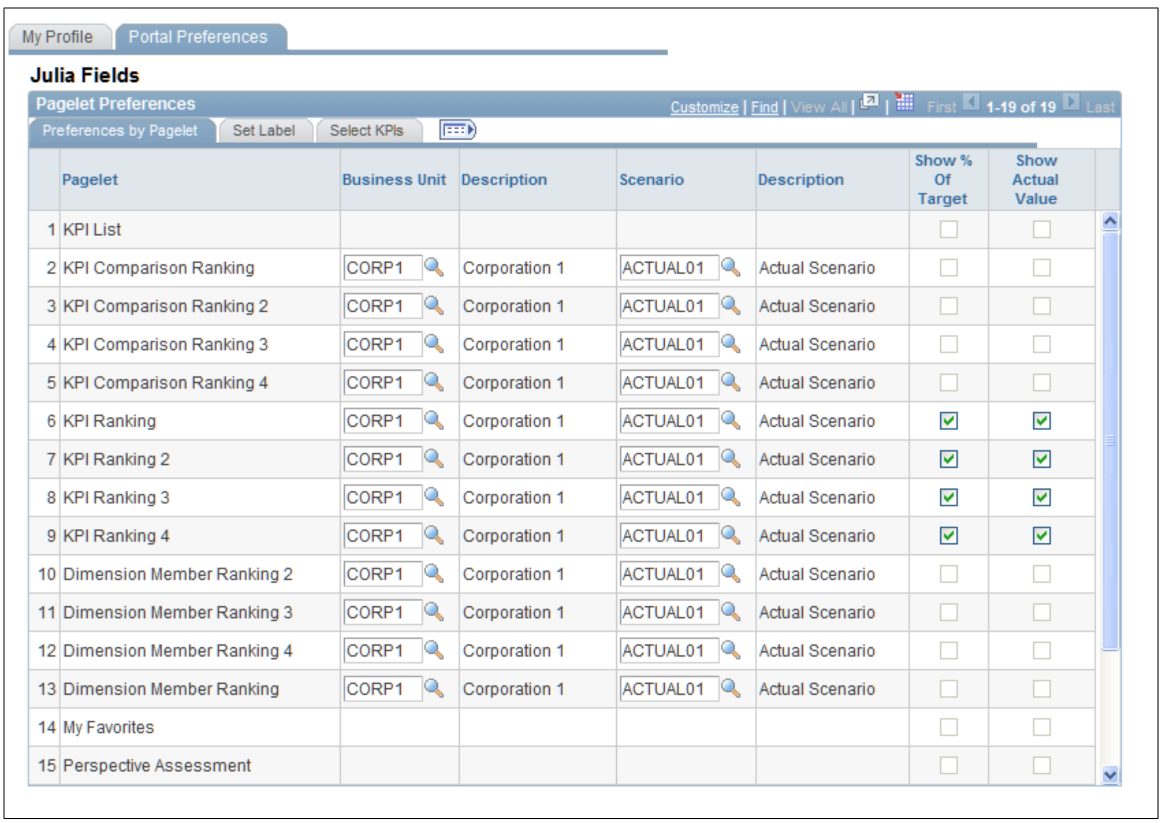
Use the Portal Preferences page (BC_OPER_DFLT3) to specify preferences and display options for portal pagelets.

Navigation

Scorecards, My Profile, Portal Preferences

Image: Portal Preferences page

This example illustrates the fields and controls on the Portal Preferences page. You can find definitions for the fields and controls later on this page.


My Profile | Portal Preferences

Julia Fields

Pagelet Preferences Customize | Find | View All | First 1-19 of 19 Last

Preferences by Pagelet | Set Label | Select KPIs

	Pagelet	Business Unit	Description	Scenario	Description	Show % Of Target	Show Actual Value
1	KPI List					☐	☐
2	KPI Comparison Ranking	CORP1	Corporation 1	ACTUAL01	Actual Scenario	☐	☐
3	KPI Comparison Ranking 2	CORP1	Corporation 1	ACTUAL01	Actual Scenario	☐	☐
4	KPI Comparison Ranking 3	CORP1	Corporation 1	ACTUAL01	Actual Scenario	☐	☐
5	KPI Comparison Ranking 4	CORP1	Corporation 1	ACTUAL01	Actual Scenario	☐	☐
6	KPI Ranking	CORP1	Corporation 1	ACTUAL01	Actual Scenario	☑	☑
7	KPI Ranking 2	CORP1	Corporation 1	ACTUAL01	Actual Scenario	☑	☑
8	KPI Ranking 3	CORP1	Corporation 1	ACTUAL01	Actual Scenario	☑	☑
9	KPI Ranking 4	CORP1	Corporation 1	ACTUAL01	Actual Scenario	☑	☑
10	Dimension Member Ranking 2	CORP1	Corporation 1	ACTUAL01	Actual Scenario	☐	☐
11	Dimension Member Ranking 3	CORP1	Corporation 1	ACTUAL01	Actual Scenario	☐	☐
12	Dimension Member Ranking 4	CORP1	Corporation 1	ACTUAL01	Actual Scenario	☐	☐
13	Dimension Member Ranking	CORP1	Corporation 1	ACTUAL01	Actual Scenario	☐	☐
14	My Favorites					☐	☐
15	Perspective Assessment					☐	☐

The elements on this page control the appearance of the various portal pagelets. You can establish settings only for those pagelets that are associated with applications that you have licensed.

Note: If an option does not apply to a particular pagelet, then that column of the Portal Preferences grid is unavailable for that pagelet row.

Preferences by Pagelet Tab Fields

Business Unit and Scenario

Select which business unit and scenario's data to view on each pagelet.

These fields are unavailable for entry if you select the Apply this to all KPI pagelets check box on the My Profile page, and their values by default are the business unit and scenario that are specified on that page.

Show % of Target

Select to show the value for percent of target (the percentage of the actual value compared to its target value) on the pagelet.

Show ActualValue

Select to show the resolved value for objects on the pagelet.

Set Label Tab Fields

Label

Enter a descriptive label of your choice to display on the pagelet.

Show Assessment

Select to show the assessment.

Show KPI Target

Select to show the target.

Show Trend Indicator

Select to show the trend.

Display Preference

Select which additional options to show on the pagelet. The options that are available depend on the pagelet.

Select KPIs Tab Fields

Sort By

Select the field by which to sort the pagelet's objects. Options are:

Actual Value: Sorts the objects by their resolved value.

% of Target: Sorts the objects by their percent of target value.

Sort Order

Select whether to sort the objects in ascending or descending order.

Request Status

Indicate which project requests the system displays by selecting the status value to view. This option is available only if you are implementing PeopleSoft Project Portfolio Management.

Select KPI

Click to access the KPI Selection page, where you can select which KPI to view for that pagelet.

Verifying System Settings for Charts

This topic provides an overview of the requirements for charts and discusses how to set up the system for variance charts.

Page Used to Verify System Settings for Charts

Page Name	***Definition Name***	***Navigation***	***Usage***
Installation Options - Web Services	INSTALLATION_PF3	EPM Foundation, EPM Setup, Installation Analysis & Options, Installation Options, Web Services.	Set chart-related web service options.

Understanding Requirements for Charts

Most of the charts on the pages described in this topic use the PeopleTools charting utility and require no additional setup beyond installing and configuring PeopleTools. However, to use the variance chart, you must install the EPM charting tool when you install the application, and select several options to enable the system to generate the chart.

See the *PeopleSoft EPM Installation Guide* on the PeopleSoft My Oracle Support website.

Installation Options - Web Services Page

Use the Installation Options - Web Services page (INSTALLATION_PF3) to set chart-related web service options.

Navigation

EPM Foundation, EPM Setup, Installation Analysis & Options, Installation Options, Web Services.

Applets	Select to enable the variance chart. Applets download code to the client workstation to generate the chart.
Chart Server	Select to enable you to use the basic charting features.

Related Links

"Web Services Page *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*"

Viewing Scorecard Results

This topic discusses how to:

- Review scorecard performance.
- View strategy results.

- View scorecard KPI results.
- Review scorecard portfolios.
- Review cause and effect relationships.
- Review performance of strategic initiatives.

Note: On these pages, you can view only the KPI dimension members and scorecards to which you have been granted security.

Pages Used to View Scorecard Results

Page Name	*Definition Name*	*Navigation*	*Usage*
Scorecard at a Glance	BC_HOMEPAGE	Scorecards, View Scorecard Results, Scorecard at a Glance	View a summary of scorecard results.
Strategy	BC_STRATEGY_TREE	Scorecards, View Scorecard Results, Strategy	View a scorecard's strategy components and their assessments hierarchically, and navigate through each level. At the most detailed level, you can view the scorecard's KPIs.
Strategy Detail	BCIC_STRATDET_PNL	Click a strategy component Description field on various pages.	View historical assessment results for a strategy component by period.
Strategy Detail - Strategy Map	BC_CAUSEEFF_IMG	Select the Strategy Map tab on the Strategy Detail page.	View the assigned strategy map image for a strategy component.
Component Cause & Effect	BC_VW_CAUSE_EFFECT	Click the Cause and Effect link on the Strategy Detail page.	View the cause and effect relationships for the current strategy component. This page shows other components that affect the current strategy component, or those that it affects.
Strategies by Perspective	BCIC_VW_BY_PERS	Scorecards, View Scorecard Results, Strategies by Perspective	View strategy components categorized by their perspective.
Portfolios	BC_PORT_SRCHPNL	Scorecards, View Scorecard Results, Portfolios	View a list of defined portfolios and select one to view its details.
Portfolio Scorecard Analysis	BC_VIEW_PORTFOLIO	From the Portfolios page, click the Scorecards link for a portfolio.	View the scorecards within a selected portfolio. Click an assessment to transfer to that scorecard.

Page Name	***Definition Name***	***Navigation***	***Usage***
Strategic Thrusts	BC_SRCHDETAIL	Scorecards, View Scorecard Results, Details by Strategic Thrust	View assessment results for strategic thrusts.
Strategic Thrusts Detail	BC_VIEW_DETAIL	On the Strategic Thrusts page, click a strategy component description.	View assessments for each object that is associated with a strategic thrust, grouped by the critical success factor with which it belongs.
KPI List	BCIC_KPILIST_PNL	Scorecards, View Scorecard Results, KPI List, KPI List	View a list of the scorecard's KPIs. View a bar, trend, or variance chart of KPIs.
KPI List - Related KPIs	BCIC_KPIREL_PNL	Scorecards, View Scorecard Results, KPI List, Related KPIs	View KPIs that are related to the current scorecard.
Initiative	BC_VW_KPI_INITS	From the KPI Detail page or Strategy Detail page, click the Initiative link.	View strategic initiatives that are associated with a strategy component or KPI.

Related Links

Viewing KPI Results

Common Elements Used in This Topic

Page

Displays the name of the current page. Select a different page name, and then click Apply to access a new page. Options are: *Details by Strategic Thrust, KPI List, Portfolios, Scorecard at a Glance, Strategies by Perspective, Strategy.*

Business Unit

Select the business unit for which to review results. The initial value for this field is the business unit that you specified as your default business unit by using the My Profile page.

Scenario

Select the scenario for which to review results. The initial value for this field is the scenario that you specified as your default scenario by using the My Profile page.

Scorecard

Select the scorecard for which to review results. The initial value for this field is the scorecard that you specified as your default scorecard by using the My Profile page.

Time

Specify the timeframe for which to review results. The initial value for this field is the timeframe that you specified as your default timeframe by using the My Profile page. Options are:

Current: Select to review results for the most recent period for which results have been generated.

Choose: Select to specify the period to view. When you select this option the Year and Period fields are activated, and you must select the year and period to view.

Currency

Select the currency in which to view monetary amounts. The system converts other currencies to the selected currency using the established conversion rates. This field appears only for the KPI List and Strategy pages.

Conversion tables and currency codes are established in PeopleSoft EPM.

See "Setting Up EPM Infrastructure, Business Rules, and Security" in the *Enterprise Performance Management Fundamentals* product documentation.

Apply

Click to apply any changed field values, and reload the page using the new parameters. For example, if you want to view a different page, after you select a new page, you must click Apply to access the page. Similarly, if you select a new business unit, you must click Apply to see the values for that business unit.

Restore to Defaults

Click to restore the field values for the business unit, scenario, and scorecard to the default values that are established on the My Profile page.

Set as Default

Click to save the current field values for business unit, scenario, and scorecard as the default values. This also updates the corresponding values on the My Profile page.

Save View

Click to save the current field values to a named view.

This enables you to later recall that same page configuration by selecting the name in the Go to View field and clicking Apply.

With Name

Enter the name by which to save the page configuration. This field is used when you click the Save View button.

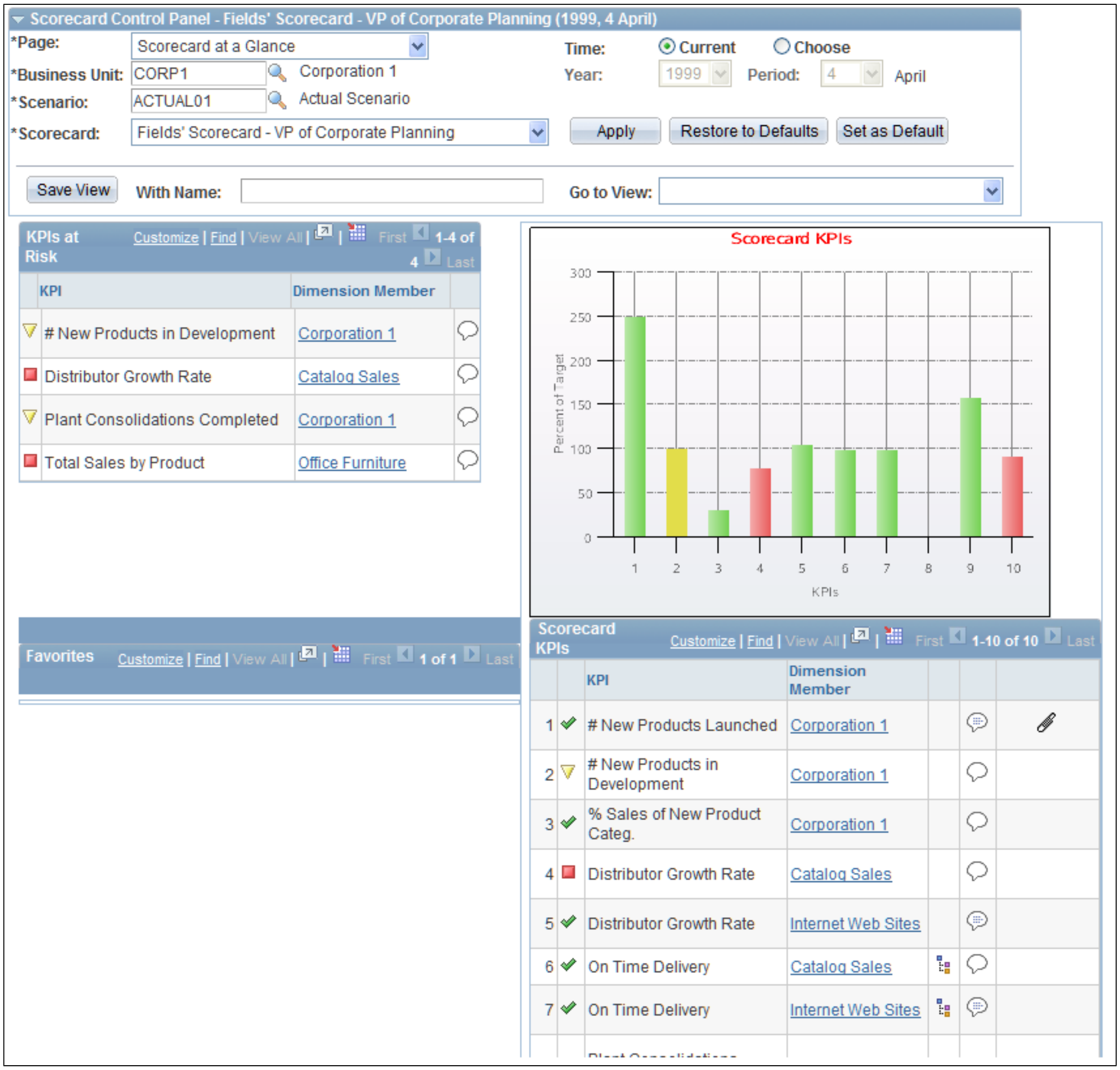
Go to View

Select a named view to access.

Scorecard at a Glance Page

Image: Scorecard at a Glance page

This example illustrates the fields and controls on the Scorecard at a Glance page. You can find definitions for the fields and controls later on this page.



Scorecard Control Panel

These fields are discussed in the Common Elements topic.

See Common Elements Used in This Topic.

KPIs at Risk

This grid lists KPIs that received assessments that aren't meeting acceptable levels of performance. You designate the assessments that are considered to be exceptions by using the Treat as Risks grid on the Scorecard page.

See Common Elements Used in This Topic.

Favorites

The Favorites grid shows the assessments for the KPIs or strategy components that you've chosen as favorites. This grid includes KPIs or strategy components from all scorecards, not just the scorecard that is currently selected.

Scorecard KPIs

This group box includes a graph that shows the results of the KPIs for this scorecard and a grid that shows the assessments for the current scorecard's KPIs.

Strategy Page

Use the Strategy page (BC_STRATEGY_TREE) to view a scorecard's strategy components and their assessments hierarchically, and navigate through each level.

At the most detailed level, you can view the scorecard's KPIs.

Navigation

Scorecards, View Scorecard Results, Strategy

Image: Strategy page

This example illustrates the fields and controls on the Strategy page. You can find definitions for the fields and controls later on this page.

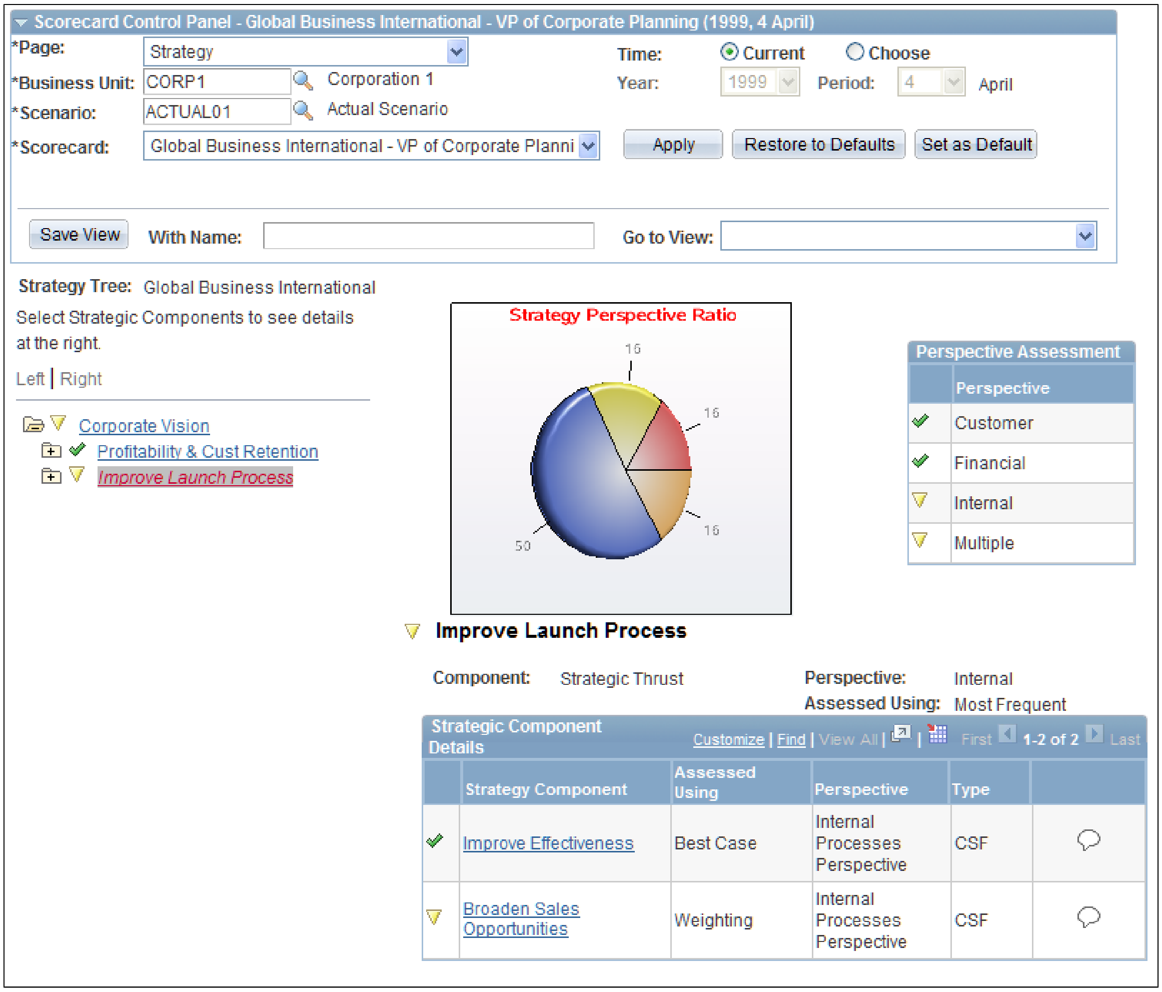
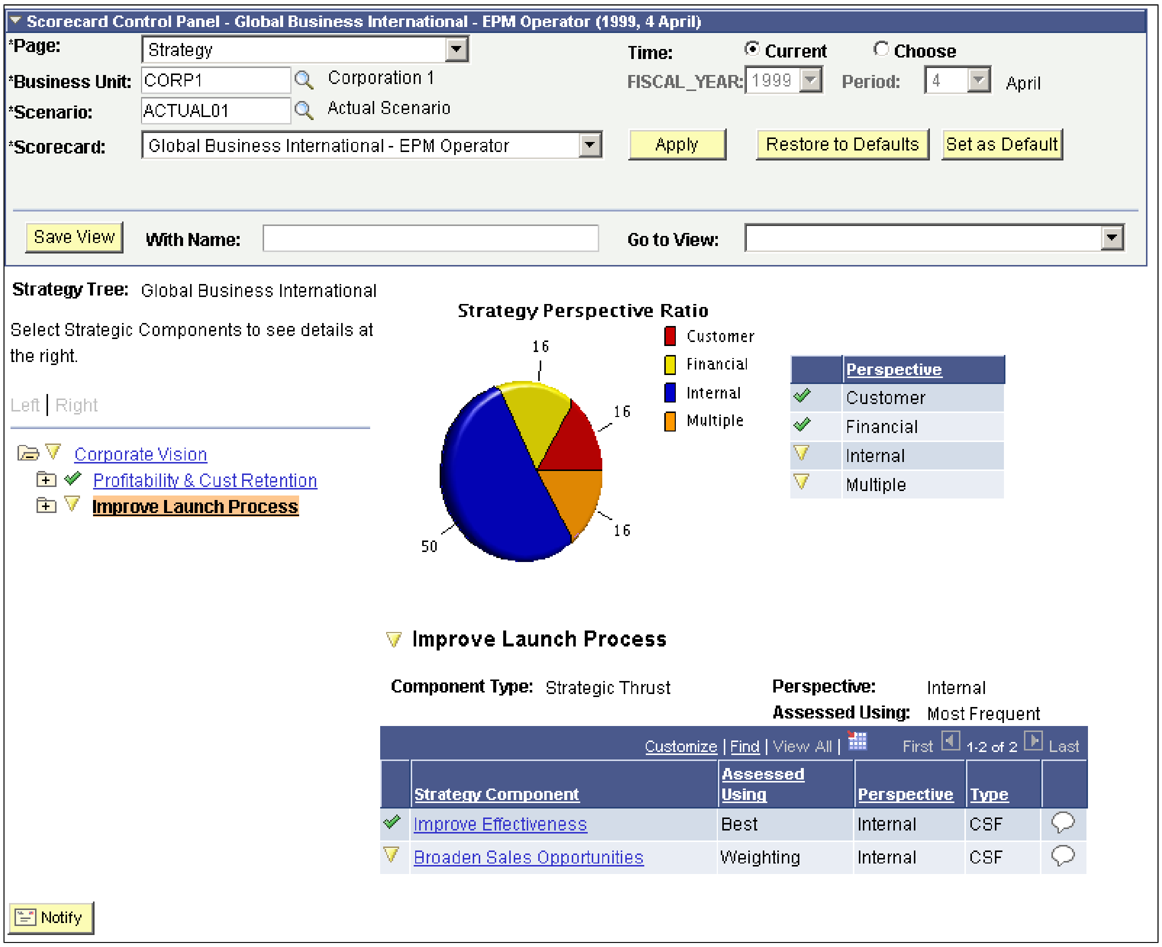


Image: Strategy page

This example illustrates the fields and controls on the Strategy page. You can find definitions for the fields and controls later on this page.



This page shows the strategy tree hierarchy on the left, with assessment information for the components that are subordinate to the currently selected component (the active strategy component) in the grid area below the graph. When you initially view this page, the vision-level component is active.

You can interact with this page by:

- Selecting different components in the tree to review assessment information for that level of the strategy hierarchy in the grid area.
- Expanding or collapsing branches of the tree by clicking the tree node folders.

  You can expand the tree to the KPI level (KPIs appear with a key symbol). An *X* image appears in the tree for any strategy components that are not assessed. This could occur if a branch is made up entirely of monitor-only KPIs, for example.
- Clicking a component's description (or a KPI's dimension) within the grid area to access the related detail page, where you can review more information.
- Reviewing the assessment for each perspective .
- Changing the results that you are viewing by modifying the field values in the scorecard control panel.

The graph that appears varies depending on the level of the strategy tree that you select. At the highest level (the vision level), a pie chart shows the percentage of components within each perspective, and the grid breaks down the assessments by perspective category. At lower levels, a bar chart shows the percentage of target achieved for the dimension members within that level.

KPI List Page

Use the KPI List page (BCIC_KPILIST_PNL) to view a list of the scorecard's KPIs.

View a bar, trend, or variance chart of KPIs.

Navigation

Scorecards, View Scorecard Results, KPI List, KPI List

Image: KPI List page

This example illustrates the fields and controls on the KPI List page. You can find definitions for the fields and controls later on this page.

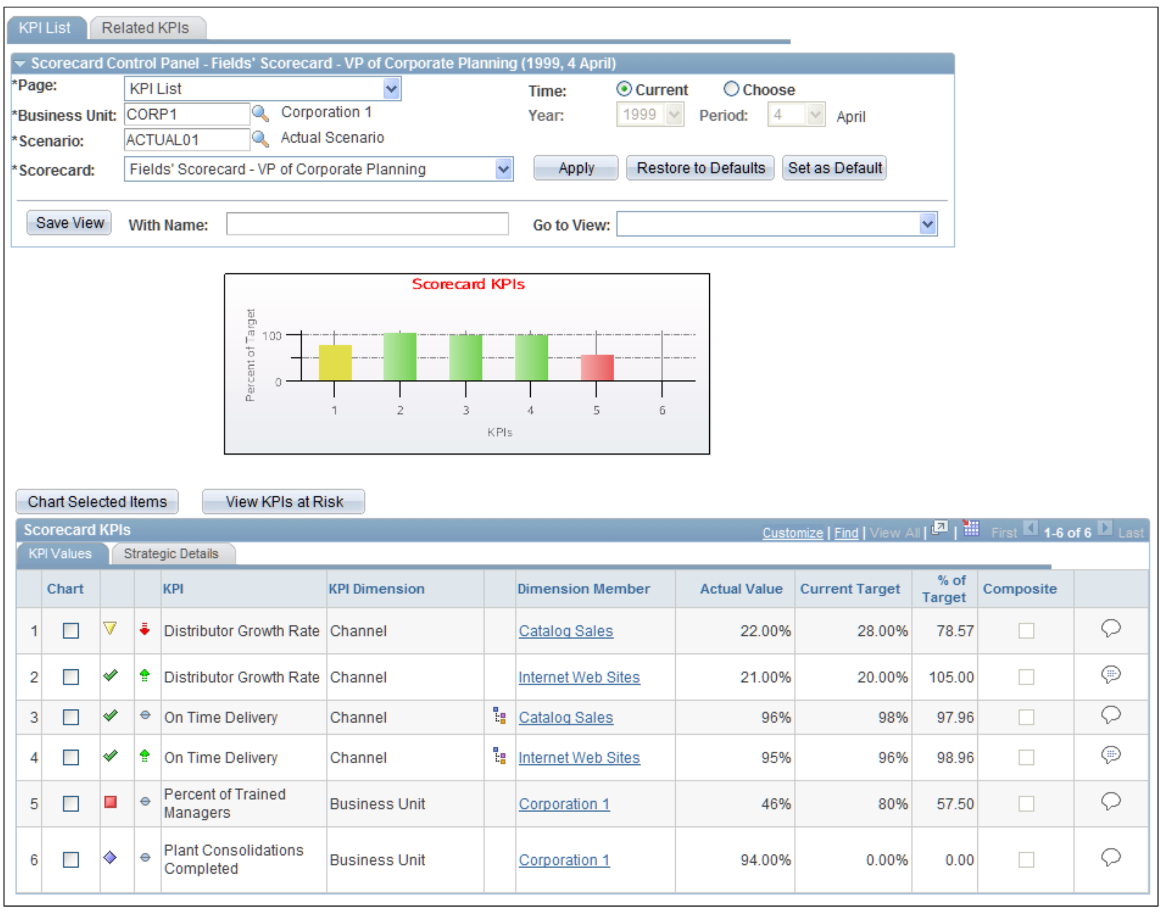


	Chart			KPI	KPI Dimension		Dimension Member	Actual Value	Current Target	% of Target	Composite	
1				Distributor Growth Rate	Channel		Catalog Sales	22.00%	28.00%	78.57		
2				Distributor Growth Rate	Channel		Internet Web Sites	21.00%	20.00%	105.00		
3				On Time Delivery	Channel		Catalog Sales	96%	98%	97.96		
4				On Time Delivery	Channel		Internet Web Sites	95%	96%	98.96		
5				Percent of Trained Managers	Business Unit		Corporation 1	46%	80%	57.50		
6				Plant Consolidations Completed	Business Unit		Corporation 1	94.00%	0.00%	0.00		

Scorecard Control Panel

These fields are discussed in the Common Elements topic.

See Common Elements Used in This Topic.

Scorecard KPIs

A graph and grid of the scorecard results appears in this section. When you first access this page, all of the scorecard KPIs that you have been granted security to access are included in the graph and appear within the grid area. Use the following buttons to change the data that appears in the graph and grid.

View KPIs at Risk
Click to view only KPIs with assessments that are considered exceptions.

View All KPIs
Click to view all scorecard KPIs.

Chart Selected Items
Click to generate a chart that includes only the KPIs in the grid that have the Chart check box selected.

Variance Chart
Click to view a variance chart of the KPIs.

Bar Chart
Click to view a bar chart of the KPIs.

The following fields appear as columns in the grid:

Chart
Select to include the KPI in the chart that is generated when you click Chart Selected Items.

Assessment Symbol
Displays the current assessment results for the KPI.

Trend Indicator
Displays the current trend for the KPI.

KPI
Lists the description of the KPI.

Dimension
Lists the KPI dimension.

Hierarchical Dimension ( )
If the KPI is a hierarchical KPI, the View Hierarchical Dimension button appears; otherwise, this field is blank. Click the View Hierarchical Dimension button to access the Hierarchical KPI page, where you can view the results of the KPIs within the hierarchy.

Dimension Member
Displays the name of the dimension member for the KPI. Click to access the KPI Detail page for the dimension member, where you can review its assessment history.

Actual Value
Displays the resolved value for the KPI dimension member for the specified fiscal year and period.

Current Target
Displays the resolved value for the KPI dimension member for the specified fiscal year and period.

% of Target (Percent of Target)
Displays the percentage of the actual value compared to its target value attained by the KPI dimension member for the specified fiscal year and period.

Composite
If selected, indicates that the KPI is a composite KPI.

Add/View Comments ( ) or ( )
Click to access the Comments page, where you can add comments or review the history of entered comments. If no

comments currently exist, the button that appears does not have lines in it.

View Attachment ( ) Click to access the Attachments page, where you can view file attachments that are associated with the KPI.

Perspective Displays the perspective within which the KPI is categorized.

Visibility Indicator Displays the type of indicator that is associated with the KPI.

Trend Indicator Displays the current performance trend for the KPI.

KPI Usage Displays the usage type that is associated with the KPI.

Business Function Displays the business task type that is associated with the KPI.

Desired Direction Displays whether the desired results should increase or decrease in value.

Used If selected, indicates that the KPI dimension member was used to determine assessment results for the strategy components with which it is associated. If not selected, then this KPI dimension member's results are not considered when the system determines assessments for strategy components.

Related Links

KPI Definition Page

Portfolio Scorecard Analysis Page

Use the Portfolio Scorecard Analysis page (BC_VIEW_PORTFOLIO) to view the scorecards within a selected portfolio.

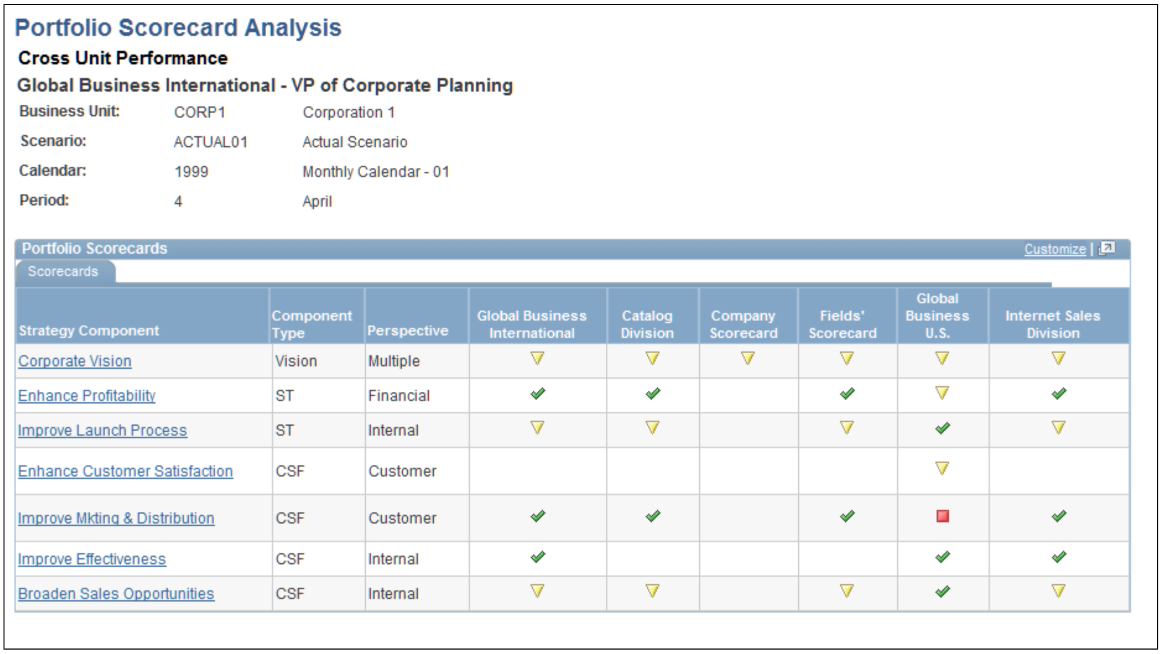
Click an assessment to transfer to that scorecard.

Navigation

From the Portfolios page, click the Scorecards link for a portfolio.

Image: Portfolio Scorecard Analysis page

This example illustrates the fields and controls on the Portfolio Scorecard Analysis page. You can find definitions for the fields and controls later on this page.



This page enables you to compare assessments across multiple scorecards at one time. This is especially valuable when you want to compare performance among departments, business units, or individuals, for example.

<assessment image>

Click an assessment image at the intersection of a scorecard column and component row to access the View Strategy page for the component that is associated with that row, and change the active scorecard to the scorecard that is listed in that column.

Strategy Component

Click a strategy component description to view the strategy details for that component in the active scorecard.

Related Links

Understanding Portfolios

Component Cause & Effect Page

Use the Component Cause & Effect page (BC_VW_CAUSE_EFFECT) to view the cause and effect relationships for the current strategy component.

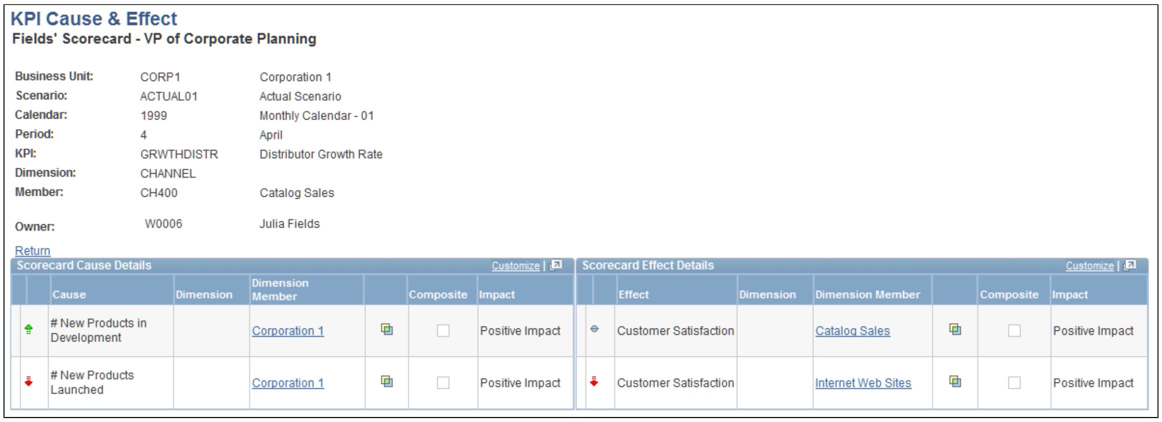
This page shows other components that affect the current strategy component, or those that it affects.

Navigation

Click the Cause and Effect link on the Strategy Detail page or click the Cause and Effect link on the KPI Detail page

Image: KPI Cause and Effect page

This example illustrates the fields and controls on the KPI Cause and Effect page. You can find definitions for the fields and controls later on this page.



These pages show the components or KPI dimension members that the current component or KPI dimension member has an impact upon (those listed in the Cause column), or those that impact it (those listed in the Effect column).

This information is derived from the KPI Cause Effect page (or Component Cause Effect page) in the following manner:

- Items listed in the Cause column are listed in the Cause Effect page for the current KPI (or component).
- Items listed in the Effect column will contain the current KPI (or component) in their Cause Effect page.

	Click to view the Cause and Effect page from the perspective of the KPI dimension member (or component) in the current row.
<dimension member description> or <strategy component description>	Displays the descriptions for the KPI dimension members or the strategy components. Click to access the KPI Detail page (or Strategy Detail page).

Initiative Page

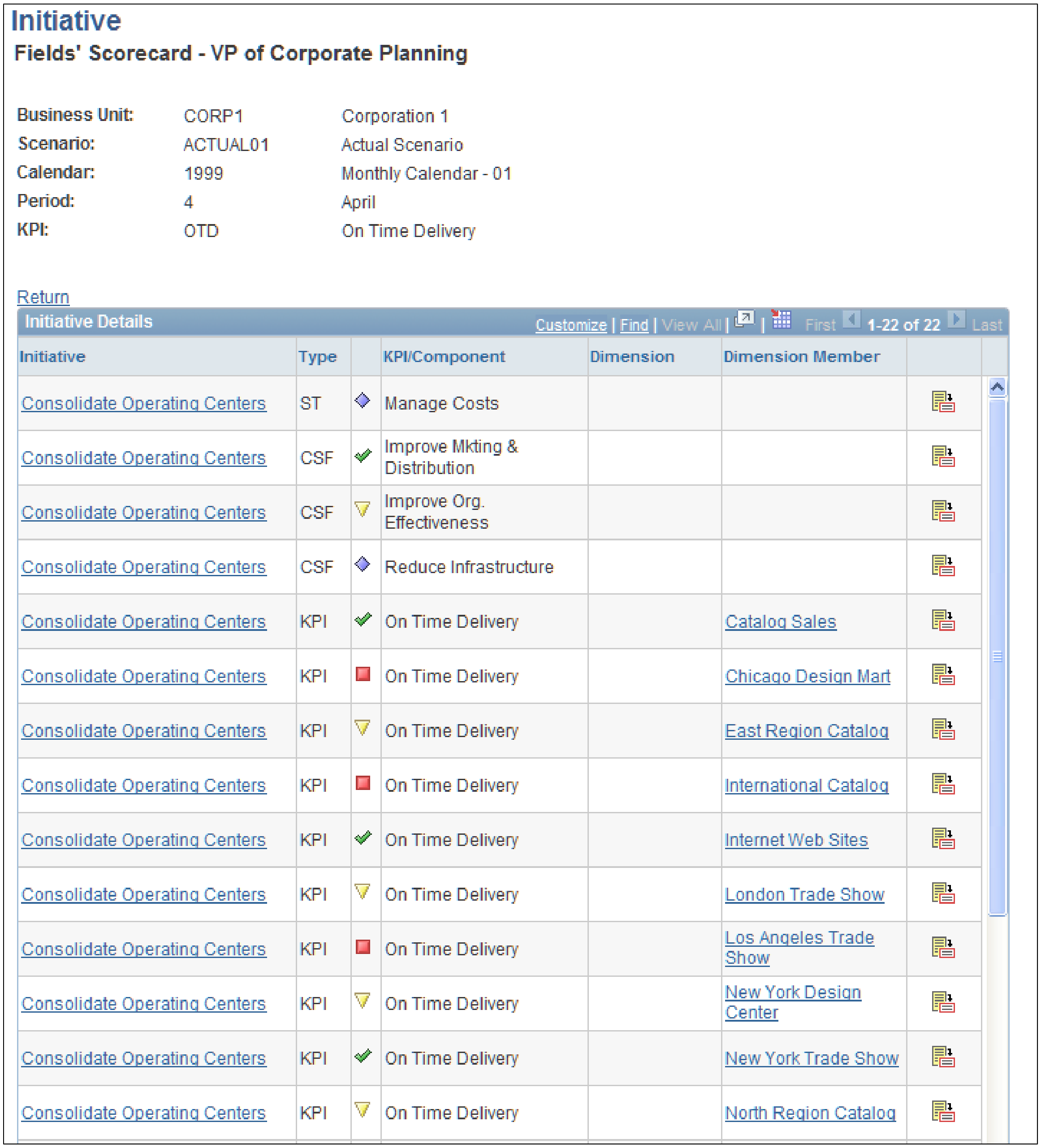
Use the Initiative page (BC_VW_KPI_INITS) to view strategic initiatives that are associated with a strategy component or KPI.

Navigation

From the KPI Detail page or Strategy Detail page, click the Initiative link.

Image: Initiative page

This example illustrates the fields and controls on the Initiative page. You can find definitions for the fields and controls later on this page.



Initiative

Fields' Scorecard - VP of Corporate Planning

Business Unit:	CORP1	Corporation 1
Scenario:	ACTUAL01	Actual Scenario
Calendar:	1999	Monthly Calendar - 01
Period:	4	April
KPI:	OTD	On Time Delivery

Return

Initiative Details Customize | Find | View All | First 1-22 of 22 Last

Initiative	Type		KPI/Component	Dimension	Dimension Member	
Consolidate Operating Centers	ST		Manage Costs			
Consolidate Operating Centers	CSF		Improve Mkting & Distribution			
Consolidate Operating Centers	CSF		Improve Org. Effectiveness			
Consolidate Operating Centers	CSF		Reduce Infrastructure			
Consolidate Operating Centers	KPI		On Time Delivery		Catalog Sales	
Consolidate Operating Centers	KPI		On Time Delivery		Chicago Design Mart	
Consolidate Operating Centers	KPI		On Time Delivery		East Region Catalog	
Consolidate Operating Centers	KPI		On Time Delivery		International Catalog	
Consolidate Operating Centers	KPI		On Time Delivery		Internet Web Sites	
Consolidate Operating Centers	KPI		On Time Delivery		London Trade Show	
Consolidate Operating Centers	KPI		On Time Delivery		Los Angeles Trade Show	
Consolidate Operating Centers	KPI		On Time Delivery		New York Design Center	
Consolidate Operating Centers	KPI		On Time Delivery		New York Trade Show	
Consolidate Operating Centers	KPI		On Time Delivery		North Region Catalog	

The grid lists the components and KPI dimension members that are part of the strategic initiative, and their assessment results.

Initiative Click to access the page where you can view the initiative definition.

Type

Indicates the type of component. Values are *ST* (strategic thrust), *CSF* (critical success factor),

Dimension Member

Click a dimension member to view its results on the KPI Detail page.

Click to access the Maintain Dimension page, where you can view details of the projects, if any, that are associated with the strategy initiative. This appears only if an associated project exists.

Viewing KPI Results

The pages discussed in this topic enable you to review KPIs when they are not associated with a scorecard. This topic discusses how to:

- View KPIs that meet specific criteria.
- View KPI details.
- Compare KPIs graphically.
- Review your own KPIs.
- Review KPI portfolios.
- Analyze KPIs and composite KPIs.
- Change weighting of composite KPIs.
- Use a KPI tree for KPI analysis.
- Review hierarchical KPIs.

Pages Used to View KPI Results

Page Name	***Definition Name***	***Navigation***	***Usage***
KPI Filter Search	BC_KPI_OBJ_FILTER	Key Performance Indicators, View KPI Results, Filtered List	View KPIs that meet specified criteria.
KPI Filter List	BC_KPI_OBJ_LIST	Click Get KPIs on the KPI Filter Search page.	View results for the KPIs that meet the criteria that is specified on the KPI Filter Search page.
KPI Filter Criteria	BC_KPI_OBJ_SRCH	Click either Save Filter or Delete filter on the KPI Filter Search page.	Save KPI search criteria to a specified name or delete a named search.

Page Name	***Definition Name***	***Navigation***	***Usage***
Search for Single KPI, Single Dimension Member	KP_QUERY_SEARCH	Key Performance Indicators, View KPI Results, Single KPI, Single Dim Member	Enter criteria to view results of a single KPI dimension member over multiple time periods. Results are displayed using the KPI Detail page.
KPI Detail	BCIC_KPIDETAI3_PNL	Click a KPI dimension member description from various pages, such as the KPI List page.	View assessment details for a KPI for current, cumulative, and prior year time frames.
KPI Detail - Additional Detail	BC_KPIDETAIL_3	On the KPI Detail page, select the Additional Detail tab.	View target rules, notes, and other KPI-related fields.
KPI Detail - Strategy Map	BC_CAUSE_EFF_IMG	On the KPI Detail page, select the KPI Strategy Map tab.	View the assigned strategy map image for a KPI. This page is available only if an associated strategy map exists.
Select KPIs for Chart	BC_PORT_SELECT_KPI	On the Portfolio KPI Analysis page, click Select New KPIs for Chart.	Select different KPIs to chart on the Portfolio KPI Analysis page.
Search for My KPIs	KP_KPILIST_FILTER	Key Performance Indicators, View KPI Results, My KPIs	Enter criteria for viewing KPIs for which you have been identified as either the owner or associate owner.
My KPIs	KP_KPILIST_OWNER	From the Search for My KPIs page, click Search.	Review the KPIs that you have been assigned to as either the owner or associate owner for a specified business unit, scenario, fiscal year, and accounting period.
Portfolios	BC_PORT_SRCHPNL	Scorecards, View Scorecard Results, Portfolios	View a list of defined portfolios and select one to view its details.
Portfolio KPI Analysis	BC_PORT_ANALYSIS	From the Portfolios page, click the KPIs link for a portfolio.	View the KPIs within a selected portfolio.
Portfolio KPI Analysis - Select New KPI Search Criteria	BC_PORTKPI_FILTER	On the Portfolio KPI Analysis page, click Switch KPI Period.	Specify the business unit, scenario, year, and period to evaluate when viewing the Portfolio KPI Analysis page
KPI Cause and Effect	BC_VW_KPI_CS_EFF	On the KPI Detail page, click Cause and Effect.	View the cause and effect relationships for the current KPI. This page shows other KPI dimension members that affect the current KPI, or those that are affected by the current KPI.

Page Name	***Definition Name***	***Navigation***	***Usage***
KPI Compare Selection List	BC_KPI_SELECT_LIST	From the KPI Detail page, click the Compare KPIs link.	Select KPIs to compare graphically.
KPI Compare	BC_KPI_COMP_CHARTS	From the KPI Compare Selection List page, click the Generate Charts button.	View a graphical comparison of several KPIs.
KPI Analysis - Search	BC_PE_CKPI_ANLY_C1	• Scorecards, View Scorecard Results, KPI Analysis • On the KPI Analysis page, click Search.	Specify criteria for KPI analysis.
KPI Analysis	BC_PE_CKPI_ANLY_1	On the KPI Analysis - Search page, click Search.	Analyze KPIs and composite KPIs.
KPI Analysis - Weighting	BC_PE_CKPI_ANLY_2	Click the Weighting link on the KPI Analysis page. This link appears for composite KPIs only.	Change the weighting for KPIs that make up a composite KPI to display new results on the KPI Analysis page. These results are not saved.
Analyze	BC_KP_PATH	On the KPI Detail page, click Analyze.	Select a KPI to view on the Analyze - KPI Tree page.
Analyze - KPI Tree	KP_ANALYZE_TREE	On the Analyze page, click a tree description in the KPI Analysis Path grid.	Navigate through the KPI analysis tree that is associated with a KPI.
Hierarchical KPI Search	KP_VIEW_NODE_KPI	Key Performance Indicators, View KPI Results, Single KPI, Hierarchical Dim	Enter criteria for which hierarchical KPIs to view.
Hierarchical KPI	KP_VIEW_NODE_KPI	• Click the View Hierarchy button on various pages.. • Key Performance Indicators, View KPI Results, Single KPI, Hierarchical Dim	View assessment results for hierarchical KPIs by navigating through the KPI tree.

Related Links

Component Cause & Effect Page
KPI List Page

KPI Filter Search Page

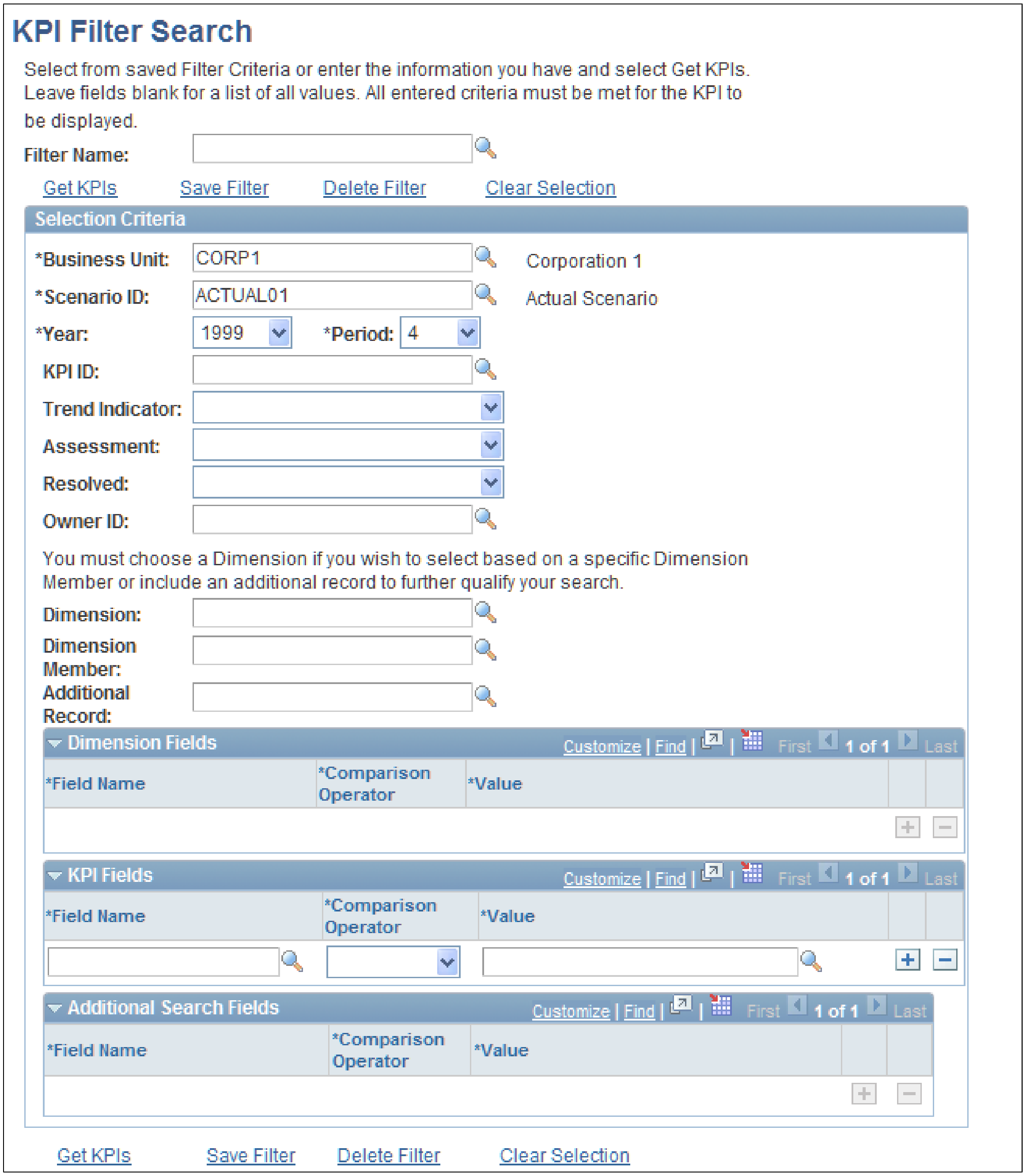
Use the KPI Filter Search page (BC_KPI_OBJ_FILTER) to view KPIs that meet specified criteria.

Navigation

Key Performance Indicators, View KPI Results, Filtered List

Image: KPI Filter Search page

This example illustrates the fields and controls on the KPI Filter Search page. You can find definitions for the fields and controls later on this page.



This page enables you to specify search criteria by which to view KPIs, save search criteria to a filter name, and retrieve a saved filter.

Actions

Filter Name	Select a filter name, then click Get KPIs to use a previously saved filter.
Get KPIs	Click to access the KPI Filter List page and view the KPIs that meet the search criteria.
Save Filter	Click to save the current search criteria to a named filter. When you click this button, you access the KPI Filter Criteria page, where you can enter a filter name and description and save the filter.
Delete Filter	Click to access the KPI Filter Criteria page, where you can delete a saved filter.
Clear Selection	Click to clear all search criteria field values.

Selection Criteria

Business Unit, Scenario ID, Year, and Period	Specify the business unit, scenario, fiscal year and period for which to view KPIs. These fields are required to view a filtered list of KPIs. When you initially access this page, the values for these fields are the values that you specified in the My Profile page.

The remaining selection criteria fields are optional, and enable you to further limit which KPIs you view.

Selection Criteria - Dimension Fields

Use this grid to specify a dimension related field by which to further qualify your search. Select a dimension field, comparison operator and value. To use this option, you must first specify a value for the Dimension field.

Selection Criteria - KPI Fields

Use this grid to specify a KPI related field by which to further qualify your search. Select a KPI field, comparison operator, and value. To use this option, you must first specify a value for the Dimension field.

Selection Criteria - Additional Search Fields

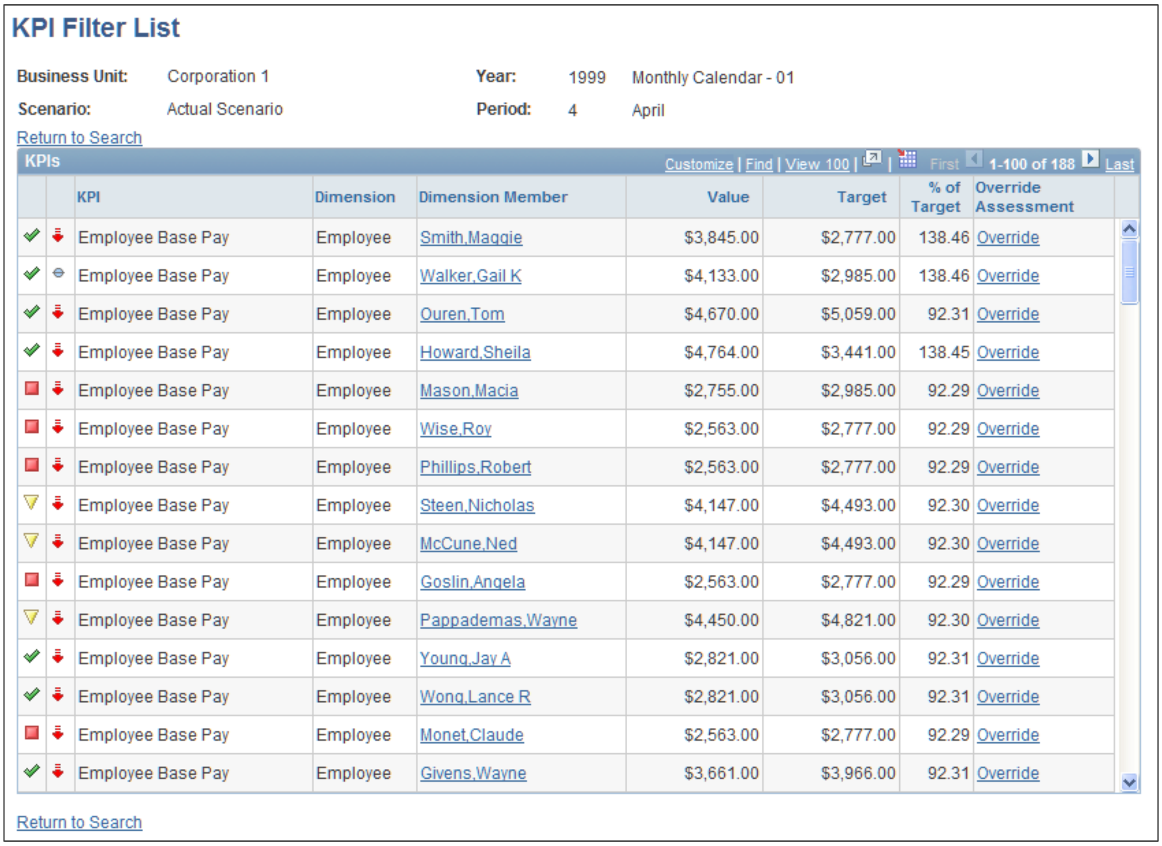
Use this grid to specify an additional field by which to further qualify your search. Select a field, comparison operator, and value. To use this option, you must first specify a value for the Dimension field.

Viewing Results

Click Get KPIs to view the KPIs that match your criteria, and access the KPI Filter List page.

Image: KPI Filter List page

This example illustrates the fields and controls on the KPI Filter List page. You can find definitions for the fields and controls later on this page.


KPI Filter List

Business Unit: Corporation 1 Year: 1999 Monthly Calendar - 01

Scenario: Actual Scenario Period: 4 April

Return to Search

KPIs Customize | Find | View 100 | First 1-100 of 188 Last

		KPI	Dimension	Dimension Member	Value	Target	% of Target	Override Assessment
		Employee Base Pay	Employee	Smith,Maggie	$3,845.00	$2,777.00	138.46	Override
		Employee Base Pay	Employee	Walker,Gail K	$4,133.00	$2,985.00	138.46	Override
		Employee Base Pay	Employee	Ouren,Tom	$4,670.00	$5,059.00	92.31	Override
		Employee Base Pay	Employee	Howard,Sheila	$4,764.00	$3,441.00	138.45	Override
		Employee Base Pay	Employee	Mason,Macia	$2,755.00	$2,985.00	92.29	Override
		Employee Base Pay	Employee	Wise,Roy	$2,563.00	$2,777.00	92.29	Override
		Employee Base Pay	Employee	Phillips,Robert	$2,563.00	$2,777.00	92.29	Override
		Employee Base Pay	Employee	Steen,Nicholas	$4,147.00	$4,493.00	92.30	Override
		Employee Base Pay	Employee	McCune,Ned	$4,147.00	$4,493.00	92.30	Override
		Employee Base Pay	Employee	Goslin,Angela	$2,563.00	$2,777.00	92.29	Override
		Employee Base Pay	Employee	Pappademas,Wayne	$4,450.00	$4,821.00	92.30	Override
		Employee Base Pay	Employee	Young,Jay A	$2,821.00	$3,056.00	92.31	Override
		Employee Base Pay	Employee	Wong,Lance R	$2,821.00	$3,056.00	92.31	Override
		Employee Base Pay	Employee	Monet,Claude	$2,563.00	$2,777.00	92.29	Override
		Employee Base Pay	Employee	Givens,Wayne	$3,661.00	$3,966.00	92.31	Override

Return to Search

Dimension Member Click a dimension member description to access the KPI Detail page, where you can review the results for that KPI dimension member.

Override Click to access the Manual Assessment page, where you can override the assessment results.

KPI Detail Page

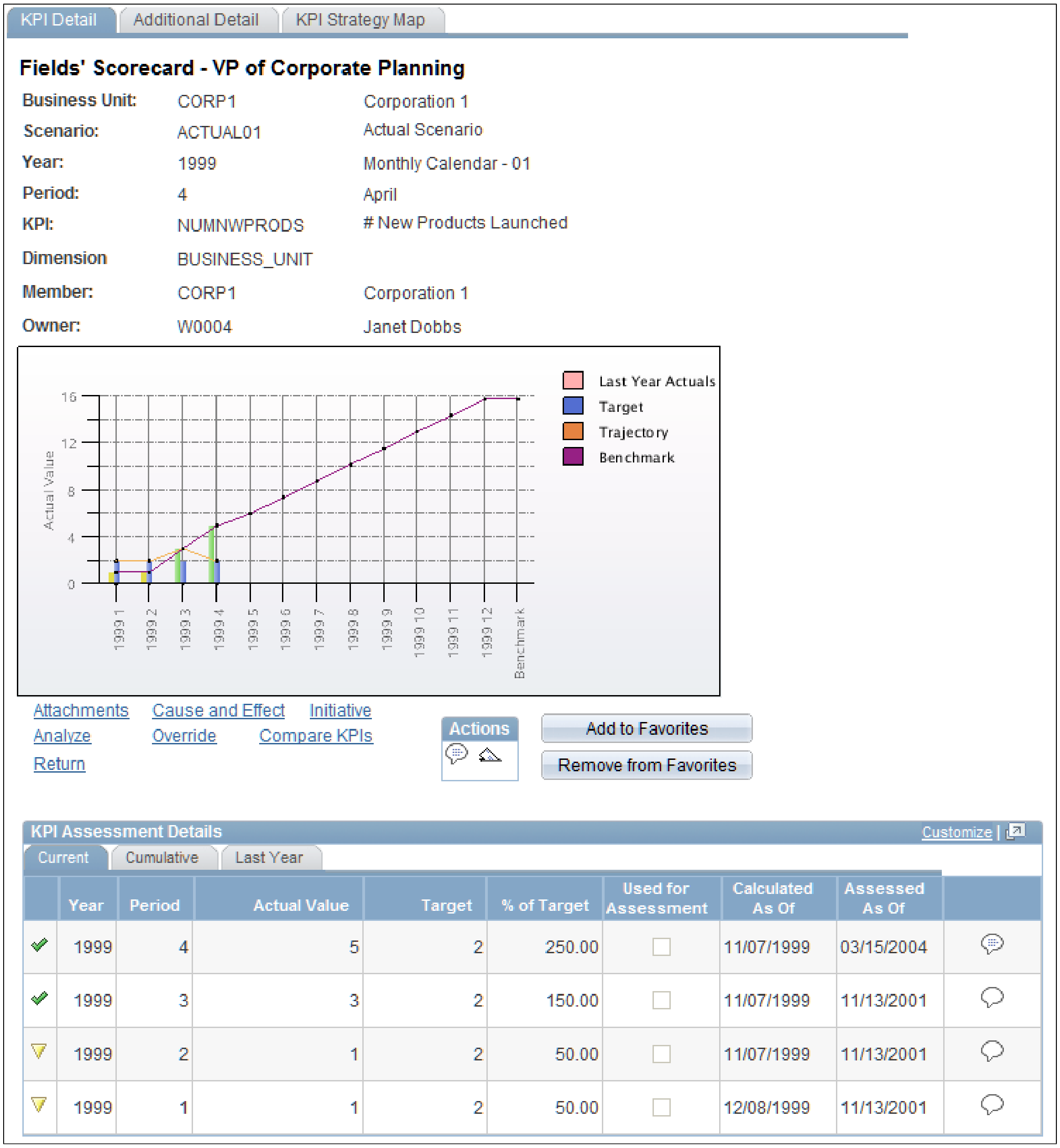
Use the KPI Detail page (BCIC_KPIDETAI3_PNL) to view assessment details for a KPI for current, cumulative, and prior year time frames.

Navigation

Click a KPI dimension member description from various pages, such as the KPI List page.

Image: KPI Detail page

This example illustrates the fields and controls on the KPI Detail page. You can find definitions for the fields and controls later on this page.



The bar chart shows the actual results, with line overlays of the percent of target over a period of time, last year's actual results, and the estimated results for future periods (trajectory) based on the current trends.

The hierarchy of the branch of scorecard strategy components to which this KPI is associated appears in the upper right. Click a description to view the strategy details page for a component. If you are not on a scorecard viewing page when you access the KPI Detail page, this hierarchy does not appear.

In the grid area, select a tab to review the current year's assessment results, cumulative assessment results, and last year's assessment results.

Select the Additional Detail tab to review target rules and other information about the KPI.

Select the KPI Strategy Map tab to view the cause and effect image map if one has been associated with the KPI.

KPI Compare Selection List Page

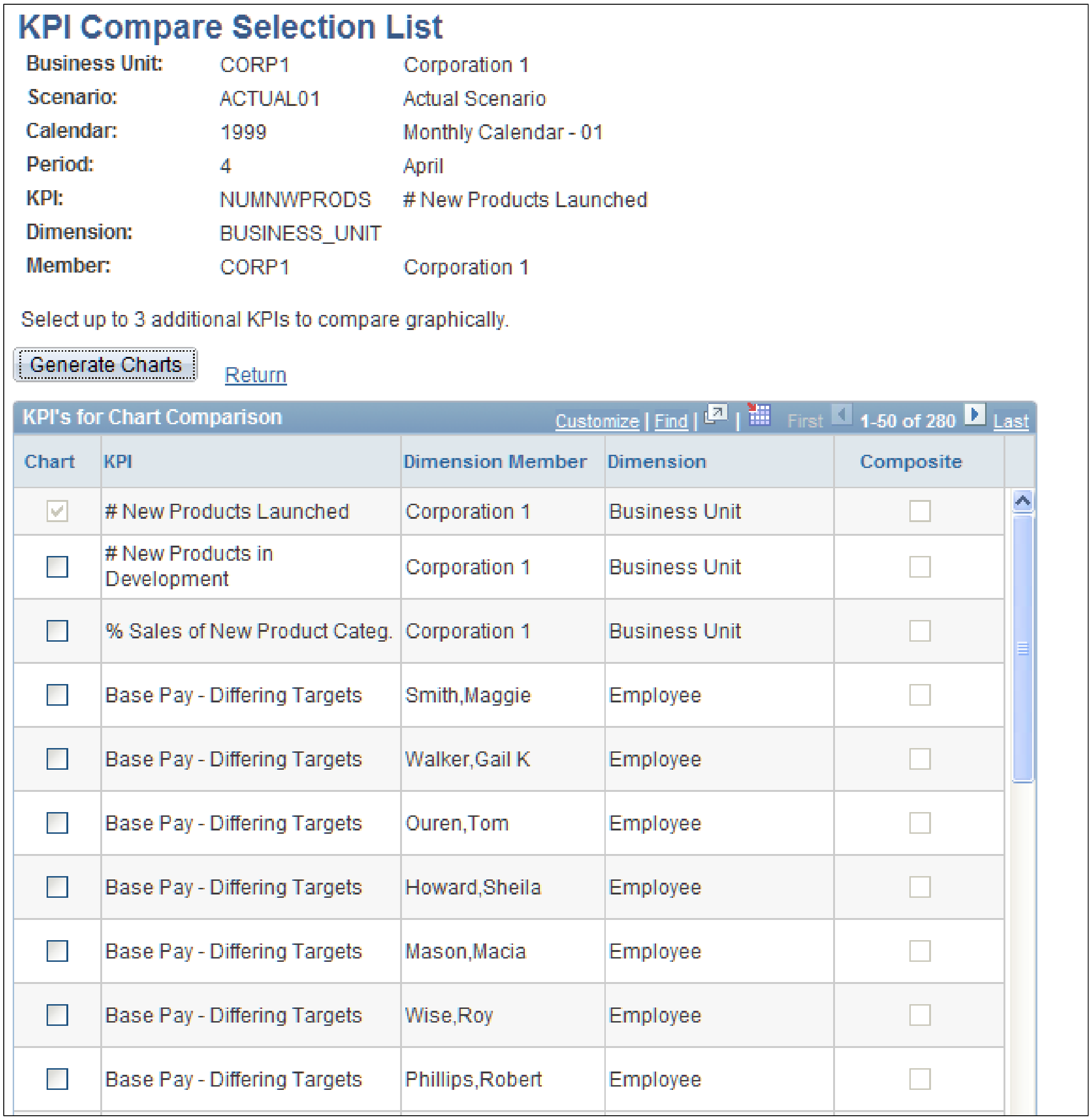
Use the KPI Compare Selection List page (BC_KPI_SELECT_LIST) to select KPIs to compare graphically.

Navigation

From the KPI Detail page, click the Compare KPIs link.

Image: KPI Compare Selection List page

This example illustrates the fields and controls on the KPI Compare Selection List page. You can find definitions for the fields and controls later on this page.



The grid contains a list of other KPIs and their dimension members. To graphically compare the current KPI with other KPIs, use the following options:

Chart

Select to chart the KPI dimension member that is associated with the row. You can select as many as three KPI dimension members to compare.

Generate Charts

Click to access the KPI Compare page, which displays a graph of the current KPI dimension member and a graph of each of the other KPI dimension members that you selected to chart (a maximum of three).

On the KPI Compare page, you can click a dimension member description to access the KPI Detail page for that KPI dimension member.

My KPIs Page

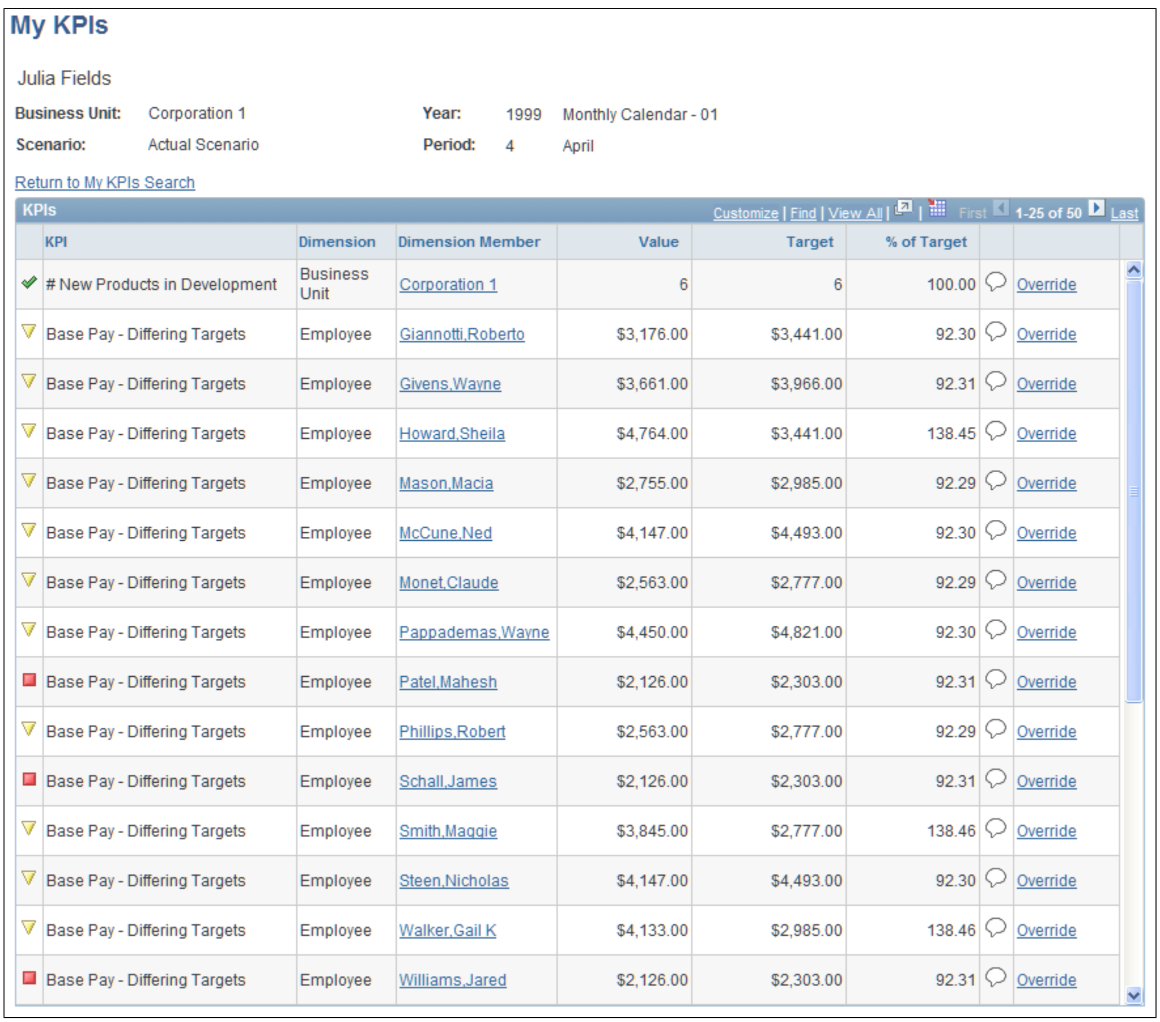
Use the My KPIs page (KP_KPILIST_OWNER) to review the KPIs that you have been assigned to as either the owner or associate owner for a specified business unit, scenario, fiscal year, and accounting period.

Navigation

Key Performance Indicators, View KPI Results, My KPIs. From the Search for My KPIs page, click Search.

Image: My KPIs page

This example illustrates the fields and controls on the My KPIs page. You can find definitions for the fields and controls later on this page.


My KPIs

Julia Fields

Business Unit: Corporation 1 Year: 1999 Monthly Calendar - 01

Scenario: Actual Scenario Period: 4 April

Return to My KPIs Search

KPIs Customize | Find | View All | First 1-25 of 50 Last

KPI	Dimension	Dimension Member	Value	Target	% of Target		
# New Products in Development	Business Unit	Corporation 1	6	6	100.00		Override
Base Pay - Differing Targets	Employee	Giannotti,Roberto	$3,176.00	$3,441.00	92.30		Override
Base Pay - Differing Targets	Employee	Givens,Wayne	$3,661.00	$3,966.00	92.31		Override
Base Pay - Differing Targets	Employee	Howard,Sheila	$4,764.00	$3,441.00	138.45		Override
Base Pay - Differing Targets	Employee	Mason,Macia	$2,755.00	$2,985.00	92.29		Override
Base Pay - Differing Targets	Employee	McCune,Ned	$4,147.00	$4,493.00	92.30		Override
Base Pay - Differing Targets	Employee	Monet,Claude	$2,563.00	$2,777.00	92.29		Override
Base Pay - Differing Targets	Employee	Pappademas,Wayne	$4,450.00	$4,821.00	92.30		Override
Base Pay - Differing Targets	Employee	Patel,Mahesh	$2,126.00	$2,303.00	92.31		Override
Base Pay - Differing Targets	Employee	Phillips,Robert	$2,563.00	$2,777.00	92.29		Override
Base Pay - Differing Targets	Employee	Schall,James	$2,126.00	$2,303.00	92.31		Override
Base Pay - Differing Targets	Employee	Smith,Maggie	$3,845.00	$2,777.00	138.46		Override
Base Pay - Differing Targets	Employee	Steen,Nicholas	$4,147.00	$4,493.00	92.30		Override
Base Pay - Differing Targets	Employee	Walker,Gail K	$4,133.00	$2,985.00	138.46		Override
Base Pay - Differing Targets	Employee	Williams,Jared	$2,126.00	$2,303.00	92.31		Override

The following columns appear in the KPIs grid.

<assessment image>	Displays the assessment results.
KPI	Displays the KPI description.
Dimension Member	Displays the dimension member description. Click to access the KPI Detail page for the dimension member.
Value	Displays the resolved value for the KPI dimension member.
Target	Displays the target value for the KPI dimension member.
% of Target (percent of target)	Displays the percentage of the actual value compared to its target value.
Add/View Comments ( ) or ( )	Click to access the Comments page, where you can add comments or review the history of entered comments. If no comments currently exist, the button that appears does not have lines in it.
Override	Click to access the Manual Assessment page, where you can override the current assessment by specifying a different assessment.

Related Links

(Add/View) Comments Page
Manual Assessment Page

Portfolio KPI Analysis Page

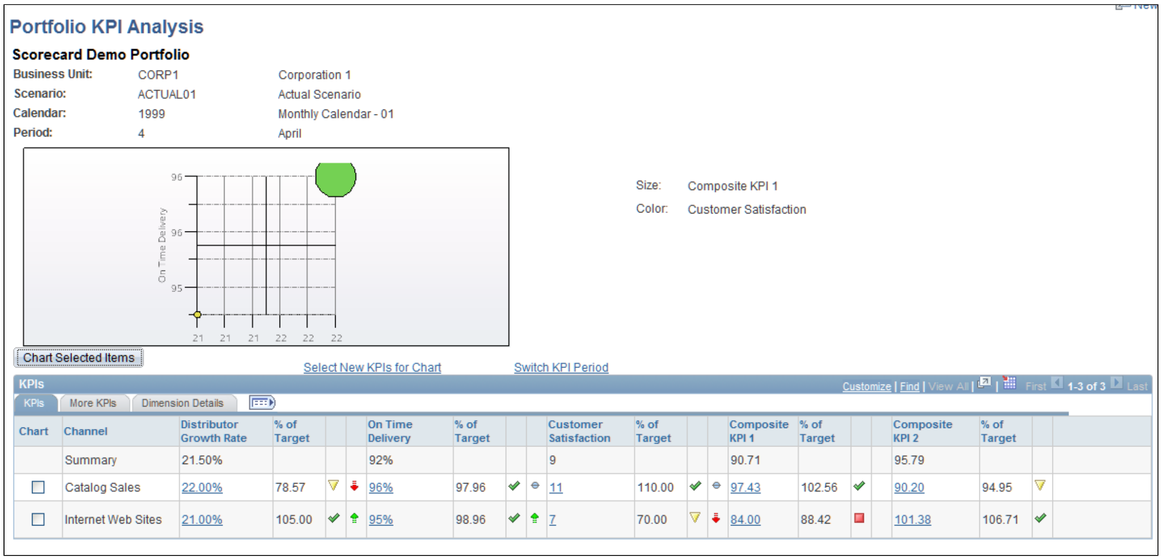
Use the Portfolio KPI Analysis page (BC_PORT_ANALYSIS) to view the KPIs within a selected portfolio.

Navigation

Scorecards, View Scorecard Results, Portfolios. From the Portfolios page, click the KPIs link for a portfolio.

Image: Portfolio KPI Analysis page

This example illustrates the fields and controls on the Portfolio KPI Analysis page. You can find definitions for the fields and controls later on this page.



Bubble Chart

The bubble chart displays circles on the x and y axes for the KPIs that are selected on the Select KPIs for Chart page. Each axis is labelled with the KPI that it represents. You establish this chart's configuration on the Portfolio Definition - KPIs page.

Each "bubble" on the chart represents values for a different KPI dimension member. You can view the names (descriptions) by moving your mouse pointer over the bubbles.

The size and color of the bubbles is controlled by the KPIs that are selected on the Select KPIs for Chart page.

The colors that are displayed for the objects correspond to the assessment colors for the selected data, and the size of each bubble is related to the resolved value for the charted KPIs. The KPIs that are used for size and color are displayed next to the chart.

Actions

Chart Selected Items Click to update the chart using the dimensions members that are selected in the grid.

Select New KPIs for Chart Click to access the Select KPIs for Chart page, where you can change the KPIs that are displayed. The KPIs that are available to you depend on your row-level security.

Switch KPI Period Click to access the Portfolio KPI Analysis - Select New KPI Search Criteria page, where you can specify a different business unit, scenario, fiscal year, and period for which to view results.

KPIs

The column labels in this grid vary according to selections made for the portfolio in the Portfolio Definition component. Each KPI in the portfolio appears as the label for one column, followed by columns for one or more of the following: % of target, assessment, trend, and any object attributes that are selected.

Chart Select the check boxes next to the dimensions that you want to chart.

<dimension description> Lists the dimension for the KPI.

<KPI description> Displays the KPI description.

One or more columns within the grid are labeled with the descriptions of the KPIs that are selected on the Portfolio Definition - KPIs page. The values in these columns are the actual values for the KPI dimension members in the corresponding rows. Click the linked value in any row to access the KPI Detail page, where you can view additional detail for that KPI.

% of Target (percent of target) The percent of target for the KPI dimension member (the percentage of the actual value compared to its target value). This column appears for a given KPI if the Show % of Target check box is selected for that KPI on the Portfolio Definition - KPIs page.

<assessment image> Displays the assessment results for the KPI dimension member. This column appears for a given KPI if the Show Assessment check box is selected for that KPI on the Portfolio Definition - KPIs page.

Trend Displays the performance trend for the KPI dimension member. This column appears for this KPI if the Show Trend check box is selected for this KPI on the Portfolio Definition - KPIs page.

Related Links

Establishing Portfolios

KPI Analysis Page

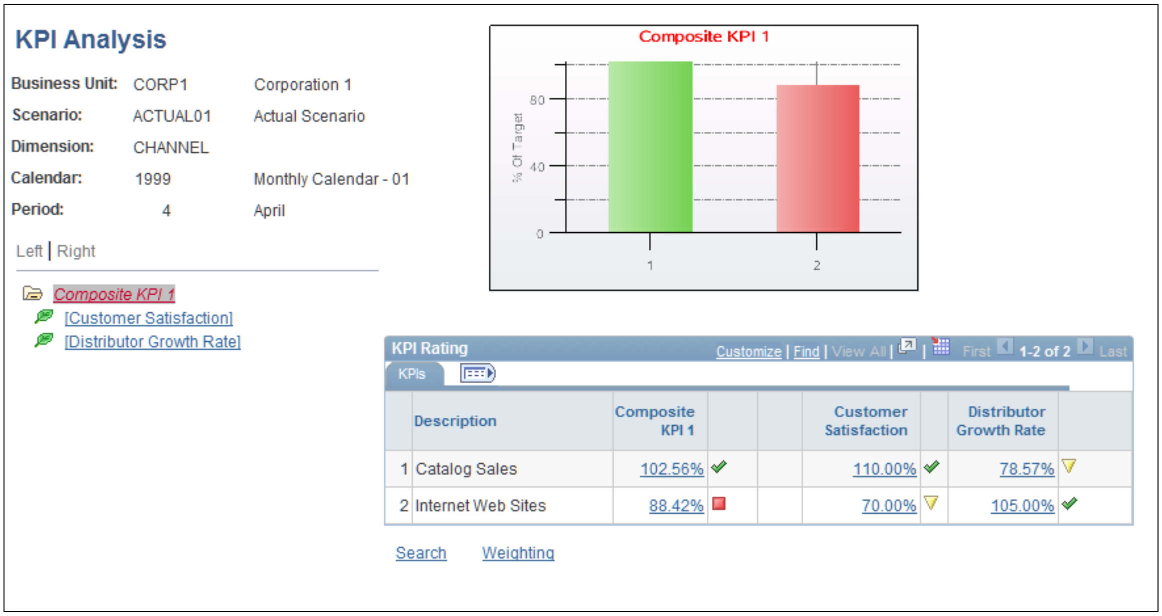
Use the KPI Analysis page (BC_PE_CKPI_ANLY_1) to analyze KPIs and composite KPIs.

Navigation

- Scorecards, View Scorecard Results, KPI Analysis
- On the KPI Analysis page, click Search.

Image: KPI Analysis page

This example illustrates the fields and controls on the KPI Analysis page. You can find definitions for the fields and controls later on this page.



 **and** 	Click to expand or collapse the list of KPIs that make up a composite KPI. This option appears for only composite KPIs.
<KPI description>	Click a KPI description to display data for the selected KPI in the chart and the grid areas of this page. The description of the selected KPI appears above the chart. The details for the selected KPI appears below the chart.
Search	Click to access the KPI Analysis search page, where you can specify the business unit, scenario, year, period, and KPI to analyze.
Weighting	Click to access the KPI Weighting page, where you can change the relative weighting for each component KPI.

KPI Rating

The grid is made up of the KPI dimension members and the percent of target that they achieved, the assessment image, and trend. If a composite KPI is selected, the grid will contain these same columns for each KPI that makes up the composite KPI.

<dimension description>	The first column contains the description for the dimension, and lists the dimension members.

<KPI description>

The KPI description appears in the next column, and lists the percent of target achieved. Click a percent-of-target value to access the KPI detail page, where you can review more information about the KPI results.

Related Links

Composite KPI Page

KPI Analysis - Weighting Page

Use the KPI Analysis - Weighting page (BC_PE_CKPI_ANLY_2) to change the weighting for KPIs that make up a composite KPI to display new results on the KPI Analysis page.

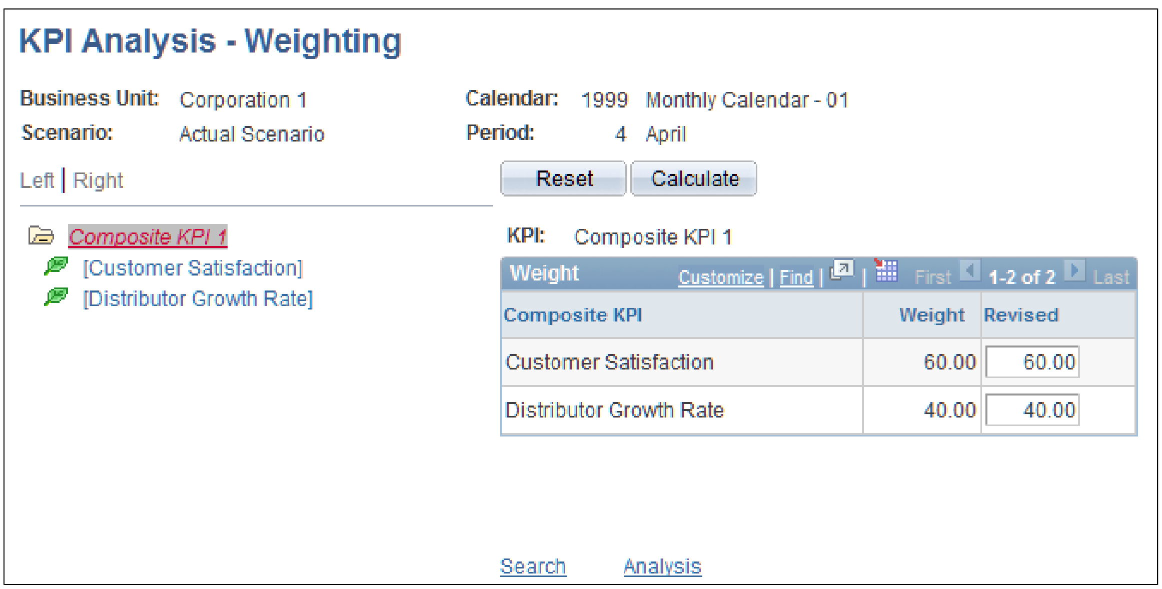
These results are not saved.

Navigation

Click the Weighting link on the KPI Analysis page. This link appears for composite KPIs only.

Image: KPI Analysis - Weighting page

This example illustrates the fields and controls on the KPI Analysis - Weighting page. You can find definitions for the fields and controls later on this page.



Reset

Click to reset changes that were made in weighting to the displayed values in the weight column.

Calculate

Click to calculate the revised values and return to the KPI Analysis page to view the changed values in the chart and the grid. This does not change the database values.

and

Click to expand or collapse the list of KPIs that make up a composite KPI.

	Each leaf represents a single KPI. A composite KPI may include standard KPIs or a combination of composite and standard KPIs.

Weight

Composite KPI	The KPIs that make up the composite
Weight	The weighting set in the definition of the composite KPI.
Revised	Enter the weighting that you want to display. The numbers must total 100 percent. Click the Calculate button to display the results of the weighting that you entered.

Analyze - KPI Tree Page

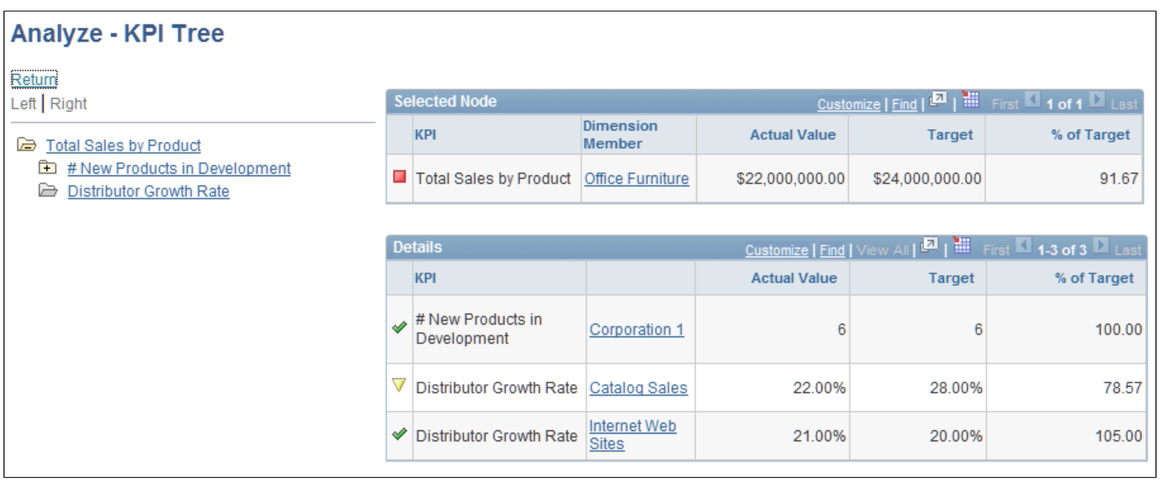
Use the Analyze - KPI Tree page (KP_ANALYZE_TREE) to navigate through the KPI analysis tree that is associated with a KPI.

Navigation

Click Analyze on the KPI Detail Page. On the Analyze page, click a tree description in the KPI Analysis Path grid.

Image: Analyze – KPI Tree page

This example illustrates the fields and controls on the Analyze – KPI Tree page. You can find definitions for the fields and controls later on this page.



 **and** 	Click to expand or collapse the KPIs that make up the KPI tree.
<KPI description>	In the KPI tree, click a node description (a KPI description) to view information about the selected node and details of the KPIs in the level immediately subordinate to it in the Selected Node and Details grids, respectively.

Dimension Member	Displays the KPI's dimension members. Click a member description to access the KPI Detail page for that KPI dimension member, where you can view additional details.

Hierarchical KPI Page

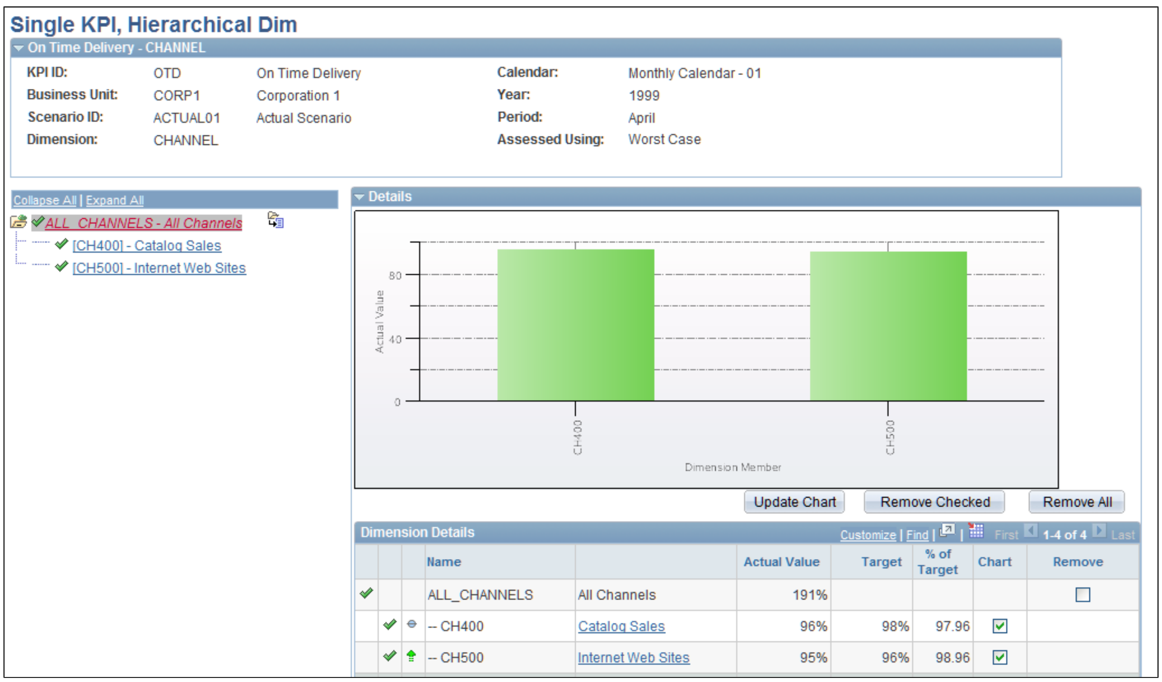
Use the Hierarchical KPI page (KP_VIEW_NODE_KPI) to view assessment results for hierarchical KPIs by navigating through the KPI tree.

Navigation

- Click the View Hierarchy button on various pages..
- Key Performance Indicators, View KPI Results, Single KPI, Hierarchical Dim

Image: Hierarchical KPI page

This example illustrates the fields and controls on the Hierarchical KPI page. You can find definitions for the fields and controls later on this page.



Tree Controls

The nodes of the dimension hierarchy tree for the KPI appear in the tree control area.

 **and** 	Click to expand or collapse the tree nodes to view the immediately subordinate members of that node, and their current assessment.
<node description>	Click to view the detail values of the members of that node within the Detail group box.

 Click to add the data for the selected node into the Details group box for analysis.

Details

Expand the Details group box to view details for the dimension tree nodes.

Initially, the information that appears in this group box is for only the selected node. The graph shows the actual values for the selected node, and the grid lists the assessment results, actual values, target values, and percent of target. If the node that is selected has children that are the detail dimension members, then the grid will also contain the KPI values for those dimensions members.

<KPI description> Click to access the KPI Detail page for the KPI dimension member.

Chart Select to chart the associated data when you refresh the chart by clicking the Update Chart button.

Remove Select to exclude the associated data from the Details grid when you click the Remove Checked button.

Update Chart Click to refresh the chart.

Remove Checked Click to remove the data for any dimension members for which you have selected the Remove check box.

Remove All Click to clear all data.

Administering Scorecards and KPIs

This topic discusses how to:

- Override KPI assessments.
- Enter or view comments.
- Approve comments.
- Send emails.
- View attachments.

Pages Used to Administer Scorecards and KPIs

Page Name	***Definition Name***	***Navigation***	***Usage***
Manual Assessment	BC_KPI_ASMT_OVRD	From the KPI Detail page, click the Override link.	Override an assessment or review the history of past overrides.
(Add/View) Comments	BC_COMMENTS_F00	Click the or button.	View or enter comments.

Page Name	***Definition Name***	***Navigation***	***Usage***
Comment Approval	BC_COMM_APPRVL_F00	• Worklist, Worklist • Click the Worklist link at the top of the home page. From your worklist, click a comment approval entry.	Approve comments that have been routed to you.
Send Email	BC_EMAIL_ICLNT	Click the button on the Manual Assessment page, the KPI Detail page, or the Strategy Detail page.	Send an email.
Attachments	BC_VIEW_REPORTS	• Click the button from various pages, including the Scorecard at a Glance page, KPI Detail page, or KPI List page. • Click the Attachments link from various pages.	View files that are associated with KPIs or strategy components.

Related Links

Understanding Workflow Functionality

System Options Page

Manual Assessment Page

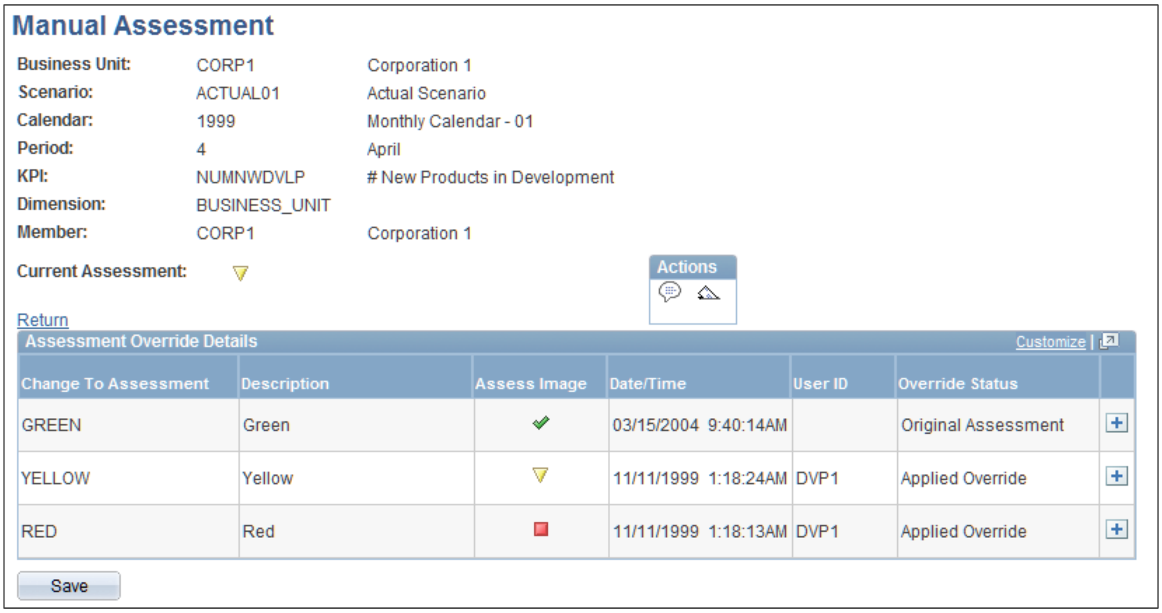
Use the Manual Assessment page (BC_KPI_ASMT_OVRD) to override an assessment or review the history of past overrides.

Navigation

From the KPI Detail page, click the Override link.

Image: Manual Assessment page

Manual Assessment page



To override an assessment:

1. Add a new row in the grid.
2. Choose from the valid values in the Change to Assessment field.

   The remaining fields will be populated with the appropriate values and will provide an audit trail for tracking assessment changes.

   The Override Status field indicates assessment status. Values are:

Pending	The value was changed, and has been approved (if required) but not yet processed.
Applied	The value was applied to the assessment (the apply manual assessments jobstream was run).
Denied	Workflow is enabled, and approval was denied. The original value is still used.
Original	The original value.

   When you change an assessment, it will initially be set to *Pending*.
3. Click Save.
4. Click OK to confirm the changes.
5. If override approval workflow is enabled for this KPI, you must enter a comment for the override, and it will be routed to your supervisor for approval.

6. Before the new value will be applied, you must run the Apply Manual Assessments jobstream.

(Add/View) Comments Page

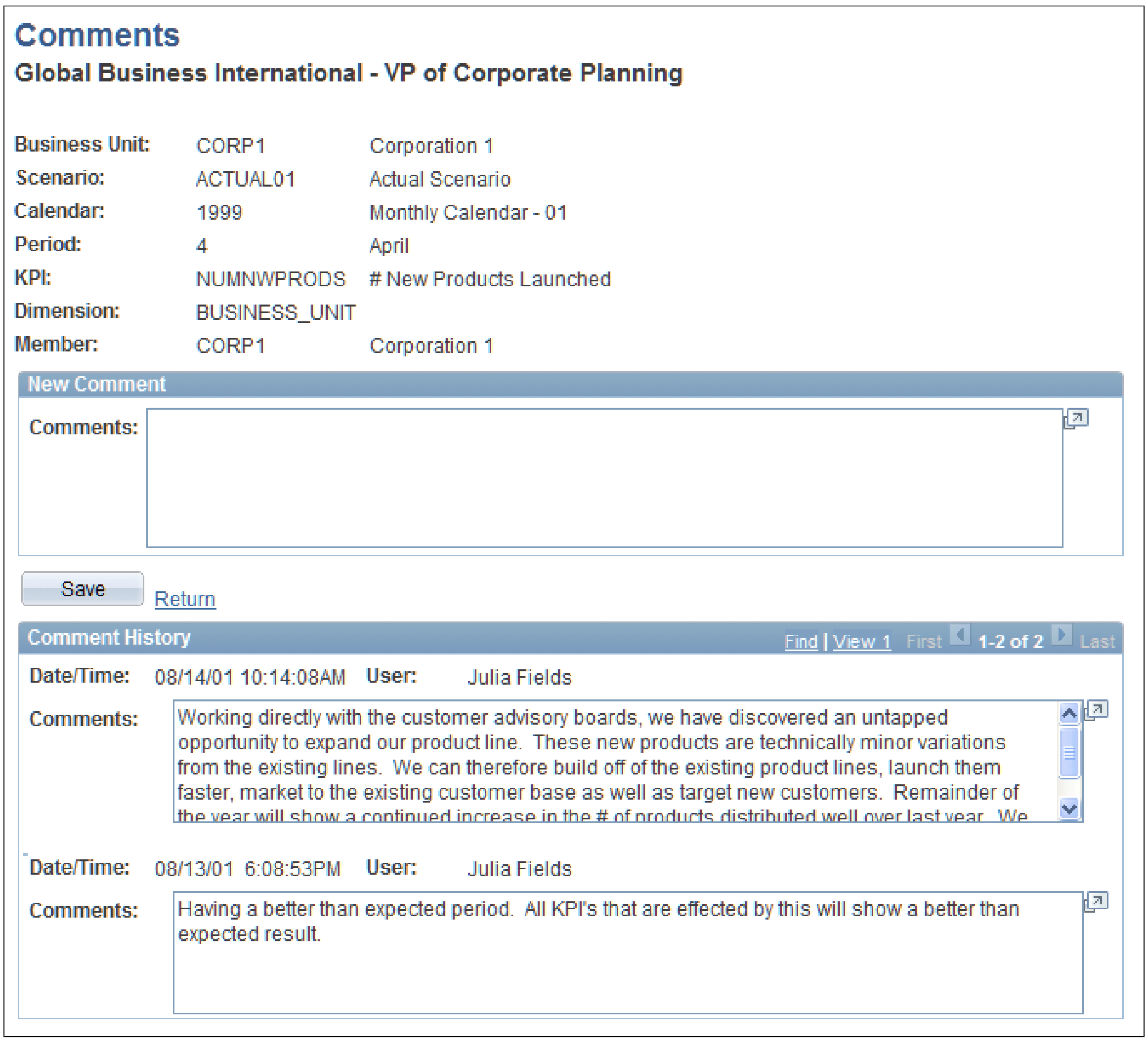
Use the (Add/View) Comments page (BC_COMMENTS_F00) to view or enter comments.

Navigation

Click the comments button on various pages.

Image: Comments page

This example illustrates the fields and controls on the Comments page. You can find definitions for the fields and controls later on this page.



To enter or review comments:

1. Enter comments in the Comments field within the New Comment group box.
2. Click Save.
3. If workflow processing is enabled for this KPI, it will be routed to a supervisor for approval.

4. Review prior comments by looking at the comment history.

   Click the arrow buttons to view the next or previous comment. Click View All to review all comments.

Comment Approval Page

Use the Comment Approval page (BC_COMM_APPRVL_F00) to approve comments that have been routed to you.

Navigation

- Worklist, Worklist
- Click the Worklist link at the top of the home page. From your worklist, click a comment approval entry.

1. Update the status of the comment.

   When you initially view the comment, its status is *Pending.* Select *Approved* or *Denied.*

2. If you deny a comment, the system sends an email back to the person who entered the comment and sends you a carbon copy.

   If the comment is linked to an assessment override, the system does not use the modified assessment.

Send Email Page

Use the Send Email page (BC_EMAIL_ICLNT) to send an email.

Navigation

Click the button on the Manual Assessment page, the KPI Detail page, or the Strategy Detail page.

1. Complete the fields.

   Use complete email addresses, such as Bob_Smith@CompanyName.com.

2. Click Send˙.

Attachments Page

Use the Attachments page (BC_VIEW_REPORTS) to view files that are associated with KPIs or strategy components.

Navigation

- Click the button from various pages, including the Scorecard at a Glance page, KPI Detail page, or KPI List page.
- Click the Attachments link from various pages.
- The file appears in a new window.

Viewing Predefined Queries for Scorecards and KPIs

This topic provides an overview of the delivered queries and discusses how to run the predefined queries for scorecards and KPIs.

Page Used to View Predefined Queries for Scorecards and KPIs

Page Name	***Definition Name***	***Navigation***	***Usage***
Query Viewer	QUERY_VIEWER_SRCH	Reporting Tools, Query, Query Viewer	Run a predefined query.

Understanding the Delivered Queries

Several queries are available that provide information about scorecards and KPIs. You run these queries using PeopleSoft Query Manager, and optionally generate a report using these queries. The following table lists the delivered queries. All of these queries are public queries.

Query ID	***Description***	***Usage***
BSC0001	Scorecards by Strategy Tree	Lists scorecards by strategy tree.
BSC0002	Scorecards by KPI	Lists scorecards associated with the specified KPI.
BSC0004	Strategy Trees w/Non-Terminal	Lists KPIs assigned to components that aren't at the end of a tree branch for the specified tree.
BSC0005	Strategy Comp by Strat Init	Lists the strategy components associated with a strategic initiative.
BSC0006	Key Perf Ind by Strat Initiati	Lists all KPIs by strategic initiative.
BSC0007	Key Perf Ind and Calc by Model	Lists KPIs by model ID.
BSC0008	KPI, Target Rules Act by Model	Lists target rules and actions for KPI dimension members by model.
BSC0009	Strategy Components by Perspec	Lists the strategy components for a SetID categorized by perspective.
BSC0010	Key Perform Ind by Perspective	Lists all the KPIs by SetID for the specified perspectives.
BSC0011	Strategy Components by KPI	Lists the strategy components associated with the specified KPI by SetID.
BSC0012	Strategy Trees with Dup KPIs	Lists duplicate KPIs by SetID and strategy tree.

Query ID	***Description***	***Usage***
BSC0013	Scorecard Assessment	Lists assessment results for scorecard components by fiscal year, accounting period, and scorecard ID for the specified business unit and scenario.
BSC0014	KPI Detail	Lists the history of assessment results for KPI dimension members.
BSC0015	KPI Target Rule Values	Lists the target types, rules, and target values for each KPI dimension member by business unit.
BSC0016	KPI Data Element Values	Lists data elements and their associated objects' values by business unit.

Query Viewer Page

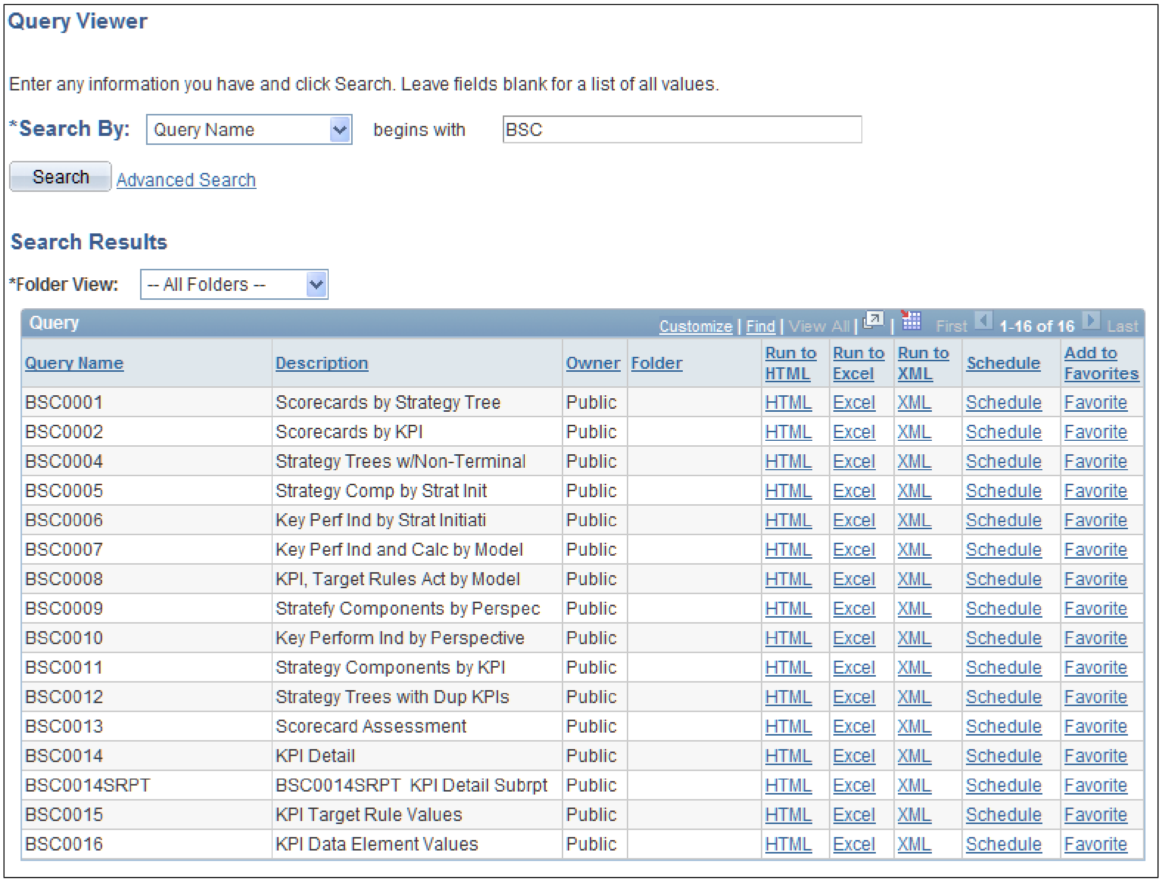
Use the Query Viewer page (QUERY_VIEWER_SRCH) to run a predefined query.

Navigation

Reporting Tools, Query, Query Viewer

Image: Query Viewer page

This example illustrates the fields and controls on the Query Viewer page. You can find definitions for the fields and controls later on this page.



Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By: Query Name begins with BSC

Search Advanced Search

Search Results

*Folder View: -- All Folders --

Query Customize | Find | View All | First 1-16 of 16 Last

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
BSC0001	Scorecards by Strategy Tree	Public		HTML	Excel	XML	Schedule	Favorite
BSC0002	Scorecards by KPI	Public		HTML	Excel	XML	Schedule	Favorite
BSC0004	Strategy Trees w/Non-Terminal	Public		HTML	Excel	XML	Schedule	Favorite
BSC0005	Strategy Comp by Strat Init	Public		HTML	Excel	XML	Schedule	Favorite
BSC0006	Key Perf Ind by Strat Initiati	Public		HTML	Excel	XML	Schedule	Favorite
BSC0007	Key Perf Ind and Calc by Model	Public		HTML	Excel	XML	Schedule	Favorite
BSC0008	KPI, Target Rules Act by Model	Public		HTML	Excel	XML	Schedule	Favorite
BSC0009	Stratefy Components by Perspec	Public		HTML	Excel	XML	Schedule	Favorite
BSC0010	Key Perform Ind by Perspective	Public		HTML	Excel	XML	Schedule	Favorite
BSC0011	Strategy Components by KPI	Public		HTML	Excel	XML	Schedule	Favorite
BSC0012	Strategy Trees with Dup KPIs	Public		HTML	Excel	XML	Schedule	Favorite
BSC0013	Scorecard Assessment	Public		HTML	Excel	XML	Schedule	Favorite
BSC0014	KPI Detail	Public		HTML	Excel	XML	Schedule	Favorite
BSC0014SRPT	BSC0014SRPT KPI Detail Subrpt	Public		HTML	Excel	XML	Schedule	Favorite
BSC0015	KPI Target Rule Values	Public		HTML	Excel	XML	Schedule	Favorite
BSC0016	KPI Data Element Values	Public		HTML	Excel	XML	Schedule	Favorite

Retrieve one of the delivered queries (they all begin with *BSC*), and click one of the run options.

See also *PeopleTools: PeopleSoft Query* and *PeopleTools: Crystal Reports for PeopleSoft*.

Creating and Viewing Dashlets

This topic provides an overview of the KPI Dashboard, lists common elements, and discusses how to:

- Create and view KPI dashboards.
- Specify dashlet format and time period.
- Define the dashlet data.
- Specify table options.
- Specify chart options.

Pages Used to Create and View Dashlets

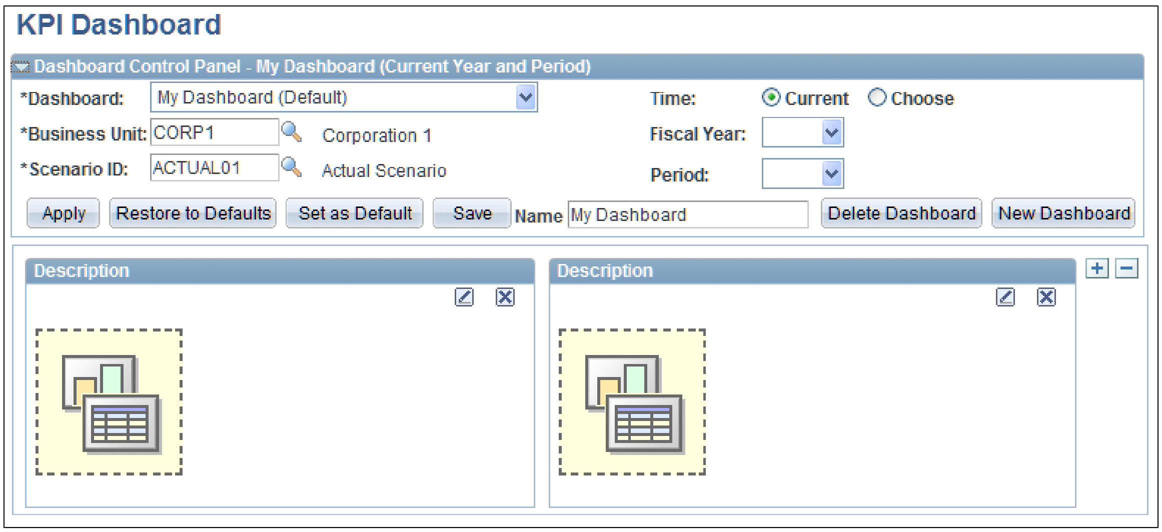
Page Name	*Definition Name*	*Navigation*	*Usage*
KPI Dashboard	KP_DASHBOARD	Key Performance Indicators, View/Modify KPI Dashboard	Create and view KPI dashboards.
Create new Dashboard	KP_NEW_DASHBOARD	On the KPI Dashboard page, click Create New Dashboard.	Name a new KPI dashboard.
Dashlet Definition - Basic Information	KP_DLET_WIZARD_1	On the KPI Dashboard page, click the Configure Dashlet button.	Specify dashlet format and time period.
Dashlet Definition - Data	KP_DLET_WIZARD_2	• On the Dashlet Definition - Basic Information page, click Next or 2. • Click the number 2 from any of the other pages in the KPI Dashboard Wizard.	Define the KPI data to use for a dashlet.
Choose KPIs	BC_DO_SELECTION	On the Dashlet Definition - Data page, click Select KPIs to Display.	Select the KPIs to include in a dashlet.
Choose Dimension Members	BC_DO_SELECTION_1	On the Dashlet Definition - Data page, click Select Dimension Members.	Select the dimension members to include in a dashlet.
Dashlet Definition - Table Details	KP_DLET_WIZARD_3	• On the Dashlet Definition - Data page for a table-based dashlet, click Next or 3. • Click the number 3 from any of the other pages in the KPI Dashboard Wizard.	Specify table display options.
Dashlet Definition - Chart Details	KP_DLET_WIZARD_3C	• On the Dashlet Definition - Data page for a chart-based dashlet, click Next or 3. • Click the number 3 from any of the other pages in the KPI Dashboard Wizard.	Specify chart display options.

Understanding the KPI Dashboard

The KPI Dashboard enables you to view and create KPI dashlets. KPI dashlets are small pages that provide display-only snapshots of KPI results. You can create dashlets that contain KPI data in either a graphical or grid-based table format. The KPI Dashboard includes a control panel, the dashlet display area, and the KPI Dashboard Wizard. When you access the KPI Dashboard component, the system displays the default dashboard. Initially, the default dashboard is the delivered dashboard configuration, *My Dashboard (Default).* which contains two empty dashlets in the dashlet display area. Subsequently when you access the component, whichever configuration you save as your default configuration will be active. You can either modify and save the My Dashboard (Default) configuration or create a new dashboard and set it as your default dashboard. If at some point you delete all saved dashboard configurations, the system generates a new *My Dashboard (Default)* configuration with two empty dashlets in the dashlet display area.

Image: KPI Dashboard

This example illustrates the fields and controls on the KPI Dashboard. You can find definitions for the fields and controls later on this page.



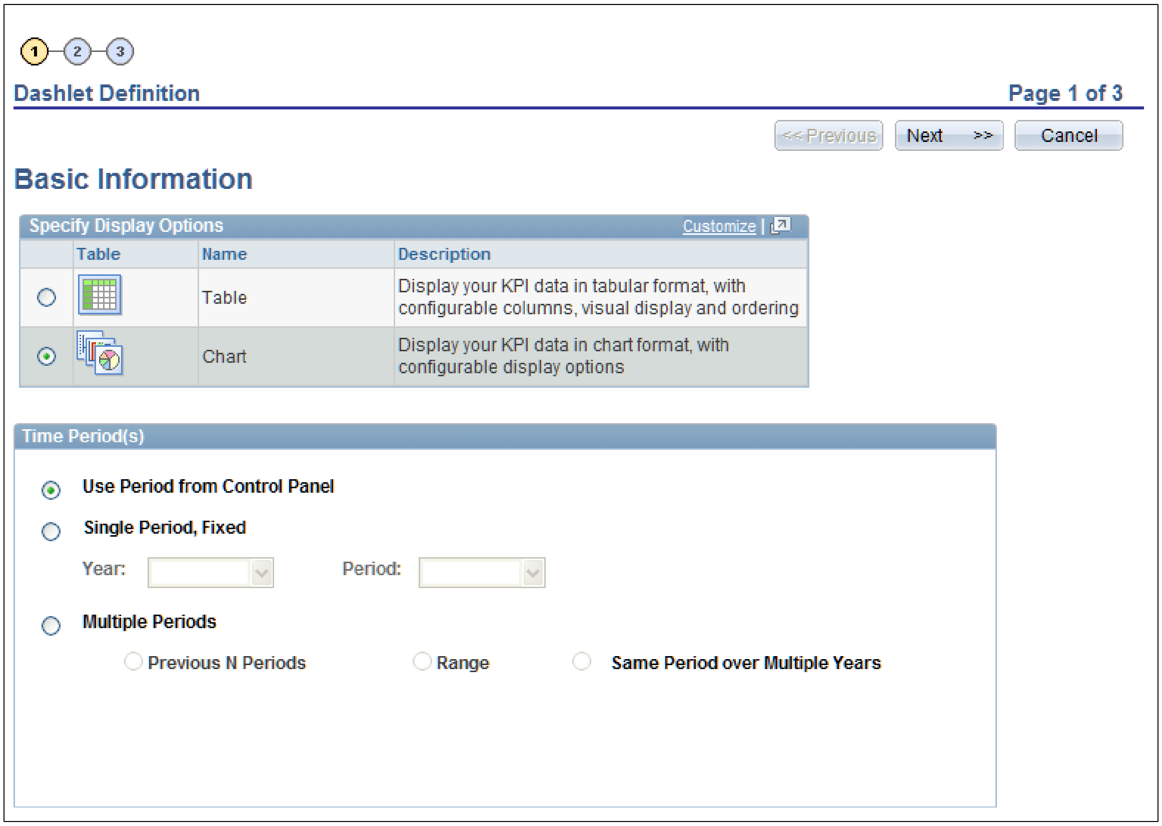
KPI Dashboard Wizard

The KPI Dashboard Wizard provides a user-friendly, browser-based graphical user interface (GUI) that leads you through the series of steps involved in creating and publishing a KPI dashlet.

You do not need to have PeopleSoft-specific application development tools or skills to use the KPI Dashboard Wizard to create dashlets. During the dashlet-creation process, the KPI Dashboard GUI presents a series of numbered steps. Each step appears in a numbered path at the top of the KPI Dashboard Wizard pages to indicate where you are in the dashlet-creation process.

Image: KPI Dashboard Wizard

This example illustrates the fields and controls on the KPI Dashboard Wizard. You can find definitions for the fields and controls later on this page.



This labeled path assists you in navigating through the steps, and it enables you to review or edit dashlet definition values. When you've completed a step, KPI Dashlet Wizard automatically takes you to the next appropriate step. The Dashlet Wizard GUI leads you through the following steps that are used to create a dashlet:

1. Select the display format.
2. Specify the timeframe.
3. Define the KPI data to use.
4. Configure the chart or table, and preview the chart.

KPI Dashboard Control Panel

The dashboard control panel is a collapsible group box on the KPI Dashboard page that enables you to:

- Load, save, and delete dashboard configurations.
- Specify which business unit, scenario, fiscal year, and period to view.

The system automatically uses the business unit and scenario that are specified in your profile definition, but you can specify other values. If you have not yet established a profile, the system automatically transfers you to the My Profile page, where you can define these values. You can save multiple dashboard configurations, identifying them by assigning a name.

Related Links

System Options Page

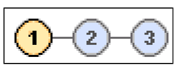
Common Elements Used in This Creating and Viewing Dashlets

Next Click to access the next page within the wizard.

Previous Click to access the previous page within the wizard.

Cancel Click to quit the wizard without saving any changes that you made to the dashlet configuration.

Finish Click to quit the wizard and retain any changes that you made to the dashlet configuration.



Click a number to access that specific page number within the wizard. The number for the current page is indicated by boldface and a different color than the other wizard page numbers.

KPI Dashboard Page

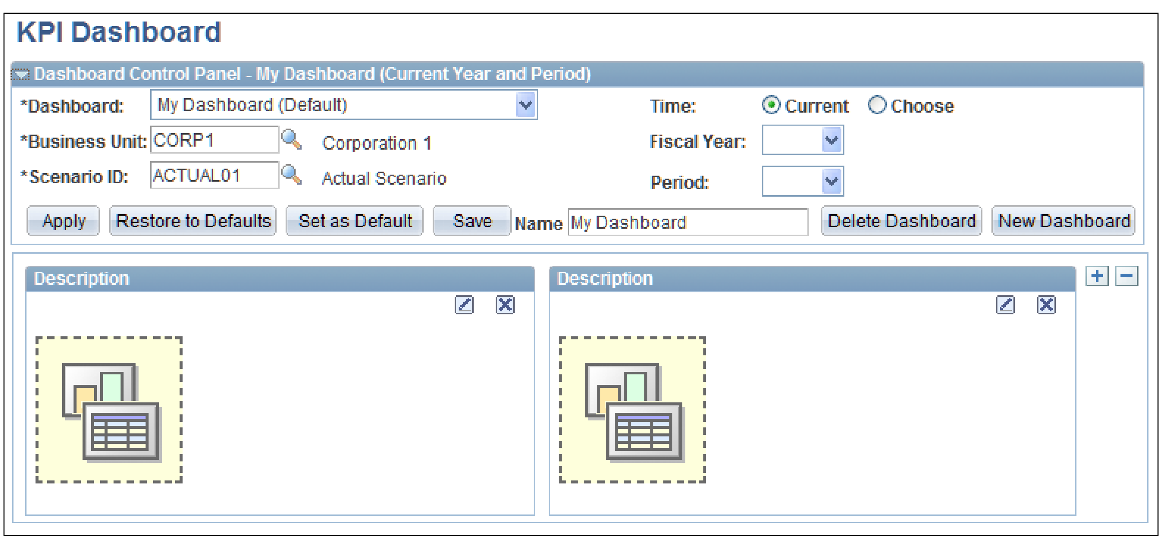
Use the KPI Dashboard page (KP_DASHBOARD) to create and view KPI dashboards.

Navigation

Key Performance Indicators, View/Modify KPI Dashboard

Image: KPI Dashboard page

This example illustrates the fields and controls on the KPI Dashboard page. You can find definitions for the fields and controls later on this page.



Dashboard Control Panel - <dashboard name> (<year and period>)

Dashboard	Select the name of the dashboard configuration to view.
Business Unit	Select the business unit for which to view KPI data. This field contains the business unit that is specified on your profile by default.
Scenario ID	Select the scenario for which to view KPI data. This field contains the business unit that is specified on your profile by default.
Time	Specify the timeframe for which to view KPI data. Options are: *Current:* Select to view data from the current fiscal year and period. *Choose:* Select to use data from a particular timeframe. You must also complete the Fiscal Year and Period fields when you use this option.
Fiscal Year	Select the fiscal year for which to view data. This field is available for entry only if Time is set to *Choose.*
Period	Select the accounting period for which to view data. This field is available for entry only if Time is set to *Choose.*
Apply	Click to activate any changes that you have made and refresh the screen.
Restore to Defaults	Click to revert to the last saved version of the dashboard that you are currently viewing.
Set as Default	Click to save the current dashboard configuration settings as the default dashboard configuration.
Save	Click to save the current settings to the name that is specified in the Name field. If a configuration already exists using that name, then it is overwritten.
Name	Enter a name for the dashboard configuration. When you click Save, the system saves the current settings to the name that you enter in this field.
Delete Dashboard	Click to delete the active dashboard configuration.
New Dashboard	Click to access the Create new Dashboard page, where you can enter a name for a new dashboard to create.

Dashlet Rows

The area of the page below the Dashlet Control Panel group box contains your dashlets. When you first access this page, it contains a single row with two undefined dashlets. Use the following buttons to interact with the dashlets:

Click the Configure Dashlet button to access the Dashboard Wizard, where you can configure the dashlet.

Click the Delete Dashlet button to delete the dashlet.

Click the Insert Row button to insert an additional dashlet row.

Click the Delete Row button to delete a dashlet row.

Dashlet Definition - Basic Information Page

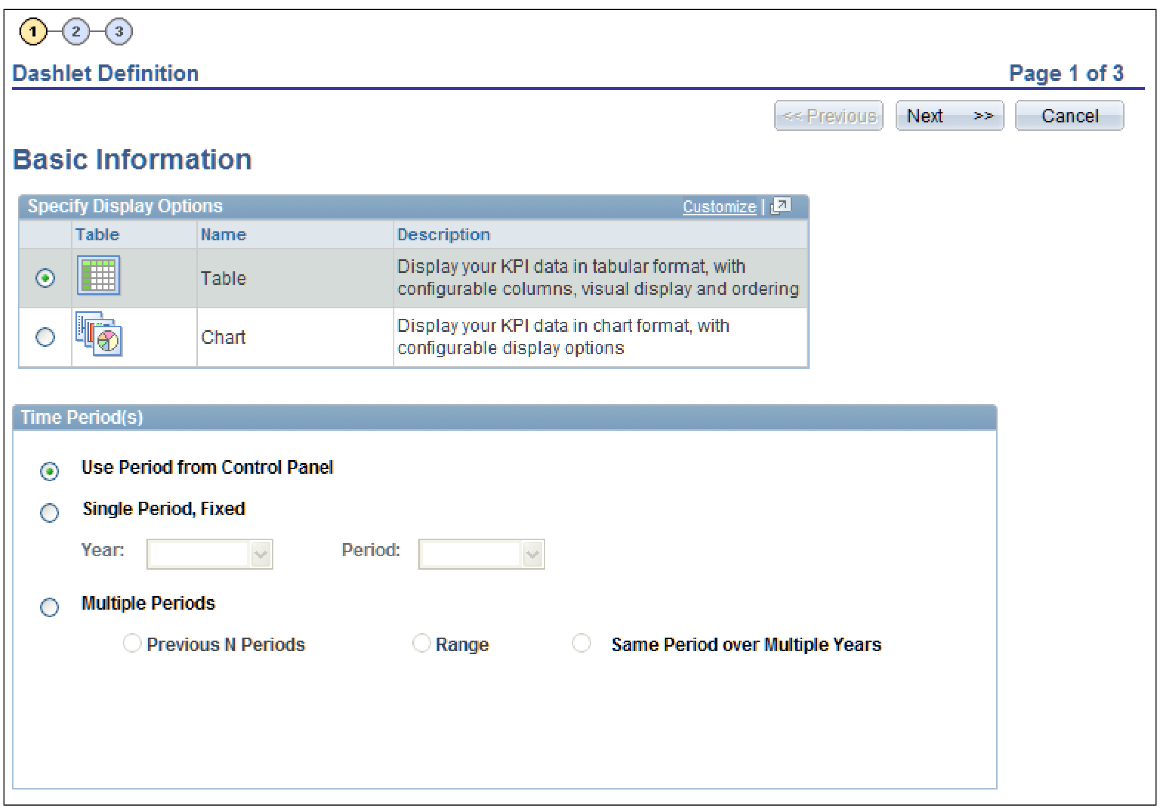
Use the Dashlet Definition - Basic Information page (KP_DLET_WIZARD_1) to specify dashlet format and time period.

Navigation

On the KPI Dashboard page, click the Configure Dashlet button.

Image: Dashlet Definition - Basic Information page

This example illustrates the fields and controls on the Dashlet Definition - Basic Information page. You can find definitions for the fields and controls later on this page.



Specify Display Options

Table	Select to configure a dashlet that displays information using a grid.
Chart	Select to configure a dashlet that displays information using a chart.

Time Period(s)

Specify the time period for which to display KPI data.

Use Period from Control Panel	Select to view KPI data from the fiscal year and period that is specified in the control panel of the KPI Dashboard page.
Single Period, Fixed	Select to view KPI data from a specific period. If you select this option, you must also complete the Year and Period fields. The drop-down lists for year and period include values for which KPI assessments have been generated.
Multiple Periods	Select to view KPI data from several periods. Then select one of the following options to indicate which periods to view: Previous N Periods: Select to view one or more prior periods. Specify how many prior periods by entering a value in the Number of Periods (N) field. Range: Select to view data from periods within a specific date range. Specify the date range by selecting values for the Starting Year and Period and for the Ending Year and Period. Same Period over Multiple Years: Select to view data from the same period over several years. Specify the period and years by selecting values for the Starting Year, Period, and End Fiscal Year fields.

Dashlet Definition - Data Page

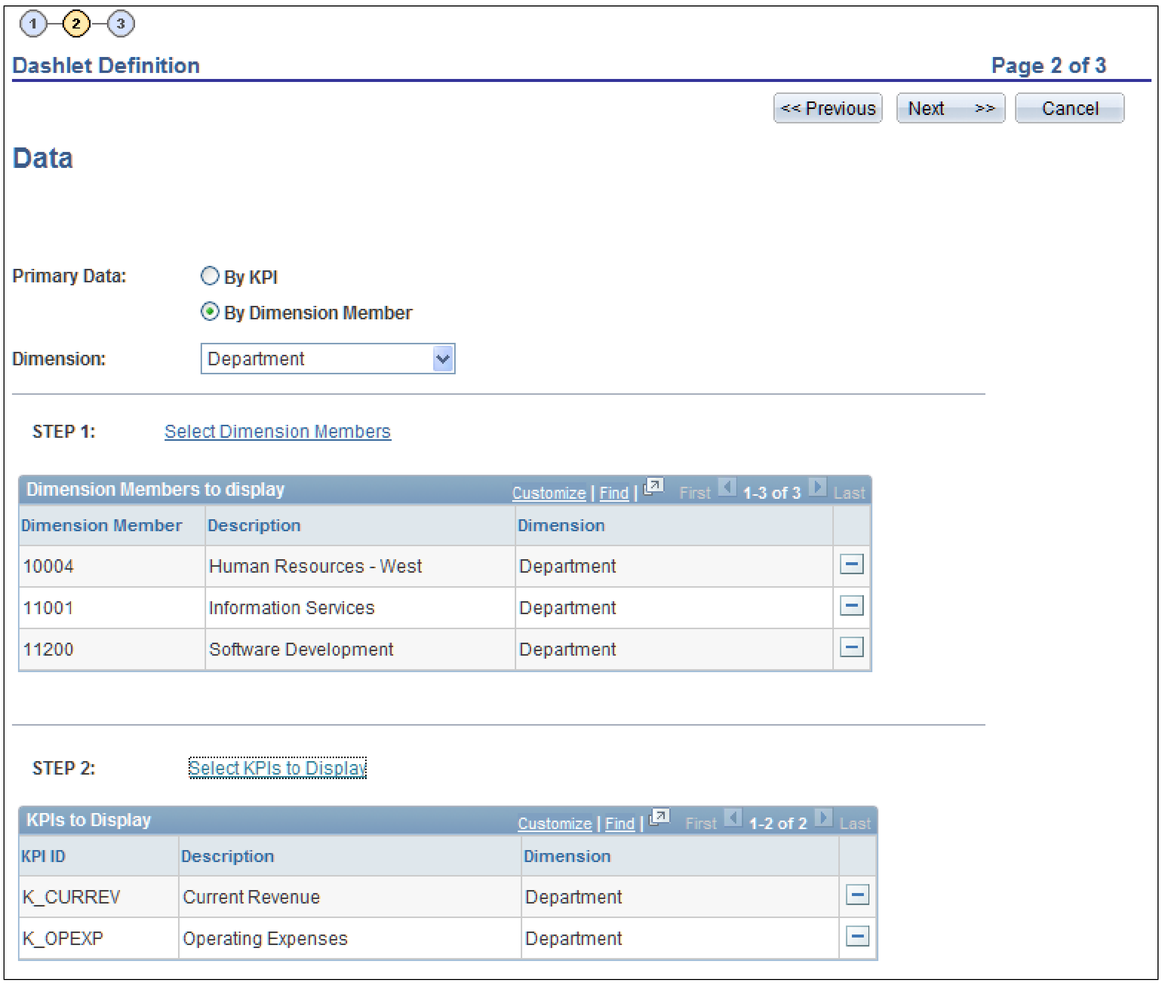
Use the Dashlet Definition - Data page (KP_DLET_WIZARD_2) to define the KPI data to use for a dashlet.

Navigation

- On the Dashlet Definition - Basic Information page, click Next or 2.
- Click the number 2 from any of the other pages in the KPI Dashboard Wizard.

Image: Dashlet Definition - Data page

This example illustrates the fields and controls on the Dashlet Definition - Data page. You can find definitions for the fields and controls later on this page.



Primary Data

Specify the primary criteria for defining the data to use for your dashlet. Options are:

By KPI: Select to use one or more specific KPIs as your main source of data.

By Dimension Member: Select to use one or more dimension members as your main source of data.

The underlying data for either option is the same, as in both cases you select KPIs and dimension members from a single dimension. The difference is the order in which you make your selections. If the primary data is by KPI, then in step 1 you specify the KPIs, and in step 2 the dimension members. If the primary data is by dimension member, then in step 1 you specify the dimension members, and in step 2 the KPIs. For example, if you want see the "Profitability by Customer" KPI for all your customers you would select primary data by KPI. On the other hand if you are responsible for a region and want to view all the KPIs for your region you would pick primary data by dimension member.

Dimension

Select the dimension to use. This field limits subsequent selections for KPIs to those that are based on only this dimension.

Step 1

If the primary data is by KPI, the KPIs to Display grid appears in this section of the page. It lists the KPIs that are included. Click Select KPIs to Display to access the Choose KPIs page, where you can select which KPIs to use.

If the primary data is by dimension member, the Dimension Members to display grid appears in this section of the page. It lists the dimension members that are included. Click Select Dimension Members to access the Choose KPI Dimension Members page, where you can select which dimension members to use.

Step 2

If the primary data is by KPI, the Dimension Members to display grid appears in this section of the page. It lists the dimension members that are included. Click Select Dimension Members to access the Choose KPI Dimension Members page, where you can select which dimension members to use.

If the primary data is by dimension member, the KPIs to Display grid appears in this section of the page. It lists the KPIs that are included. Click Select KPIs to Display to access the Choose KPIs page, where you can select which KPIs to use.

Dashlet Definition - Table Details Page

Use the Dashlet Definition - Table Details page (KP_DLET_WIZARD_3) to specify table display options.

Navigation

- On the Dashlet Definition - Data page for a table-based dashlet, click Next or 3.
- Click the number 3 from any of the other pages in the KPI Dashboard Wizard.

Image: Dashlet Definition - Table Details page

This example illustrates the fields and controls on the Dashlet Definition - Table Details page. You can find definitions for the fields and controls later on this page.

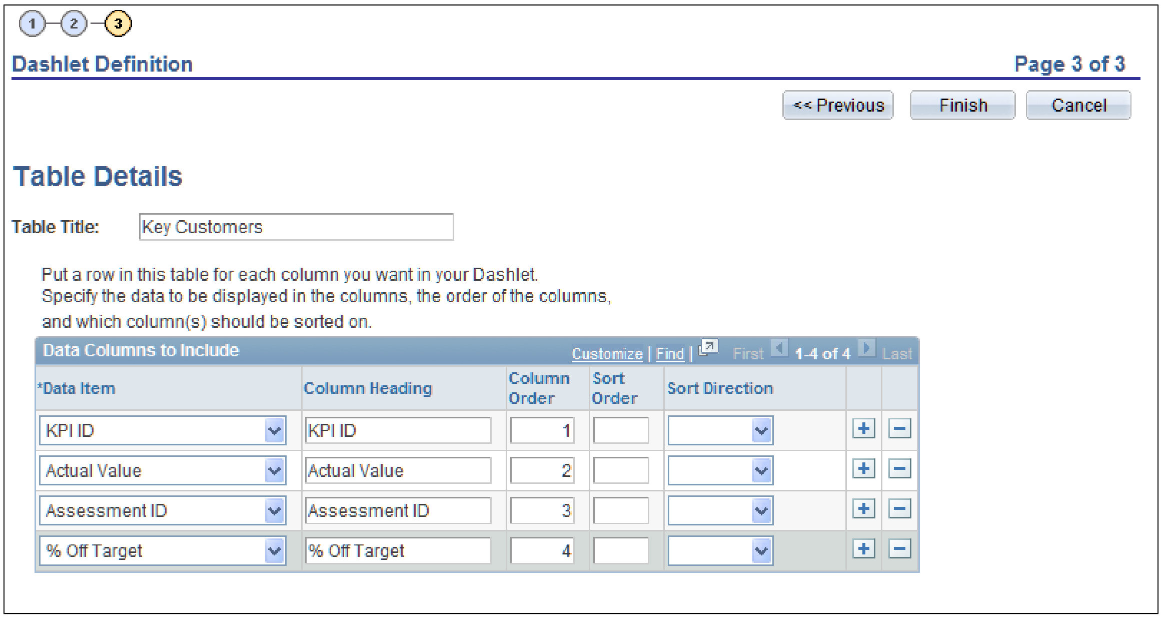


Table Title

Enter the text to use for the table.

Data Columns to Include

Insert rows as needed and complete the fields within this grid to define the columns and layout for the table.

Data Item

Select the data to use for the column.

Column Heading

Displays the title that is used for the column. This field automatically contains the description of the data item, but you can override it by entering your own text for the title.

Column Order

Enter a value to control the order of each column. The system populates this field automatically when you add a row, but you can override it.

Sort Order

Optionally, enter a numeric value to sort the column. The column with the lowest sort order is used as the primary sort; any additional sorts are done based on the ascending value of their sort order.

Sort Direction

For each column that is sorted, select whether to sort the data in that column in ascending or descending order.

Dashlet Definition - Chart Details Page

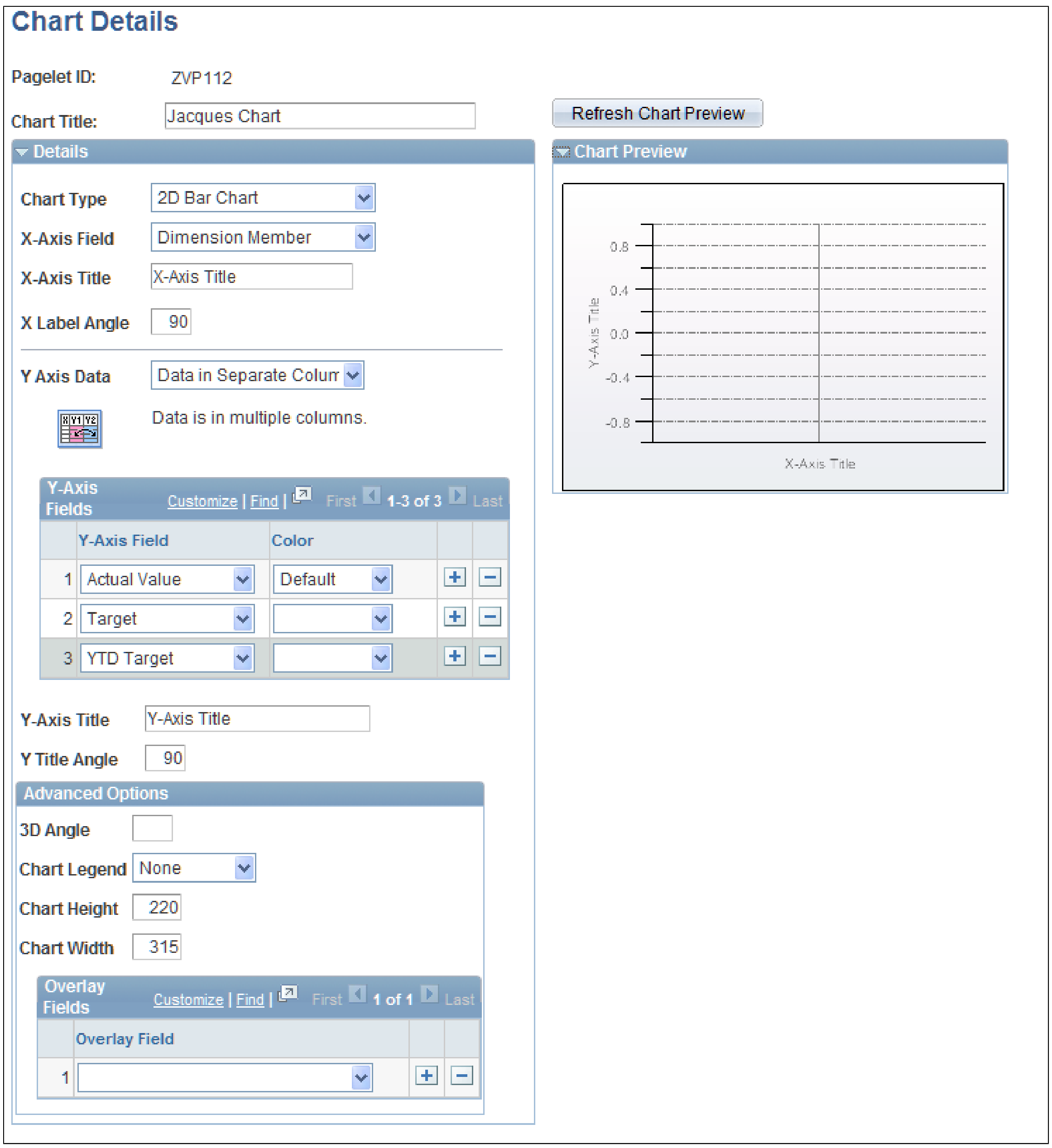
Use the Dashlet Definition - Chart Details page (KP_DLET_WIZARD_3C) to specify chart display options.

Navigation

- On the Dashlet Definition - Data page for a chart-based dashlet, click Next or 3.
- Click the number 3 from any of the other pages in the KPI Dashboard Wizard.

Image: Dashlet Definition - Chart Details page

This example illustrates the fields and controls on the Dashlet Definition - Chart Details page. You can find definitions for the fields and controls later on this page.



To generate a chart pagelet using Pagelet Wizard, you include information that is related to the chart's *x* axis and *y* axis. The *y* axis is the axis that contains the KPI data. In most charts, the *y* axis is the vertical axis. However, in a horizontal bar chart, the *y* axis is the horizontal axis. The *x* axis is the axis against which the *y*-axis data is measured.

Chart Options

Chart Type

Select the type of chart to use to display the KPI data on the dashlet. Available chart formats are those supported by the PeopleCode Chart class.

See *PeopleTools: PeopleCode API Reference*"Chart Class," Understanding the Chart Class

X-Axis Field

Select the KPI data field from which to derive x-axis values for the chart.

X-Axis Title

Enter the text to use as a title for the x-axis.

X Label Angle

Enter the angle at which you want the text of the x-axis labels to appear along the x-axis on the dashlet.

Y Axis Data

Data in Separate Columns: Select to explicitly specify the columns that are used to group the graph data. When you select this option, you must also complete the Y-Axis Fields grid.

Data in Rows: Select to group the graph data by the KPI specified in the KPI ID field on the Dashlet Definition - Data page. When you select this option the Y axis field value is displayed for distinct values of the Y series field in groups for each X-axis field member.

Note: When you use the *Data in Rows* option you don't have a choice over the color of the bar; the system automatically uses the assessment color for that KPI and dimension member. When you use the *Data in Separate Columns* option, you can override the default assessment color to any color that you prefer.

Y-Axis Fields

Select the KPI data fields that you want to use to derive y-axis values for the chart.

If you set the Y Axis Data field to *Data in Separate Columns,* you can select up to four y-axis fields to create a chart that displays data for multiple fields. For example, if you track sales figures for several departments over multiple years, you can assign each department its own *y*-axis value.

Color

Select the color for the *y*-axis data. If you select multiple y-axis fields, selecting a different color for each field improves usability. This option is available only if the y-axis data is in stored columns.

Y Series

This field is available if the Y Axis Data field is set to *Data in Rows.* Select the field to use to generate a color-coded series of *y*-axis data. Colors are automatically assigned, but you can override them by supplying custom XSL.

Y-Axis Title

Enter the text to use as a title for the y-axis.

Y Label Angle

Enter the angle at which you want the text of the y-axis labels to appear along the y-axis on the dashlet.

Advanced Options

3D Angle

If you select a 3D chart type, enter the angle at which you want the 3D data to be displayed.

Chart Legend

Select the area of the pagelet where the chart legend appears. Options are:

- *Bottom*
- *Left*
- *None*
- *Right*
- *Top*

Chart Height

Enter the height of the chart in pixels.

Chart Width

Enter the width of the chart in pixels.

If you do not enter height or width values, the chart is automatically sized based on the pagelet position and size (narrow or wide).

Overlay Fields

Select up to three fields for which you want to display data using a line drawn over the background chart. Overlays apply to all chart types except 2D and 3D pie charts.

Pagelet Preview

This collapsible group box displays a preview of the pagelet using the most recently saved display option settings on this page.

Refresh Chart Preview

If you've changed any chart parameters, click to refresh the preview chart using the new values.

Chapter 8

Using Customer Scorecard

Understanding Customer Scorecard

Today, businesses measure their success based on several KPIs. A *scorecard* is an enterprise tool for the evaluation and communication of strategic objectives and these KPIs. The Customer Scorecard can be a component of a larger company-wide scorecard that facilitates the measurement and communication of customer satisfaction and profitability objectives across the enterprise. Following the basic tenets of Balanced Scorecard theory, use KPIs within the Customer Scorecard to:

- Evaluate how well marketing, sales, and customer support employees carry out the internal initiatives that are necessary to serve your customers.
- Assess how those initiatives are associated with your financial and strategic goals.
- Link marketing, customer support, and sales KPIs to corporate-wide objectives using a Scorecard approach.
- Quickly compare current company practices with internal historical measures and external benchmarks.
- Measure and align marketing, sales, and support staff initiatives within a business framework.
- Enable easy access to information by distributing reporting results over the internet.

Used in this manner as a communications tool, Customer Scorecard supports the shift of the marketing, sales, and support staff from administrative entities to developers of key strategic relationships with customers.

This section discusses:

- Integrations
- Scorecards and strategy components
- Key performance indicators
- Batch processes

Integrations

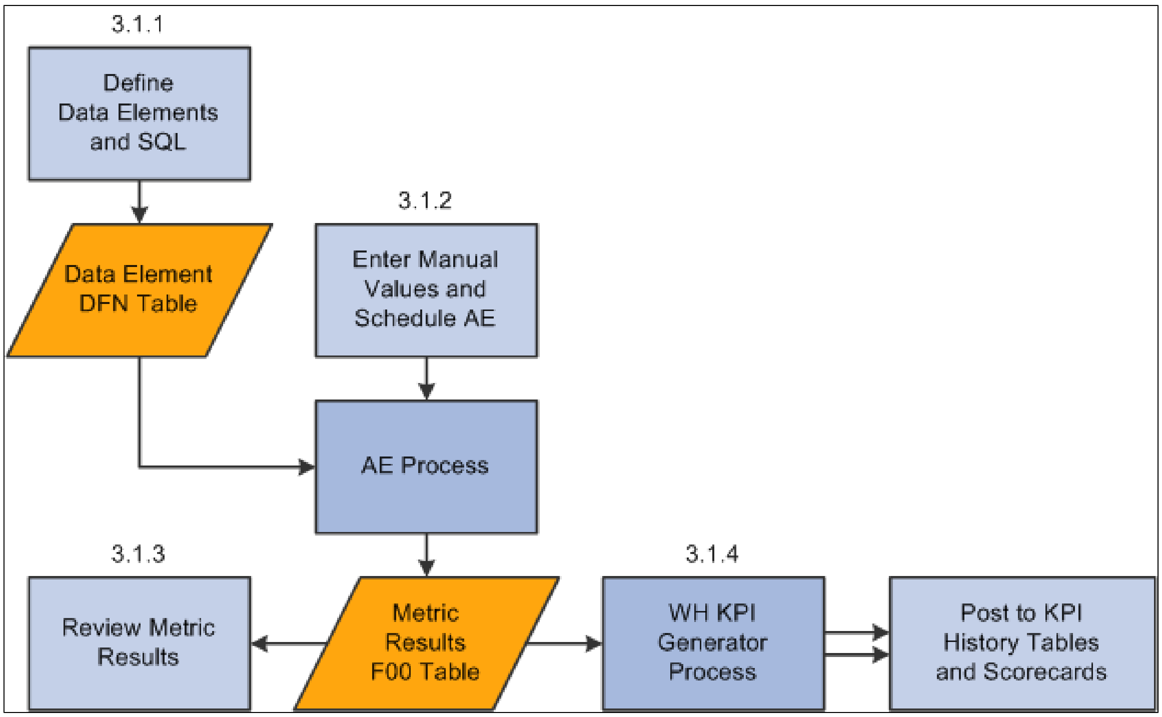
Customer Scorecard is part of the Customer Lifecycle Marketing business process.

Customer Scorecard works in conjunction with Enterprise Scorecard to provide a current representation of how the company is meeting its customer-centric objectives. Data flows through Enterprise Scorecard based on a defined frequency. Transactional data is provided to PeopleSoft EPM, where it is transformed using the Scorecard analysis tools. The system displays analysis results to users who can use this information to analyze trends or take actions as necessary. You access the analysis results by using the company intranet or business home page.

The following diagram illustrates the data flow from Customer Scorecard through the PeopleSoft Customer Relationship Management Data Mart, with final results accessed through the reporting solution:

Image: Data flow from KPI detail to the PeopleSoft Customer Relationship Management Data Mart

Data flow from KPI detail to the PeopleSoft Customer Relationship Management Data Mart



Scorecards and Strategy Components

The Customer Scorecard is a view of your company's customer satisfaction, marketing and sales objectives, and performance. The scorecard's foundation is a strategy tree that comprises hierarchical nodes of strategy components.

Strategy components are the elements that make up your strategy, and are the nodes on your strategy tree or tables. Vision, strategic thrusts, and critical success factors are all strategy components, and represent your organization's goals. KPIs, which measure how well an organization is achieving those goals, are attached to scorecard strategy components, which are typically critical success factors.

The predefined data components that make up the Customer Scorecard are delivered separately from the Scorecard application. These components are delivered at the time of installation. After the database is installed at your site, setting up and accessing the Customer Scorecard involves setting up and populating PeopleSoft EPM warehouse tables, updating several components of the scorecard, and populating the final reporting tables.

Note: Before you attempt to set up the Customer Scorecard, you should have installed the appropriate components using the installation documentation and moved the appropriate data components to your system database.

The predefined data components, as delivered, are set up to run with a specific business unit, SetID, model ID, scenario ID, and so on. All of the appropriate security and object IDs are delivered as sample data. If you install the Customer Scorecard to a demo database, you can acquaint yourself with the functionality in a demo environment. Using the delivered scorecard is optional, and you can modify it to suit your implementation. You can use the KPI Data Migration Utility to customize content for the delivered scorecards.

The following table lists the field values used by this scorecard:

Scorecard ID	CR_SCORECARD
SetID	SHARE
Business Unit	CORP1
Strategy Tree	CR_STRATEGY
KPI Trees	CR_AGENT_UTIL
	CR_AVG_DISCOUNT
	CR_AVG_PRODUCTS
	CR_CONVERSION_RATE
	CR_CUST_ACQ
	CR_CUST_DEFECTION
	CR_EMP_FILL
	CR_ONTIME_DELIVERY
	CR_PROD_FAIL
	CR_QUOTA_ATTAIN
	CR_REPEAT_CUST
	CR_ROI

KPIs

KPIs define the data value or calculation that is evaluated to determine how well your organization is meeting its critical success factors.

Customer Scorecard delivers a set of preconfigured KPIs that provide executive and middle management with the tools to analyze marketing, sales, and customer support activities, and compare them with business objectives. These KPIs have been developed in conjunction with leading consultants, and are linked to a set of critical success factors to answer questions such as:

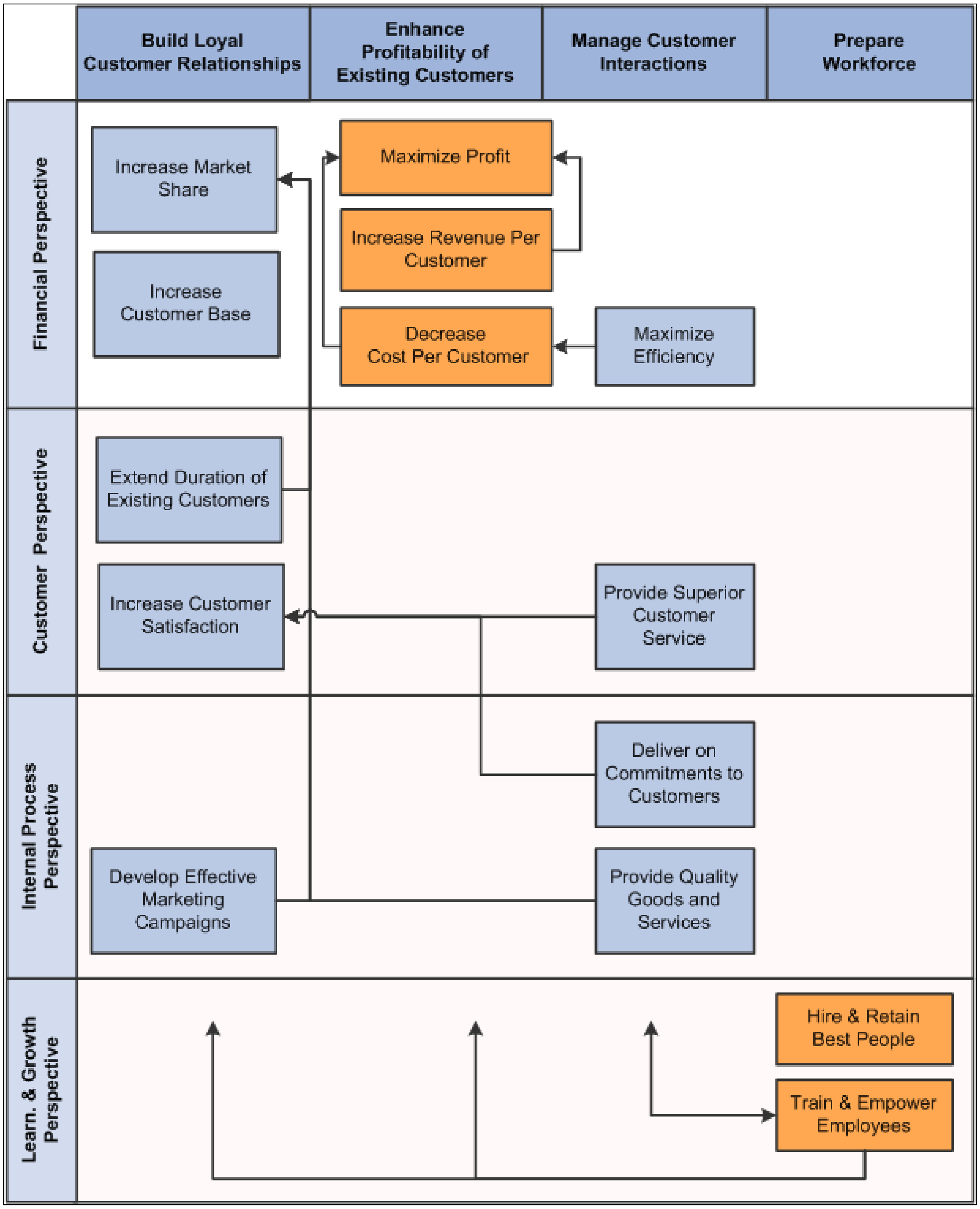
- What was the success of the campaign in generating leads?
- Is the campaign within budget?

- What is the customer satisfaction level with service received?
- What products are generating a lot of cases?
- How long does the sale process take?
- What products and channels are customers using?

The following diagram is an example of critical success factors for a customer scorecard:

Image: Critical success factors within a customer scorecardcritical success factors (CSFs)customer scorecard

Critical success factors within a customer scorecardcritical success factors (CSFs)customer scorecard



Using the predefined KPIs as a baseline, the marketing, sales, and customer support staff, as well as company management, can view company performance for these critical success factors by perspective type. Easy and timely access to this information allows management to track progress toward company goals and to take immediate action when necessary.

Batch Processes

You must run the following jobstreams to populate key tables:

- KP_ANALYZE

  This jobstream populates KP_KPI_CALC_F00 and KP_KPI_ASMT_F00. Run this jobstream to validate the KPI calculation rules, verify end values, and test the KPI assessment rules.

- BC_ANALYZE

  This jobstream populates KP_KPI_CALC_F00, KP_KPI_ASMT_F00, and BC_ASSESS_F00. Run this jobstream to generate the final scorecard assessments after you validate your setup (by running KP_ANALYZE). If you set up this job to run regularly, the KPI process can aggregate data month-to-month and year-to-date. You must run this process after you populate or update the warehouse tables (such as during the Extract, Transform, and Load process) to view current results for your customer scorecard.

Related Links

Understanding KPI and Scorecard Processing

Customer Scorecard Summary

The following table contains summary information for the KPIs that make up the Customer Scorecard. In addition to the KPI description and related critical success factor, this summary table includes the dimension or object type, perspective type, and KPI calculation definition.

Note: The following is not a complete list of all the KPIs delivered with the Customer Scorecard, but only of the KPIs related to critical success factors. Fifty-six predefined KPIs are delivered with the Customer Scorecard; some KPIs measure Customer Relationship Management activities, while others measure operations that drive the CRM activities.

Critical Success Factor	***KPI Name***	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
Increase Revenue/ Customer.	Revenue by Customer	Customer Master List	Financial	Total Revenue grouped by Customer.
Maximize Profit.	Profitability by Customer	Customer Master List	Financial	Total Revenue – Total Expense, by Customer. Data is accessed from PF_LEDGER_F00, that is, ABM/Data Manager.
Maximize Profit.	Profitability by Product	Product	Financial	Total Revenue – Total Expense by Product. Data is accessed from PF_LEDGER_F00, that is, ABM/Data Manager.

Critical Success Factor	***KPI Name***	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
Maximize Profit.	Profitability by Channel	Channel	Financial	Total Revenue – Total Expense, by Channel. Data is accessed from PF_LEDGER_F00, that is, ABM/Data Manager.
Maximize Profit.	Average Deal Value	Customer Master List	Financial	Total deal volume divided by number of orders, by customer.
Increase Revenue/ Customer.	Average Discount	Product	Financial	Total Discounts divided by total deal volume, by customer.
Decrease Cost/ Customer.	Cost to Support by Customer	Customer Master List	Financial	Activity Based Management Costs by Customer.
Decrease Cost/ Customer.	Cost to Support by Product	Product	Financial	Activity Based Management Costs by Product.
Increase Market Share.	Market Share	Product	Financial	Manual KPI. Market Share by Product.
Increase Effectiveness of Internal Processes.	Days Sales Outstanding	Business Unit	Financial	Trade Accounts Receivable / (Revenue / # Days in a Period), by business unit.
Increase Customer Base.	Pipeline Revenue	Territory	Financial	Absolute pipeline by territory.
Increase Customer Satisfaction.	Customer Satisfaction	Business Unit	Customer	Average Survey Score by business unit. This is based on support surveys.
Increase Customer Base.	Customer Acquisition Rate	Business Unit	Customer	(# New Customers Current – # New Customer Prior) / # New Customers Prior, by business unit.
Extend Duration of Existing Customers.	Repeat Customer Rate	Business Unit	Customer	# Repeat Customers / Total # of Customers, by business unit.
Extend Duration of Existing Customers.	Customer Value	Customer Master List	Customer	Composite of customer value scores.
Increase Revenue/ Customer.	Average Number of Products per Order	Customer Master List	Internal Process	Total # of Products / Total # of Orders, by Customer.

Critical Success Factor	***KPI Name***	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
Deliver on Commitments to Customer.	Average Time to Fulfill Orders	Customer Master List	Customer	AVG (Schedule Arrival Time – Order Date), by Customer.
Deliver on Commitments to Customer.	On Time Delivery	Business Unit	Customer	# On Time or Early Orders / Total Orders, by business unit.
Increase Customer Base.	Lead Response Rate	Campaign	Internal Process	# of Accepts / List Size by Campaign.
Develop Effective Marketing Campaigns.	Conversion Rate	Campaign	Internal Process	# Opportunities Won / # of Leads, by Campaign.
Develop Effective Marketing Campaigns.	Average ROI	Campaign	Internal Process	(Revenue - Marketing Costs) / Revenue, by Campaign.
Provide Superior Customer Service.	Average Time to Close Case	Product	Internal Process	AVG (Resolution Date – Creation Date), by Product.
Provide Superior Customer Service.	Rolling Average No. of Cases	Support Organization	Internal Process	(# of Cases Current Period + # of Cases Prior Period + # of Cases 2 Periods Ago) / 3, by Support Organization.
Hire and Retain Best People.	Employee Fill Ratio	Department	Internal Process	Manual KPI
Hire and Retain Best People.	Sales Reps Achieving Quota	Business Unit	Learning & Growth	Manual KPI
Train and Empower Employees.	Sales Training Completed	Business Unit	Learning & Growth	# of Sales Employees Completed Training / Total Sales Force, by business unit.
Train and Empower Employees.	Support Training Completed	Support Organization	Learning & Growth	# of Support Employees Completed Training / Total Support Force, by Support Organization.
Increase Effectiveness of Internal Processes.	Lost Business	Sales Territory	Financial	Sum of estimated revenue over all closed-lost opportunities, by sales territory.
Increase Effectiveness of Internal Processes.	Revenue by Channel	Channel	Financial	Total revenue for the period, by channel.

Delivered KPIs

Details about the delivered KPIs are provided in the CRMKPIS.PDF file that is located in the documentation. This file provides information on each of the delivered predefined KPIs by means of summary and detail tables. Use these tables to better understand Customer Scorecard calculations. You can also use the information in these tables as a basis for altering the scorecard to update KPIs and target rules.

Prerequisites

Load the predefined data components that are required for Customer Scorecard by running a DMS script when you install the application. For detailed installation information, access My Oracle Support and view the *PeopleSoft EPM Installation* product documentation.

Setting Up and Using Customer Scorecard

To use Customer Scorecard:

1. Set up PeopleSoft EPM components, including but not limited to:
    - Business rules.
    - General options.
    - Calendars.
    - Security.
    - Performance and general ledger business units.
    - Trees.
    - Ledgers, templates, and the ledger mapper.
    - Models and scenarios.
    - Filters and constraints.
    - Datamaps and tablemaps.
2. Run the ETL (Extract, Transform, and Load) process.

    This process populates the PeopleSoft EPM warehouse tables with the data that is related to the PeopleSoft Customer Relationship Management application, general financial information, purchase order information, and the Customer Scorecard.
3. Load data for manual KPIs, and enter KPI values manually, where needed.
4. Set up Scorecard, including but not limited to:

- Adding KPI dimension members.
- Adding KPI data elements.
- Adding KPI calculations and calculation rules.
- Adding KPI target rules.
- Updating the scorecard owner.
- Updating Enterprise Performance Management row-level security tables.

5. Run the KP_ANALYZE and BC_ANALYZE processes to populate key tables.
6. View scorecards.

See also “Setting Up the Operational Warehouse - Enriched for EPM Analytical Applications” in the Enterprise Performance Management Fundamentals documentation "Understanding Metadata *(PeopleSoft 9.1: Enterprise Performance Management Fundamentals)*".

Chapter 9

Using Workforce Scorecard

Understanding Workforce Scorecard

The Workforce Scorecard is a component of a larger company-wide scorecard that facilitates the measurement and communication of human resources objectives and performance across the enterprise. Following the basic tenets of scorecard theory, KPIs within the Workforce Scorecard are used to evaluate how well employees are carrying out the internal initiatives necessary to serve their customers, how those initiatives are associated with the financial and strategic goals of the organization, and how efficiently and effectively all employees in the organization are performing. Used in this manner as an organizational and communications tool, the Workforce Scorecard supports the shift of the human resources function from an administrative entity to a key strategic partner.

Some benefits of using the Workforce Scorecard are:

- Linking human resources KPIs to corporate-wide objectives using an Enterprise Scorecard approach.
- Quickly comparing current company practices to internal historical measures and external benchmarks.
- Measuring and aligning your human resource initiatives within a business framework.
- Accurately determining and tracking the composition and deployment of the workforce.
- Enabling easy access to information by distributing reporting results through the internet.

This topic discusses:

- Integrations
- Scorecards and strategy components
- Key Performance Indicators
- Batch processes

Integrations

The Workforce Scorecard is part of the Recruiting, Development, Deployment, and Reward business processes.

The Workforce Scorecard works in conjunction with Scorecard and the Workforce Data Mart. The Workforce Scorecard uses Scorecard's tools to provide a current representation of how the company is meeting its human resources objectives. The Workforce Data Mart provides details and analysis of how and why these trends are occurring.

Data flows through the Scorecard application based on a defined frequency. Transactional data is provided to PeopleSoft EPM where it is transformed using the Scorecard analysis tools. The system displays analysis results through the Workforce Data Mart to users who can use this information to analyze trends or take actions as necessary. For example, you can analyze details such as job demographics, personal demographics, and compensation.

Related Links

"Understanding the Workforce Rewards Data Mart *(PeopleSoft 9.1: Workforce Rewards)*"

Scorecards and Strategy Components

The Workforce Scorecard is a view of your company's human resource objectives and performance. The scorecard's foundation is a strategy tree that is comprised of hierarchical nodes of strategy components.

Strategy components are the elements that make up your strategy, and are the nodes on your strategy tree or tables. Vision, strategic thrusts, and critical success factors are all strategy components, and represent the goals that your organization is trying to achieve. KPIs, which measure how well an organization is achieving those goals, are attached to scorecard strategy components, which are typically critical success factors.

The predefined data components that make up the Workforce Scorecard are delivered separately from the Scorecard application. These components are delivered at the time of installation. After the database is installed at your site, setting up and accessing the Workforce Scorecard involves setting up and populating PeopleSoft EPM, updating several components of the scorecard, and populating the final reporting tables.

Note: Before you attempt to set up the Workforce Scorecard, you should have installed the appropriate components using the installation documentation and moved the appropriate data components to your system database.

The predefined data components, as delivered, are set up to run with a specific business unit, SetID, model ID, scenario ID, and so on. All of the appropriate security and object IDs are delivered as sample data. If you install the Workforce Scorecard to a demo database, you can acquaint yourself with the functionality in a demo environment. Using the delivered scorecard is optional, and you can modify it to suit your implementation.

This table lists the field values for this scorecard:

Scorecard ID	BSC_HRSCORECARD
SetID	SHARE
Business Unit	CORP1
Scenario ID	ACTUAL02
Model	PRODH
Strategy Tree	WS_SCORECARD
Strategy Components	HR_CSF1 (organizational effectiveness)
	HR_CSF2 (compliance)
	HR_CSF2A (gender composition)
	HR_CSF2B (age composition)

	HR_CSF2C (ethnicity composition) HR_CSF3 (staffing) HR_CSF4 (separation) HR_CSF5 (HR readiness) HR_CSF50 (expenses) HR_CSF51 (health and safety) HR_CSF52 (training) HR_CSF53 (compensation) HR_CSF6 (competencies) HR_CSF6A (competency inventory profile) HR_CSF6B (competency investment factor) HR_CSF7 (employee satisfaction) HR_ST1 (HR ST by BU dimension) HR_ST2 (HR ST by department dimension) HR_VISION (corporate vision for HR BSC)
KPI Trees	AGE_COMPOSITION, COMPENSATION, ETHNICITY, GENDER_COMPOSITION, SEPARATION, TOTAL_EXPENSE

KPIs

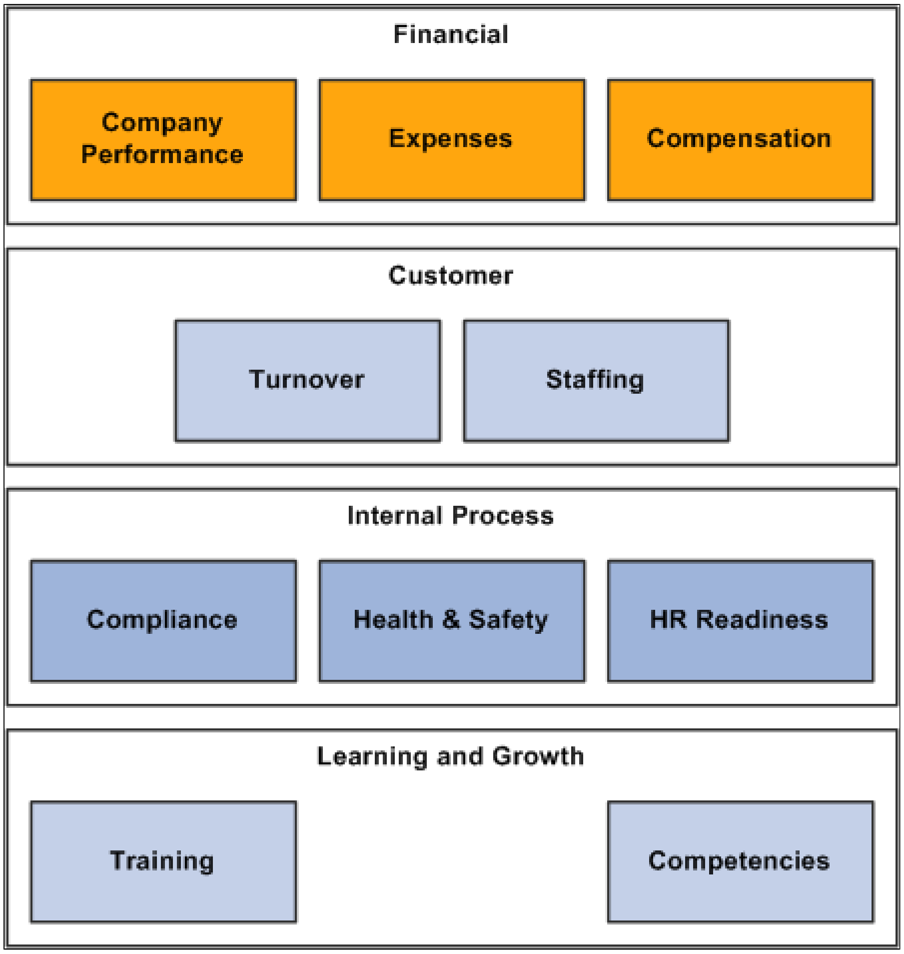
KPIs define the data value or calculation, from the PeopleSoft EPM warehouse tables, that is used to determine how well your organization is meeting its critical success factors.

The Workforce Scorecard delivers a set of predefined KPIs that provide executive and middle management with a representation of human resources-related activity. These predefined KPIs have been developed in conjunction with leading human resource and management consultants. The KPIs are linked to a set of critical success factors that cover all facets of human resources activities.

The following illustration is an example of critical success factors for a workforce scorecard:

Image: Workforce Scorecard critical success factors

Workforce Scorecard critical success factors



Using the predefined KPIs as a baseline, human resources and company management can view company performance for these critical success factors by business unit or department. Easy and timely access to this information enables management to track progress toward company goals and to take immediate action when necessary.

Batch Processes

You must run the following jobstreams to populate key tables:

- KP_ANALYZE

  This jobstream populates KP_KPI_CALC_F00 and KP_KPI_ASMT_F00. Run this jobstream to validate the KPI calculation rules, verify end values, and test the KPI assessment rules.

- BC_ANALYZE

  This jobstream populates KP_KPI_CALC_F00, KP_KPI_ASMT_F00 and BC_ASSESS_F00. Run this jobstream to generate the final scorecard assessments after you validate your setup (by running KP_ANALYZE). If you set up this job to run regularly, the KPI process can aggregate data month-to-month and year-to-date. You must run this process after you populate or update the PeopleSoft EPM warehouse tables (such as during the ETL process) to view current results for your Workforce Scorecard.

Related Links

Understanding KPI and Scorecard Processing

Workforce Scorecard Summary

The following table contains summary information for the 31 KPIs or categories of KPIs in the Workforce Scorecard that are related to critical success factors.

Note: This table is not an exhaustive list of all the KPIs delivered with the Workforce Scorecard, but only those relating to the Critical Success Factors. A total of 80 predefined KPIs are delivered with the Workforce Scorecard. Some are tied to critical success factors, others are specified as scorecard-related KPIs, and others are used to calculate other KPIs. Be aware that the Competency Inventory Profile is counted as two KPIs because two KPIs are actually defined in the metadata.

Critical Success Factor	***KPI Description***	***Dimension (Object Type)***	***Perspective***	***KPI Calculation Definition***
Organizational Effectiveness	Revenue Factor	Business Unit	Financial	Total Revenue / Total FTEs
Organizational Effectiveness	Expense Factor	Business Unit	Financial	Total Expenses / Total FTEs
Organizational Effectiveness	Income Factor	Business Unit	Financial	Total Income / Total FTEs
Compliance	Gender Composition Ratios	Business Unit	Internal Processes	Gender / Total Headcount
Compliance	Age Composition Ratios	Business Unit	Internal Processes	Age / Total Headcount
Compliance	Ethnicity Composition Ratios	Business Unit	Internal Processes	Ethnicity / Total Headcount
Expenses	Total Compensation Revenue Ratio	Department	Financial	Total Compensation Expenses / Total Revenue
Expenses	Total Compensation Expenses Ratio	Department	Financial	Total Compensation Expenses / Total Expenses
Expenses	Employee Compensation Factor	Department	Financial	Total Compensation Expenses / Total Headcount

Critical Success Factor	***KPI Description***	***Dimension (Object Type)***	***Perspective***	***KPI Calculation Definition***
Staffing	Time to Fill Factor	Business Unit	Customer	Total Time to Fill / Total Hires
Staffing	Total Accession Ratio	Business Unit	Customer	Total Hires / Total Headcount
Staffing	Service Factor	Business Unit	Customer	Length of Service / Total Headcount
Separation	Total Separation Ratio	Business Unit	Customer	Total Separations / Total Headcount
Separation	Voluntary Separation Ratio	Business Unit	Customer	Total Voluntary Separations / Total Headcount
Separation	Separation by High Performers	Business Unit	Customer	Separations where performance rating is high
Health and safety	Workers' Compensation Expenses Ratio	Department	Internal Processes	Total Workers' Compensation Expenses / Total Expenses
HR Readiness	HR FTE Ratio	Business Unit	Internal Processes	Total FTEs / Total HR FTEs
HR Readiness	HR Headcount Investment Factor	Business Unit	Internal Processes	Total HR Expenses / Total Headcount
HR Readiness	HR Expenses Ratio	Business Unit	Internal Processes	Total HR Expenses / Total Expenses
Training	Training Cost Factor	Department	Learning & Growth	Total Training Expenses / Total Trained Headcount
Training	Training Cost Ratio	Department	Learning & Growth	Total Training Expenses / Total Expenses
Training	Training Inventory Profile	Department	Learning & Growth	# Trained / Individual Training Course
Competencies	Competency Inventory Profile	Business Unit	Learning & Growth	# Skilled / Individual Competency
Compensation	Direct Compensation Ratio	Department	Financial	Total Direct Compensation Value / Total Compensation Value

Critical Success Factor	***KPI Description***	***Dimension (Object Type)***	***Perspective***	***KPI Calculation Definition***
Compensation	Cash Compensation Ratio	Department	Financial	Total Cash Compensation Value / Total Compensation Value
Compensation	Benefits Compensation Ratio	Department	Financial	Total Benefits Value / Total Compensation Value
Compensation	STI Compensation Ratio	Department	Financial	Total STI Value / Total Compensation Value
Compensation	Base Compensation Ratio	Department	Financial	Total Base Compensation Value / Total Compensation Value
Compensation	Compa-Ratio	Department	Financial	Average (Base Compensation / Grade Midpoint)
Compensation	Gap to Market Variance	Department	Financial	Average (Base Currency Amount − Survey Base Currency Amount) / Survey Base Currency Amount
Employee Satisfaction	Employee Lost Time Factor	Department	Internal Processes	Days Away from Work/ Headcount

Delivered KPIs

Details about the delivered KPIs are provided in the WFKPIS.PDF file that is located in the documentation. This file provides information on each of the delivered predefined KPIs via summary and detail tables. Use these tables to better understand Workforce Scorecard calculations. You can also use the information in these tables as a basis for altering the scorecard to update KPIs and target rules.

Prerequisites

Load the predefined data components that are required for Scorecard by running a DMS script when you install the application.

See *PeopleSoft EPM Installation* product documentation on the PeopleSoft My Oracle Support website.

Setting Up and Using Workforce Scorecard

To use the Workforce Scorecard:

1. Set up PeopleSoft EPM components, including but not limited to:
   - Business rules.
   - General options.
   - Calendars.
   - Security.
   - PF and GL business units.
   - Trees.
   - Ledgers, templates, and the Ledger Mapper.
   - Models and scenarios.
   - Filters and constraints.
2. Run ETL processes.

   Running the ETL processes populates the PeopleSoft EPM warehouse tables with the data needed for the Workforce Scorecard.
3. Set up Scorecard, including but not limited to:
   - Adding KPI dimension members.
   - Adding KPI target rules.
   - Updating the scorecard owner.
4. Run the KP_ANALYZE and BC_ANALYZE processes to populate key tables.
5. View scorecards using the PeopleSoft Business Interface.

See also the topics “Setting Up the Operational Warehouse - Enriched for EPM Analytical Applications” and “Setting Up EPM Infrastructure, Business Rules, and Security” in the *Enterprise Performance Management Fundamentals* documentation.

Chapter 10

Using Manufacturing Scorecard

Understanding Manufacturing Scorecard

Today, businesses measure their success based on several key performance indicators (KPIs). A scorecard is an enterprise tool for the evaluation and communication of strategic objectives and these KPIs. The Manufacturing Scorecard implements the SCOR (Supply Chain Operations Reference) model within the Scorecard framework, and enables you to effectively monitor, analyze, and respond to those measures that characterize your manufacturing supply chain performance.

Manufacturing Scorecard works in conjunction with Scorecard to provide a current representation of how your manufacturing organization is meeting its manufacturing-centric objectives. Data flows through Scorecard based on a defined frequency. Transactional data is provided to the PeopleSoft EPM warehouse tables, where it is transformed using the Scorecard analysis tools. The system displays analysis results to users who can use this information to analyze or take actions as necessary. The analysis results are accessed from the company intranet or business home page.

Manufacturing Scorecard enables the alignment of day to day management decisions with the overall corporate strategy by combining best practice key performance indicators to monitor and respond to performance changes in real time. The Manufacturing Scorecard supports the Supply Chain Council's SCOR model. The Manufacturing Scorecard comprises the following metrics:

- Measures defined by SCOR
- Supplier metrics
- Customer metrics

This topic discusses:

- Integrations
- Scorecards and strategy components
- KPIs
- Batch processes

Integrations

Manufacturing Scorecard supports the plan, source, make, deliver, and return business processes.

Manufacturing Scorecard data tables reside in PeopleSoft EPM, which serves as a data repository that can include data from other PeopleSoft applications and other legacy systems, enabling you to source the supply chain, supplier, and customer data that you need. Manufacturing Scorecard leverages the functionality of the Scorecard to manage and measure key performance indicators and communicate strategic direction and results to your organization.

Scorecards and Strategy Components

A scorecard is the visual representation of the objectives that your organization is striving to achieve. The scorecard's foundation is a strategy tree that is comprised of hierarchical nodes of strategy components. Manufacturing Scorecard delivers the Manufacturing scorecard (MFG_SCORECARD).

Strategy components are the elements that make up your strategy, and are the nodes on your strategy tree or tables. Vision, strategic thrusts, and critical success factors are all strategy components, and represent the goals that your manufacturing organization is trying to achieve. KPIs, which measure how well an organization is achieving those goals, are attached to scorecard strategy components.

The predefined data components that make up the Manufacturing Scorecard are delivered at installation. After you install the database, setting up and accessing the Manufacturing Scorecard involves setting up PeopleSoft EPM, populating the data warehouse with data, updating several components of the Scorecard, and populating the final reporting tables.

Note: Before you attempt to set up the Manufacturing Scorecard, you should have installed the appropriate components using the installation documentation and moved the appropriate data components to your system database.

The predefined data components, as delivered, are set up to run with a specific business unit, SetID, model ID, scenario ID, and so on. All of the appropriate security and object IDs are delivered as sample data. If you install the Manufacturing Scorecard to a demo database, you can acquaint yourself with the functionality in a demo environment. Using the delivered scorecard is optional, and you can modify it to suit your implementation. You can use the KPI Data Migration Utility to customize content for the delivered scorecards.

This table lists the field values for this scorecard:

Scorecard ID	MFG_SCORECARD
SetID	SHARE
Business Unit	CORP1
Scenario ID	MFG_SC
Model	MFG
Strategy Tree	MFG_STRATEGY
Strategy Components	The strategy components for the operating strategy (strategic thrust) are: • MFG_SCOR_RELB — Increase reliability. • MFG_SCOR_RESP — Improve responsiveness. • MFG_SCOR_FLEX — Maximize flexibility. • MFG_SCOR_COST — Reduce supply chain costs. • MFG_SCOR_ASSET — Improve asset utilization. • MFG_SUPP_PERF — Optimize supplier performance.

- MFG_CUST__SATS — Improve customer satisfaction.
- MFG_LEAN_EFF — Improve manufacturing efficiency.
- MFG_OPR_STRATEGY — Operating Strategy.

KPIs

A KPI defines the data value or calculation from the PeopleSoft EPM warehouse tables that is evaluated to determine how well your organization is meeting its critical success factors.

Manufacturing Scorecard delivers a set of preconfigured KPIs that provides your management with the tools necessary to analyze your manufacturing operation against business objectives. These KPIs have been developed in conjunction with leading consultants and measure many factors including reliability, responsiveness, flexibility, and cost. Most of these KPIs are derived or calculated from existing PeopleSoft EPM data elements based on data from the transactional database.

In cases where data values required for generating the KPIs cannot be derived from PeopleSoft EPM warehouse tables, manual KPIs are provided. Manual KPIs require manual data input.

Manufacturing Scorecard consists of *Level 1* KPIs and *Level 2* KPIs. Level 1 KPIs are derived from level 2 KPIs. Without level 2 KPIs, level 1 KPIs cannot perform the proper calculations. This dependency is documented in the technical details of the delivered KPIs topic in each KPI table.

The KPI IDs of the delivered Manufacturing Scorecard KPIs are delivered under the *SHARE* SetID and are associated with each strategy component as described in this table:

Component ID	***Description***	***KPI List***
MFG_SCOR_RELB	Improve Reliability	MFG_SC011
MFG_SCOR_RESP	Increase Responsiveness	MFG_SC021
MFG_SCOR_FLEX	Improve Flexibility	MFG_SC031
MFG_SCOR_COST	Reduce Supply Chain Costs	MFG_SC041 MFG_SC042 MFG_DPO001 MFG_DSO001
MFG_SCOR_ASSET	Improve Asset Utilization	MFG_SC051 MFG_SC052
MFG_SRS_PERF	Monitor Supplier Performance	MFG_SR061 MFG_SR062 MFG_SR063 MFG_SR064 MFG_SR065

Component ID	*Description*	*KPI List*
MFG_CUST_SATS	Improve Customer Satisfaction	MFG_CS071 MFG_CS072 MFG_CS073 MFG_CS074
MFG_LEAN_EFF	Improve Manufacturing Efficiency	MFG_LMIDD MFG_LMIN MFG_LMIT MFG_LMNP MFG_LMOE MFG_LMP MFG_LMROI MFG_LMT MFG_LMTDD

Batch Processes

You must run the following jobstreams to populate key tables:

- KP_ANALYZE

  This jobstream populates KP_KPI_CALC_F00 and KP_KPI_ASMT_F00. Run this jobstream to validate the KPI calculation rules, verify end values, and test the KPI assessment rules.

- BC_ANALYZE

  This jobstream populates KP_KPI_CALC_F00, KP_KPI_ASMT_F00 and BC_ASSESS_F00. Run this jobstream to generate the final scorecard assessments after you validate your setup (by running KP_ANALYZE). If you set up this job to run regularly, the KPI process can aggregate data month-to-month and year-to-date. You must run this process after you populate or update the PeopleSoft EPM warehouse tables (such as during the Extract Transform and Load process) to view current results for your manufacturing scorecard.

Related Links

Understanding KPI and Scorecard Processing

Manufacturing Scorecard Summary

The following table contains a summary of the KPIs that are delivered with Manufacturing Scorecard. It lists the KPI description, dimension or object type, perspective type, and KPI calculation definition.

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
Total Product Revenue	Business Unit	Financial	Calculates the total revenue of all products sold .
Inventory Cost	Business Unit	Internal	Total of all inventory costs.
Supply Chain Cost	Business Unit	Internal	sum of all supply chain related costs / (total product revenue – total product profit)
Supply Chain Adaptation Time	Business Unit	Internal	# days to identify environmental change & devise response + # days to achieve supply of material for new demand level + days to achieve sustained production rate for new demand level + # days to achieve sustained delivery rate at required service levels
Return on Supply Chain Assets	Business Unit	Internal	Supply Chain Revenue Contribution / Supply Chain Fixed Asset Value
Perfect Order Fulfillment	Business Unit	Internal	[total orders shipped on time and in full - orders with faulty documentation - orders with shipping damage] / [total orders]
Order Fulfillment Lead Time (average)	Business Unit	Internal	[actual lead times for orders shipped] / [total number of orders shipped]
Total # of Purchase Orders	Business Unit	Internal	Total number of purchase orders for a period.
Total # of Shipments	Business Unit	Internal	Total # of shipments made for a period.
# Shipments On-Time & Qty Correct	Business Unit	Internal	# shipments made by the commit date with the quantity requested.
Sum of Shipment Lead Times	Business Unit	Internal	Sum difference between shift date and request date.
# of On-Time Shipments	Business Unit	Internal	# shipments made on or before the scheduled date.

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
# Shipments With Backorder Qty	Business Unit	Internal	# shipments made having a backorder amount.
# Shipments Made In-Full	Business Unit	Internal	# shipments made with the correct requested quantity.
Total # of Orders Received	Business Unit	Internal	Total number of orders received in a period.
# of Orders Invoiced Correctly	Business Unit	Internal	# Orders received with correct invoice amount.
Purchase Qty Accepted	Business Unit	Internal	Sum of QTY_SH_ACCPT_ SUOM for all orders received
# Orders Received On-Time	Business Unit	Internal	# of orders received by the promised date
# Orders Received Qty Correct	Business Unit	Internal	# orders received with the correct order quantity
Total Order Qty Received	Business Unit	Internal	Sum of QTY_SH_RECVD_ SUOM for all orders received
Total purchase amount	Business Unit	Internal	Sum of MERCH_AMT_BSE for all orders
Purchase amount under contract	Business Unit	Internal	Sum of MERCH_AMT_BSE where CNTRCT_ID is not NULL'
Customer Satisfaction Score	Business Unit	Internal	Average of customer satisfaction scores.
Cost Of Goods Sold	Business Unit	Financial	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
% PO Invoiced Correct	Business Unit	Supplier	(# of purchase orders invoiced correctly / total # purchase orders) * 100
% Orders Returned	Business Unit	Internal	# orders returned within a period / # orders shipped within same period
% Orders Received On Time	Business Unit	Internal	% of orders received on time.
% Ordered Quantity Correct	Business Unit	Internal	(quantity received correct / total receipt quantity) - (received qty correct / receipts qty shipped) * 100

KPI Name	*Dimension (Object Type)*	*Perspective*	*KPI Calculation*
% Ordered ($) Under Contract	Business Unit	Internal	(purchased amount under contract / purchased amount closed) * 100
% On Time Delivery	Business Unit	Internal	# shipments made per commit date / total # shipments made
% Returned	Business Unit	Internal	(# orders returned within a period / # orders shipped within same period) * 100
Days Payable Outstanding	Business Unit	Internal	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Days of Inventory Supply	Business Unit	Internal	Current days of inventory supply
Days Sales Outstanding	Business Unit	Internal	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
% Perfect Order Fulfillment	Business Unit	Internal	((# shipments made on time per a requested date - # shipments having errors) / total # shipments) * 100
Sum of Supply Chain Costs	Business Unit	Internal	MFG_CST011 + MFG_CST012 + MFG_CST013 + MFG_CST014 + MFG_CST015 + MFG_CST016 + MFG_CST017
Cash to Cash Cycle Time	Business Unit	Internal	(total inventory days of supply + days of sales outstanding) - days of payables outstanding
# Shipments Having Errors	Business Unit	Internal	# of instances of product returns for a period
# Returned Orders	Business Unit	Internal	# of instances of product returns for a period
% Receipts Qty Correct	Business Unit	Internal	(MFG_RCV003 / MFG_RCV001) * 100
% Backorders	Business Unit	Internal	# shipments having a backorder qty / total # of shipments made
# of Orders Shipped	Business Unit	Internal	Total # of shipments.

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
# of Orders Shipped On Time	Business Unit	Internal	# of on-time shipments.
Delivery Performance	Business Unit	Internal	Percent on time delivery.
Average Item Cost (Unit Cost Per Item)	Business Unit	Internal	Sum of (std_cost) / sum of (items)
Average Item Inventory	Business Unit	Internal	Sum of (qty_onhand) / sum of (items)
Average Item Use Per Month	Business Unit	Internal	use_per_year / 12
Inventory Dollar Days	Business Unit	Internal	unit cost * (average inventory / average use per month)
Investment	Business Unit	Internal	material costs + cost of work in progress + finished goods costs + facilities costs + equipment costs
Raw Material Costs	Business Unit	Financial	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Work in Progress Cost	Business Unit	Internal	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Facilities Costs	Business Unit	Financial	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Equipment Costs	Business Unit	Financial	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Inventory Turns	Business Unit	Internal	throughput / inventory
Net Profit	Business Unit	Internal	throughput – operating expense
Operating Expense	Business Unit	Internal	throughput – operating expense

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
Cost of Salary and Wages	Business Unit	Internal	wage costs + cost of benefits + utilities costs + insurance costs + lease expenses + interest + taxes
Cost of Benefits	Business Unit	Financial	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Cost of Utilities	Business Unit	Financial	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Insurance Costs	Business Unit	Financial	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Lease Costs	Business Unit	Financial	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Interest Costs	Business Unit	Financial	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Taxes	Business Unit	Financial	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Productivity	Business Unit	Internal	throughput / operating expense
Return on Investment	Business Unit	Internal	net profit / inventory
Throughput	Business Unit	Internal	total sales – total variable expense
Shipment Days Late	Business Unit	Internal	Sum of (ship_date – request_date)
Shipment Value	Business Unit	Internal	Sum of (unit_price * ship_qty)

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
Throughput Dollar Days	Business Unit	Internal	shipment days late * shipment value
Total Variable Expense	Business Unit	Internal	material cost + sales commissions + shipping costs + packaging costs
Material Costs	Business Unit	Financial	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Sales Commissions	Business Unit	Financial	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Shipping Costs	Business Unit	Financial	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Packaging Costs	Business Unit	Financial	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Respond To Environment Change	Business Unit	Internal	#days to identify environmental change and devise response + # days to achieve supply of material for new demand level + days to achieve sustained make rate for new demand level + # days to achieve sustained delivery rate at required service levels.
Achieve New Material Supply	Business Unit	Internal	# days required to achieve a new material supply schedule.
Achieve New Production Rate	Business Unit	Internal	# days required to implement a new production rate.
Achieve New Delivery Rate	Business Unit	Internal	# days required to achieve a new delivery rate.
Order Management Costs	Business Unit	Internal	Costs associated with order processing.
Procurement Costs	Business Unit	Internal	Costs associated with purchasing and procurement.

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
Planning Costs	Business Unit	Internal	Costs associated with planning activities.
MIS Costs	Business Unit	Internal	Costs associated with operating MIS operations.
Warranty Costs	Business Unit	Internal	Costs associated with warranty replacements.
Returned Product Costs	Business Unit	Internal	Costs associated with processing returned goods.
Total Product Profit	Business Unit	Internal	Resolved using customer-specific PeopleSoft tree structure defining list of General Ledger account groups.
Supply Chain Fixed Asset Value	Business Unit	Internal	(Supply chain revenue contribution / supply chain fixed asset value) * 100.

Delivered KPIs

Details about the delivered KPIs are provided in the MFGPIS.PDF file that is located in the documentation. This file provides information on each of the delivered predefined KPIs via summary and detail tables. Use these tables to better understand Manufacturing Scorecard calculations. You can also use the information in these tables as a basis for altering the scorecard to update KPIs and target rules.

Setting Up and Using Manufacturing Scorecard

To use Manufacturing Scorecard perform the following tasks:

1. Set up PeopleSoft EPM warehouse tables.
    - Define PeopleSoft EPM components including business rules, general options, business units, business models, scenarios, security, ledgers and templates, tablemaps, datamaps, filters, and constraints.
    - Extract, transform, and load data from source tables into the Operational Warehouse Staging tables.
    - Review data warehouse tables delivered with the system.
    - Run ETL to populate the data warehouse tables.
2. Set up Scorecard tables (optional).

You are not required to set up these tables to implement Manufacturing Scorecard if you plan to use only the delivered Manufacturing Scorecard KPIs. The metadata for these KPIs is also delivered; it is in the SHARE SetID. However, if you plan to establish your own scorecards or KPIs, you *will* need to establish these tables.

- Define your strategy, which includes creating strategy trees and strategy components; setting up strategy components and specifying their assessment method, and creating the scorecard definition.
- Prepare data required for KPIs which includes these tasks: define the data from the Enterprise Warehouse that is the basis for your data elements (data elements are used by KPIs to measure actual results); create calculation definitions on which to base a KPI; specify what type of activity should occur as a result of KPI assessment; establish actions to take as a result of KPI assessment (actions are made up of one or more activities); establish assessment definitions—that is, when the target rule that uses this assessment evaluates as true, the image assigned appears on the scorecard.
- Define KPIs, including calculation and assessment frequency, attachments, analysis paths, report attributes, and notes.
- Establish the security groups for viewing KPIs and for KPI assessment.
- Define assessments.
- Define summary calendars.
- If you use default targets for any KPI dimension members, enter those values.
- Set up user profiles.

3. Set up Manufacturing Scorecard.
   - Define calculations.
   - Define parameters for calculating metrics.

Defining Calculations and Calculating Metrics

This topic provides an overview of Manufacturing Scorecard calculations and discusses how to:

- Define data elements and calculations.
- Calculate metrics.
- Review metrics.

Pages Used to Define Calculations and Calculate Manufacturing Scorecard Metrics

Page Name	***Definition Name***	***Navigation***	***Usage***
Define Calculations	MFG_KPIVAL_DFN	Scorecards, Industry-Specific Processing, Mfg Scorecard Calculations, Define Calculations	Identify data element IDs that are used to calculate Manufacturing Scorecard KPIs, and associate an existing SQL object to perform the calculation.
Calculate Metrics	RUN_MFG_KPI_JOB	Scorecards, Industry-Specific Processing, Mfg Scorecard Calculations, Calculate Metrics	Enter any manual KPI value overrides and schedule the Calculate MFG Metrics (MFG_KPI_CALC) Application Engine process. This process calculates period-based metric values. The process performs calculations according to the metric definitions that are specified on the Define Calculations page.
Review Metrics	MFG_KPIVAL_RVW	Scorecards, Industry-Specific Processing, Mfg Scorecard Calculations, Review Metrics	Review and confirm the calculated results for a specific fiscal period and year.

Understanding Manufacturing Scorecard Calculations

The Manufacturing Scorecard, provides you with the ability to manage the metrics that formulate the KPIs. Here you can define the root data element values and the associated SQL, financial data, or manual input used to extract the metrics from PeopleSoft EPM. Doing so allows you to easily configure the metric derivations without having to navigate through all of the PeopleSoft EPM and KPI configuration pages.

You can use the Define Calculations component to define the data element IDs that are used to calculated the scorecard metrics. The configuration settings are stored in the MFG_KPIVAL_DFN table. They are keyed by data element ID and are global to PeopleSoft EPM (that is, they are not keyed by SetID or business unit).

You then request the system to calculate the metrics for a specific business unit and fiscal period. The system reads the data element definitions from the MFG_KPIVAL_DFN table and allows you to override any manual KPI values. You schedule the Calculate Manufacturing KPI Metrics (MFG_KPI_CALC) application engine. This engine reads the data element definitions and carries out the specific logic to resolve metric calculations. The engine carries out the logic for each data element defined for the Manufacturing Scorecard and writes the results along with any manual KPI entries to the MFG metric F00 table (MFG_KPIVAL_F00). The results are keyed by business unit and transaction date such that the PF KPI Generator process can select data values using the standard Enterprise Scorecard assessment logic.

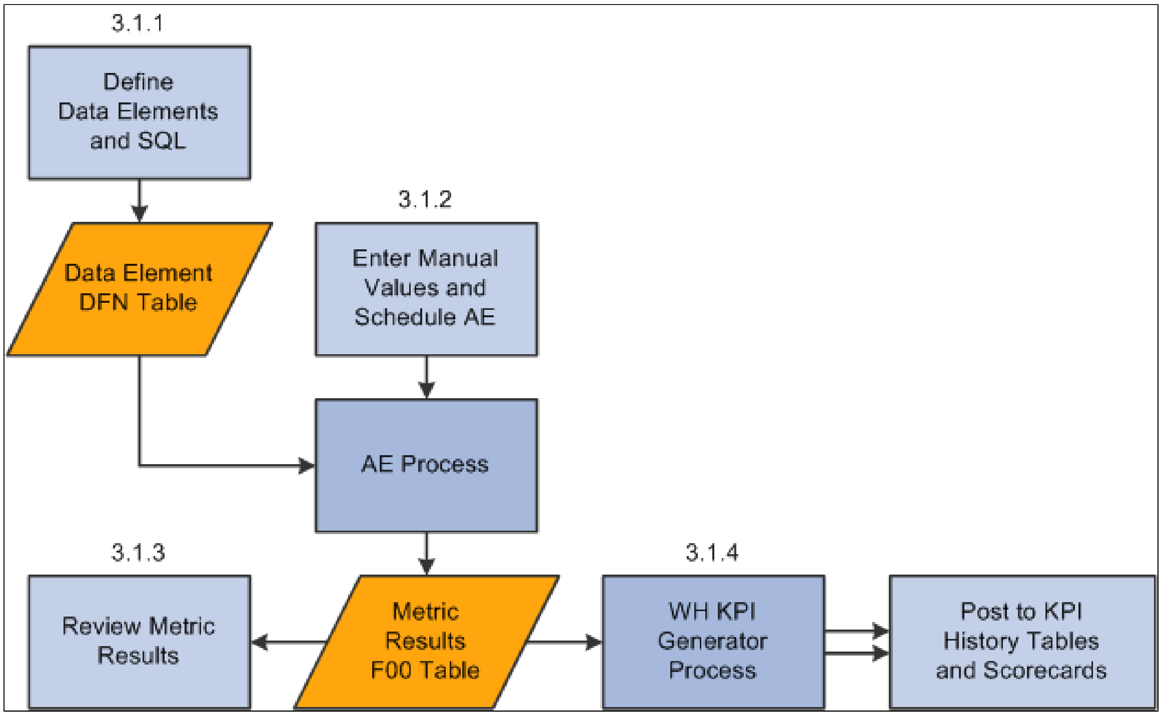
You can review the results for any fiscal period from the MFG_KPIVAL_F00 table.

The PF KPI Generator process refers to the MFG_KPIVAL_F00 table to resolve the final KPI calculations and post to the scorecard.

The following graphic illustrates the calculation process flow, from defining data elements through posting to KPI history tables and scorecards:

Image: KPI calculation process flow

KPI calculation process flow



Define Calculations Page

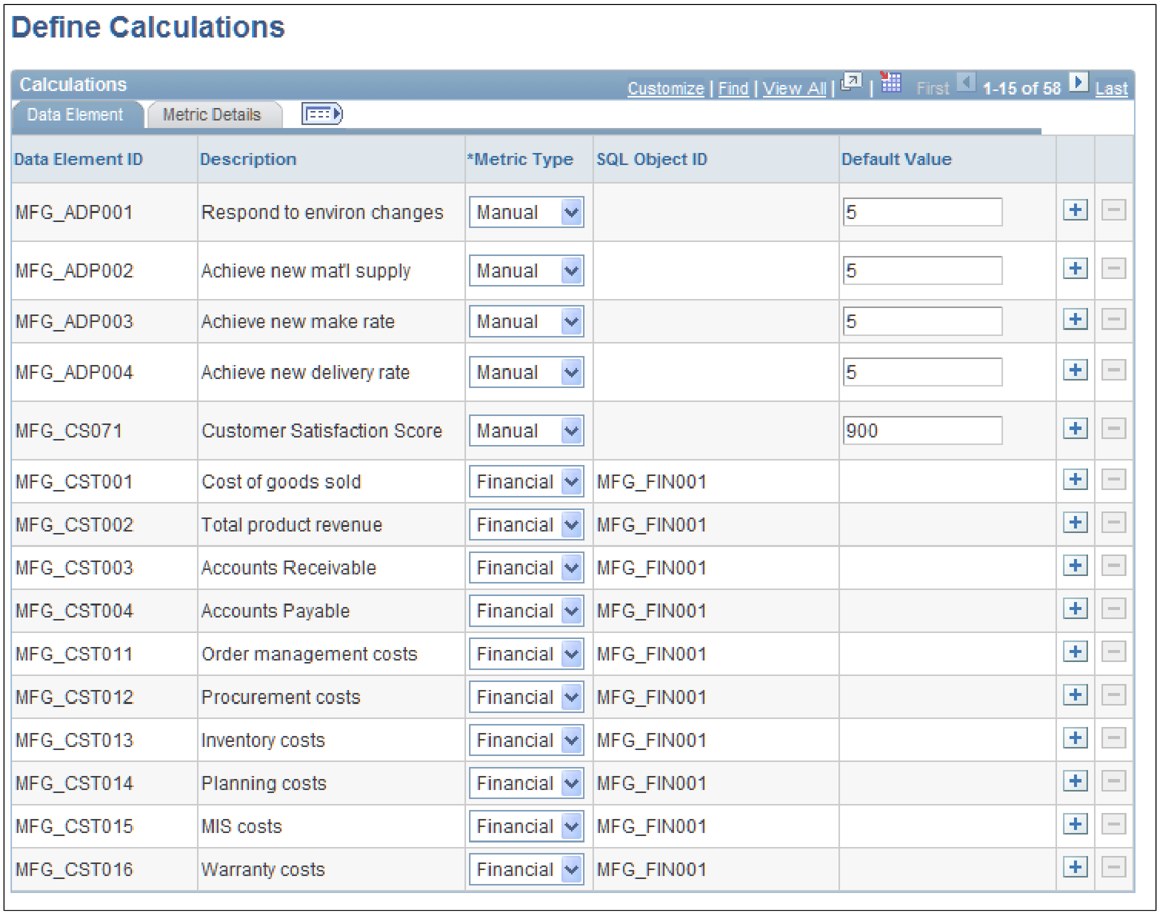
Use the Define Calculations page (MFG_KPIVAL_DFN) to identify data element IDs that are used to calculate Manufacturing Scorecard KPIs, and associate an existing SQL object to perform the calculation.

Navigation

Scorecards, Industry-Specific Processing, Mfg Scorecard Calculations, Define Calculations

Image: Define Calculations page

This example illustrates the fields and controls on the Define Calculations page. You can find definitions for the fields and controls later on this page.



Define Calculations

Calculations — Customize | Find | View All | First 1-15 of 58 Last

Data Element | Metric Details

Data Element ID	Description	*Metric Type	SQL Object ID	Default Value
MFG_ADP001	Respond to environ changes	Manual		5
MFG_ADP002	Achieve new mat'l supply	Manual		5
MFG_ADP003	Achieve new make rate	Manual		5
MFG_ADP004	Achieve new delivery rate	Manual		5
MFG_CS071	Customer Satisfaction Score	Manual		900
MFG_CST001	Cost of goods sold	Financial	MFG_FIN001	
MFG_CST002	Total product revenue	Financial	MFG_FIN001	
MFG_CST003	Accounts Receivable	Financial	MFG_FIN001	
MFG_CST004	Accounts Payable	Financial	MFG_FIN001	
MFG_CST011	Order management costs	Financial	MFG_FIN001	
MFG_CST012	Procurement costs	Financial	MFG_FIN001	
MFG_CST013	Inventory costs	Financial	MFG_FIN001	
MFG_CST014	Planning costs	Financial	MFG_FIN001	
MFG_CST015	MIS costs	Financial	MFG_FIN001	
MFG_CST016	Warranty costs	Financial	MFG_FIN001	

You can use this page to maintain calculations values as well as to add metrics.

Data Element Tab

Data Element ID

Lists the data element ID from the KP_DATAELEM_DEFN table.

Metric Type

Indicates the metric type of *Manual, Financial,* or resolved using *SQL*. *Financial* designates the calculation of financial general ledger-based metrics. For this metric type, you use trees to specify the specific account for the calculations on the Metric Details tab.

SQL Object ID

For metric types of *SQL* (prompted) and *Financial* (display only - MFG_FIN001 is always used), displays the SQL object ID that is used to perform database selection and calculation.

Default Value

For a metric type of *Manual,* use to enter a default metric value.

Note: The default value can be overridden at calculation time.

Metric Details Tab

SetID and Tree

For a metric type of *Financial,* specify the SetID and tree that contains the account group structure.

Node

For a metric type of *Financial,* specify the tree node that contains the account values.

Note: Each account value and/or range of account values contained in the selected node (and any child nodes) will be used at calculation time in order to determine the correct general ledger F00 table data to extract and use in the metric.

Click the Select Tree Node button to access the Tree Viewer page, on which you can select the specific account that you want to use by expanding the folders of the tree, highlighting the account, and clicking the Select button. The account appears in the Node field on the Define Calculations page.

Calculating Metrics Page

Use the Calculate Metrics page (RUN_MFG_KPI_JOB) to enter any manual KPI value overrides and schedule the Calculate MFG Metrics (MFG_KPI_CALC) Application Engine process.

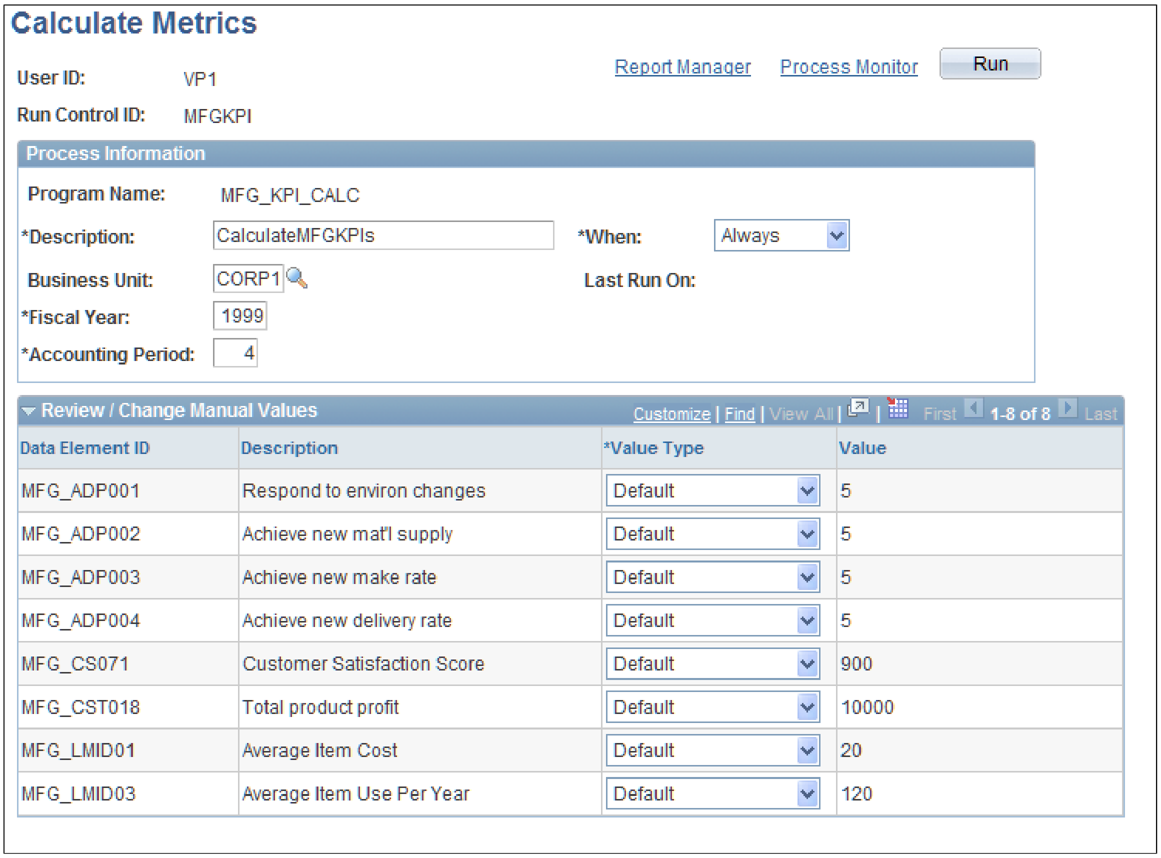
This process calculates period-based metric values. The process performs calculations according to the metric definitions that are specified on the Define Calculations page.

Navigation

Scorecards, Industry-Specific Processing, Mfg Scorecard Calculations, Calculate Metrics

Image: Calculate Metrics page

This example illustrates the fields and controls on the Calculate Metrics page. You can find definitions for the fields and controls later on this page.



Description and Business Unit	Enter a description and select the performance business unit to which the KPI results resolves.
Fiscal Year and Accounting Period	Specify the fiscal year and period for the metric calculation.
Review/Change Manual Values	Use the Review/Change Manual Values group box to review the current values for the manual KPIs. These are initially set on the Define Calculations page. You can override any value before calculating by setting the value type to *Override* and entering a new value in the Value field. You can also specify *No Value* for a metric. Doing so cancels the assessment of any KPI that is based on that metric.

After you have completed any manual value override setup, click the Run button to schedule the MFG_KPI_CALC application engine process. This process reads the data element definitions and carries out the SQL to resolve metric calculations. The engine writes the results to the MFG_KPIVAL_F00 table, where they are picked up by the BC_Analyze process.

Reviewing Metrics Page

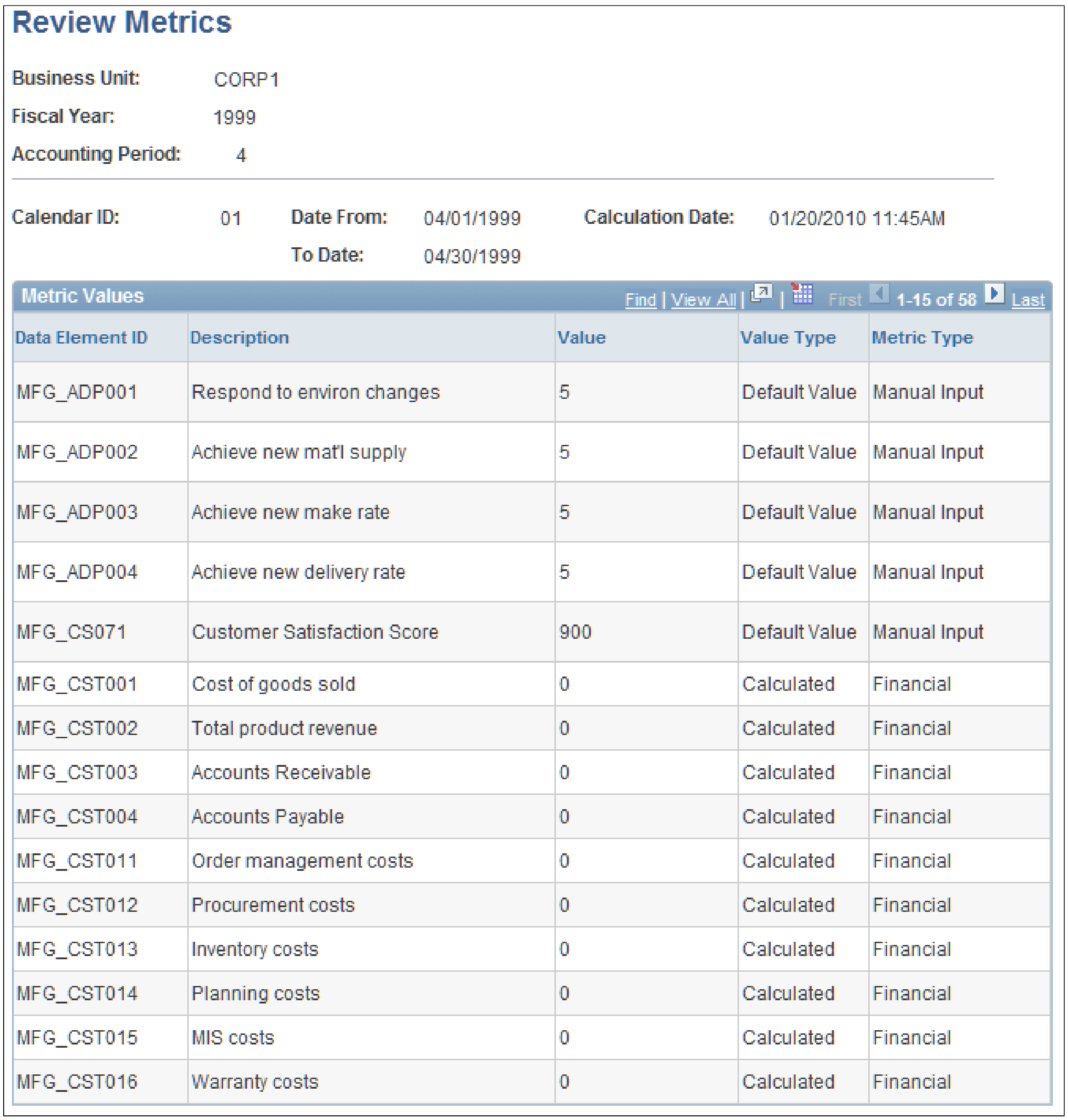
Use the Review Metrics page (MFG_KPIVAL_RVW) to review and confirm the calculated results for a specific fiscal period and year.

Navigation

Scorecards, Industry-Specific Processing, Mfg Scorecard Calculations, Review Metrics

Image: Review Metrics page

This example illustrates the fields and controls on the Review Metrics page. You can find definitions for the fields and controls later on this page.


Review Metrics

Business Unit: CORP1

Fiscal Year: 1999

Accounting Period: 4

Calendar ID: 01 Date From: 04/01/1999 Calculation Date: 01/20/2010 11:45AM

To Date: 04/30/1999

Metric Values Find | View All | First 1-15 of 58 Last

Data Element ID	Description	Value	Value Type	Metric Type
MFG_ADP001	Respond to environ changes	5	Default Value	Manual Input
MFG_ADP002	Achieve new mat'l supply	5	Default Value	Manual Input
MFG_ADP003	Achieve new make rate	5	Default Value	Manual Input
MFG_ADP004	Achieve new delivery rate	5	Default Value	Manual Input
MFG_CS071	Customer Satisfaction Score	900	Default Value	Manual Input
MFG_CST001	Cost of goods sold	0	Calculated	Financial
MFG_CST002	Total product revenue	0	Calculated	Financial
MFG_CST003	Accounts Receivable	0	Calculated	Financial
MFG_CST004	Accounts Payable	0	Calculated	Financial
MFG_CST011	Order management costs	0	Calculated	Financial
MFG_CST012	Procurement costs	0	Calculated	Financial
MFG_CST013	Inventory costs	0	Calculated	Financial
MFG_CST014	Planning costs	0	Calculated	Financial
MFG_CST015	MIS costs	0	Calculated	Financial
MFG_CST016	Warranty costs	0	Calculated	Financial

Specify the fiscal year and accounting period for which you want to review the results.

Calendar ID	Displays the ID of the calendar associated with the selected business unit.
Date From and Date To	Displays the date range of the fiscal period (based on the calendar ID used).
Calculation Date	Displays the date and time that the calculation was performed.
Data element ID and Description	Displays the ID and description of the data elements that were included in the calculation.
Value	Displays the value of the metric. For manual KPIs this is the manual value entered. For calculated KPIs, this is the calculated value.
Value Type	Displays the value type. Possible types are: *Default* (default manual value), *No Value* (no value was entered for a manual metric), *Error* (an error occurred during calculation), and *Calculated.*
Metric Type	Displays the metric type. Possible types are: *Manual* (manual KPIs), *Financial* (KPIs that are derived from financial general ledger data), and *SQL* (SQL derived KPIs).

Note: This is a display-only page. To make corrections, rerun the Calculate KPI application engine for the fiscal year and period.

Chapter 11

Using Healthcare Scorecard

Understanding Healthcare Scorecard

Today, businesses measure their success based on several KPIs. A scorecard is an enterprise tool for the evaluation and communication of strategic objectives and their KPIs. The Healthcare Scorecard enhances healthcare management by providing key performance indicators that enable healthcare organizations to effectively manage their organization performance by enabling them to:

- Build a strong financial base.
- Grow the targeted patient base.
- Deliver cost-effective care.

Healthcare Scorecard works in conjunction with Scorecard to provide a current representation of how your healthcare organization is meeting its healthcare-centric objectives. Data flows through Scorecard based on a defined frequency. Transactional data is provided to the PeopleSoft EPM warehouses, where it is transformed using the Scorecard analysis tools. The system displays analysis results to users who can use this information to analyze or take actions as necessary. The analysis results are accessed using the company intranet or business home page.

This topic discusses:

- Integrations
- Scorecards and strategy components
- KPIs
- Batch processes

Integrations

Healthcare Scorecard supports the Plan to Produce, Target to Engage, and Request to Resolve business processes.

Healthcare Scorecard data tables reside in the PeopleSoft EPM database, which serves as a data repository that can include data from other PeopleSoft applications and other legacy systems. Healthcare Scorecard also takes advantage of the functionality of the Scorecard.

Healthcare Scorecard enables you to manage your healthcare business. It is composed of a set of predefined key performance indicators that provide executive and middle management with a summary of healthcare activities in your organization. The application provides metrics that are related to hospital staffing, surgery utilization, and materials-management contract compliance. These metrics enable your managers to increase capacity and minimize excess expenses. The scorecard also enables the CFO and department managers to manage to operational metrics such as average length of stay, case-mix index, and census levels.

Scorecards and Strategy Components

A scorecard is the visual representation of the objectives that your organization is striving to achieve. Its foundation is a strategy tree that is made up of hierarchical nodes of strategy components.

Healthcare Scorecard delivers the HC_CFO, Healthcare CFO scorecard.

Strategy components are the elements that make up your strategy and are the nodes on your strategy tree or tables. Vision, strategic thrusts, and critical success factors are all strategy components, and represent the goals that your healthcare organization is trying to achieve. KPIs, which measure how well an organization is achieving those goals, are attached to scorecard strategy components.

The predefined data components that make up the Healthcare Scorecard are delivered at installation. After you install the database, setting up and accessing the Healthcare Scorecard involves setting up PeopleSoft EPM, populating the data warehouse with data, updating several components of the Scorecard, and populating the final reporting tables.

Note: Before you attempt to set up the Healthcare Scorecard, you should have installed the appropriate components using the installation documentation and moved the appropriate data components to your system database.

Each scorecard works with Scorecard to provide you with an up-to-date view of how your organization is meeting its healthcare objectives. Using this scorecard is optional. This table lists the field values for these scorecards:

Scorecard ID	HC_CFO
SetID	SHARE
Business Unit	HHC01
Strategy Tree	HC_STRATEGY
Strategy Components	The strategy components that are associated with this scorecard are: • ST_HC1 - Optimize revenue. • ST_HC2 - Maximize customer satisfaction. • ST_HC3 - Provide quality care. • ST_HC4 - Train all medical staff. All are strategic thrusts.

This table lists the critical success factors for each of the strategic thrusts:

ST_HC1	• CSF_F1 - Build a strong financial base. • CSF_F2 - Grow targeted patient base.

	• CSF_F3 - Deliver cost-effective care.
ST_HC2	• CSF_C1A - Provide personalized care. • CSF_C2A - Provide easy access.
ST_HC3	• CSF_P1 - Provide outstanding customer service. • CSF_P2 - Keep patients informed. • CSF_P3 - Streamline processes. • CSF_L1 - Hire and develop the best. • CSF_L2 - Support employee engagement. • CSF_L3 - Communicate expectations. • CSF_L4 - Deliver on the strategy.

You can modify the delivered scorecard to suit your implementation.

KPIs

A KPI defines the data value or calculation from the PeopleSoft EPM database that is evaluated to determine how well your organization is meeting its critical success factors.

Healthcare Scorecard delivers a set of preconfigured KPIs that provide your management with the tools it needs to analyze your healthcare operation against business objectives. PeopleSoft has developed these KPIs in conjunction with leading consultants, and they measure many factors including patient data, financial performance, and human resources data.

The KPI IDs of the delivered Healthcare Scorecard KPIs are delivered under the *SHARE* SetID and use the following naming convention:

- HC_EXT – KPIs using external data.
- HC_FDB and HC_FMS – KPIs using financials data.
- HC_HR – KPIs using human resources data.
- HC_MAN – Manual KPIs to enter patient survey data.
- HC_SCM – KPIs using supply chain data.

Batch Processes

You must run the following jobstreams to populate key tables:

- KP_ANALYZE

  This jobstream populates KP_KPI_CALC_F00 and KP_KPI_ASMT_F00. Run this jobstream to validate the KPI calculation rules, verify end values, and test the KPI assessment rules.

- BC_ANALYZE

This jobstream populates KP_KPI_CALC_F00, KP_KPI_ASMT_F00 and BC_ASSESS_F00. Run this jobstream to generate the final scorecard assessments after you validate your setup (by running KP_ANALYZE). If you set up this job to run regularly, the KPI process can aggregate data month-to-month and year-to-date. You must run this process after you populate or update the PeopleSoft EPM tables (such as during the Extract Transform and Load process) to view current results for your healthcare scorecard.

Related Links

Understanding KPI and Scorecard Processing

Healthcare Scorecard Summary

The following table contains a summary of the KPIs that are delivered with Healthcare Scorecard. It lists the KPI description, dimension or object type, perspective type, and KPI calculation definition.

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
Average length of stay	Business unit	Sourced from external data	Patient days in month ÷ total discharges in month
Maintained bed occupancy	Business unit	Sourced from external data	(Patient days × 100) ÷ (Maintained beds × 365)
FTEs per adjusted occupied bed.	Business unit	Sourced from external data	FTEs ÷ Maintained bed occupancy
Average daily census, monthly	Business unit	Sourced from external data	Number of patient days in month ÷ days in month
Case mix index	Business unit	Sourced from external data	Case mix value from external system.
Surgical cases outpatient	Business unit	Sourced from external data	Value from external system
Surgical cases inpatient	Business unit	Sourced from external data	Value from external system
Emergency visits outpatient	Business unit	Sourced from external data	Value from external system
Encounters outpatient	Business unit	Sourced from external data	Value from external system
Admissions inpatient	Business unit	Sourced from external data	Value from external system
Discharges inpatient	Business unit	Sourced from external data	Value from external system
Cash and equivalents	Business unit	Financial	Total cash and equivalents.
Investments at market value	Business unit	Financial	Total investments at market value.
Patient accounts receivable	Business unit	Financial	Total patient accounts receivable.

KPI Name	*Dimension (Object Type)*	*Perspective*	*KPI Calculation*
Property, plant & equipment	Business unit	Financial	Total property, plant, and equipment.
Other assets	Business unit	Financial	Total other assets.
Total Assets	Business unit	Financial	Total of all assets.
AP and accrued expenses	Business unit	Financial	Total of AP and accrued expenses.
Due to 3rd parties	Business unit	Financial	Total due to 3rd parties.
Long-term debt	Business unit	Financial	Total long-term debt.
Other liabilities	Business unit	Financial	Total other liabilities.
Net assets	Business unit	Financial	Total net assets.
Total liabilities	Business unit	Financial	Total liabilities.
Short-term investments	Business unit	Financial	Total short-term investments.
Depreciation funds	Business unit	Financial	Total depreciation funds.
Education funds	Business unit	Financial	Total education funds.
Total unrestricted funds	Business unit	Financial	Total unrestricted funds.
Long-term investments	Business unit	Financial	Long-term investments
Total cash and investments	Business unit	Financial	Total Cash and investments
Operating revenues	Business unit	Financial	Operating revenues
Salaries and benefits	Business unit	Financial	Salaries and benefits
Supplies and services	Business unit	Financial	Supplies and services
Capital expenses	Business unit	Financial	Capital expenses
Uncompensated care	Business unit	Financial	Uncompensated care
Total operating expenses	Business unit	Financial	Total of all .
Operating income	Business unit	Financial	Based on the monthly general ledger.
Non-operating gains	Business unit	Financial	Based on the monthly general ledger.
Unrealized Gains	Business unit	Financial	Based on the monthly general ledger.

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
Total income	Business unit	Financial	Total Income based on the monthly general ledger.
% of revenue charitable	Business unit	Financial	Amount of total revenues that comes from charity. % of revenue charitable.
Inventory ratio	Business unit	Supply Chain	Based on the total revenue $ and inventory $. Total revenue/Inventory
Break even	Business unit	Financial	Operating expenses/Net patient revenue
Inpatient capitated revenue %	Business unit	Financial	Inpatient capitated revenue / Revenue
Inpatient commercial revenue %	Business unit	Financial	Inpatient commercial revenue/ revenue
Inpatient HMO revenue %	Business unit	Financial	Inpatient HMO revenue/ Revenue
Inpatient Medicaid revenue %	Business unit	Financial	Inpatient Medicaid revenue/ Revenue
Outpatient Medicare revenue %	Business unit	Financial	This Healthcare KPI provides outpatient revenue ratio by dividing Outpatient revenue from Total revenue
Inpatient self pay revenue %	Business unit	Financial	Inpatient self pay revenue/ Revenue
Net income	Business unit	Financial	Net revenue-operating expenses
Net income to patient revenue	Business unit	Financial	(Net revenue-Operating expenses)/(Net patient revenue+Premium revenue)
Non-Operating gain	Business unit	Financial	Net non operating gains/Total revenue
Operating margin %	Business unit	Financial	(total operating revenue-total operating expenses)/total operating revenue*100
Total Margin	Business unit	Financial	Excess revenues over expenses/Total revenues*100
Free operating cash flow to revenue	Business unit	Financial	(Operating cash flow – capital expenditures) ÷ total revenues × 100

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
Free operating cash flow to assets	Business unit	Financial	(Operating cash flow – capital expenditures) ÷ total assets × 100
Reported income index	Business unit	Financial	Excess of revenues over expenses ÷ Change in net assets
Return on equity	Business unit	Financial	Excess of revenues over expenses ÷ Net assets
Growth rate on equity	Business unit	Financial	Change in net assets/Net assets
Debt service coverage ratio	Business unit	Financial	REVENUE / (PRNCL_ PTMNT + INT_EXP)
Times interest earned	Business unit	Financial	(Revenue – Operating Expense) ÷ Interest expense
Current ratio	Business unit	Financial	current assets ÷ current liabilities
Depreciation rate	Business unit	Financial	Depreciation ÷ Property, plant and equipment
Capital expenditure growth rate	Business unit	Financial	Capital expenditures ÷ Gross property, plant and equipment × 100
Working capital absorption	Business unit	Financial	Increase in net working capital (excluding short term cash) ÷ (Excess of revenues over expenses + depreciation) × 100
Replacement viability	Business unit	Financial	Price level adjusted accumulated depreciation
Accounts receivable (days)	Business unit	Financial	(accounts receivable × 365) ÷ (total expenses – depreciation)
Average payment period (days)	Business unit	Financial	(current liabilities × 365) ÷ (total expenses – depreciation)
Debt to capitalization %	Business unit	Financial	LT_DEBT ÷ (LT_DEBT + assets)
Fixed asset financing %	Business unit	Financial	Long term debt ÷ Net fixed assets × 100
Cash flow to total debt %	Business unit	Financial	(Excess of revenues over expense + depreciation expense) ÷ (Current liabilities + long term debt) ÷ 100

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
Cash flow to total liabilities %	Business unit	Financial	(revenues – operating expense + depreciation and amortization expense) ÷ Total liabilities × 100
Cash on hand (days)	Business unit	Financial	(cash and cash equivalents + board designated funds for capital) × 365 ÷ (total operating expenses – depreciation and amortization expenses)
Capital expense (%)	Business unit	Financial	(interest expense + depreciation & amortization expenses) ÷ total operating expenses
Equity financing	Business unit	Financial	Net assets ÷ total assets × 100
Average age of plant	Business unit	Financial	accumulated depreciation ÷ depreciation expense
Bad debt % of net revenue	Business unit	Financial	Bad debt expense ÷ Net revenue × 100
Total asset turnover	Business unit	Financial	Total revenue ÷ total assets
Fixed asset turnover	Business unit	Financial	Total revenue ÷ net fixed assets
Current asset turnover	Business unit	Financial	Total revenue ÷ Current assets
Cash collected vs target (12 month average)	Business unit	Financial	Accounts receivable ÷ 12 month average of last years collection
Reserve levels	Business unit	Financial	Total monetary reserve levels.
Accounts receivable for current accounting period	Business unit	Financial	Accounts receivable value taken from the general ledger.
Assets in current period	Business unit	Financial	Value taken from the general ledger.
Assets in prior period	Business unit	Financial	Value taken from the general ledger.
Working capital for current accounting period	Business unit	Financial	Current assets – current liabilities
Working capital for prior accounting period	Business unit	Financial	assets for prior accounting period – liabilities for prior accounting period

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
# of new hires per day	Business unit	HRMS	The average number of new employees hired each week. # new hires per period ÷ # days per period
Source of hires versus cost	Business unit	HRMS	Lists the average cost of a new hire by hiring source on a quarterly basis. Total hiring cost ÷ # from source
Staff turnover	Business unit	HRMS	The monthly staff turnover % for the entire business unit. # employees terminated by BU ÷ total employees by BU
Staff turnover by location	Department	HRMS	Monthly staff turnover by department. # employees terminated by department ÷ total employees by department
Total turnover per tenure	Tenure group	HRMS	Monthly staff turnover by years of service. Categories are: 0–1, 2–5, 6–10 & 10+ . # employees terminated by tenure group ÷ total employees by tenure
Total turnover per manager	Employee	HRMS	Monthly staff turnover by manager. # employees terminated per manager ÷ total employees per manager
Staff turnover by job code	Job code set	HRMS	Monthly staff turnover by job code. # employees terminated by job code ÷ total employees by department
Voluntary staff turnover %	Business unit	HRMS	Calculates the percentage of employees who quit or left the company each month. # Voluntary turnover ÷ # total turnover

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
Average age of workforce	Business unit	HRMS	Calculates the average age of employees. Sum ages of employees ÷ # of employees
Average time to fill positions	Business unit	HRMS	Calculates how long all current positions have been vacant. Sum days positions has been opened ÷ # of positions
Vacancy rate	Business unit	HRMS	Calculates the percentage of open positions. # of open headcount ÷ # of total headcount
Outside labor as a % to total	Business unit	HRMS	Calculates the percentage spent on outside labor each month. This Healthcare KPI provides outside labor cost % by dividing outside labor cost from total labor cost.
Total revenue per FTE	Business unit	HRMS	Calculates how much was earned per full time equivalent. This Healthcare KPI provides total revenue per FTE by dividing total revenue dollars from general ledger by total FTE numbers from time labor data.
Revenue/physician FTE	Business unit	Internal	Calculates how much was earned per full time physician. This KPI provides Revenue per physician FTE by dividing revenue data from General Ledger by Physician FTE from Time labor data.
Expense/physician FTE	Business unit	Internal	Calculates how much was paid in salaries per full time physician. This KPI provides expense per physician FTE by dividing expense data from general ledger by physician FTE from time and labor data.

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
Days in accounts receivable	Business unit	Internal	Calculates how quickly accounts receivables was collected. Total number of days.
FTE	Business Unit	Internal	Monthly full time equivalent. Calculates full time equivalent (FTE) by the following calculation: (Total Reported hours × 12 ÷ 2080)
Inpatient revenue %	Business unit	Financial	Calculates inpatient revenue % by dividing inpatient revenue by total revenue.
Outpatient revenue %	Business unit	Financial	Calculates outpatient revenue % by dividing outpatient revenue by total revenue.
Total salary per FTE	Business unit	Internal	Total salary ÷ Total FTE
Total benefits per FTE	Business unit	Internal	Total benefits ÷ Total FTE
Total compensation per FTE	Business unit	Internal	(Total Salary + Total Benefits) ÷ Total FTE
PTO costs at department level	Department	Internal	Paid Time Off pay ÷ Department salary
PTO costs at BU level	Business unit	Internal	PTO pay ÷ Total Salary
Overtime costs	Business unit	Internal	Overtime Pay ÷ (Total Salary + Total Benefits)
PTO FTEs of Total FTEs	Business unit	Internal	PTO hours FTE ÷ Total FTE
Average hourly rate	Business Unit	Internal	Total labor cost ÷ Total labor hours
Part time FTEs of total FTEs	Business unit	Internal	Part time hours FTE ÷ Total FTE
Weekly payroll	Business unit	Internal	Payroll amount (per week).
Operating profit margin	Business unit	Internal	Calculates the profit margin by dividing Total Operating Profit by Total Operating Revenues.

KPI Name	*Dimension (Object Type)*	*Perspective*	*KPI Calculation*
Physician FTE	Business unit	Internal	Calculates the physician FTE by Physician reported work hours from the following: Time and labor data × 12 ÷ 2080
Satisfaction with physical	Business unit	Survey data	This is a manual KPI.
Nurses' attention to needs	Business unit	Survey data	This is a manual KPI.
Informed about delays	Business unit	Survey data	This is a manual KPI.
Inventory turnover	Business unit	Supply Chain	Amount of inventory sold per month over the total inventory on hand.
Return to vendor	Business unit	Supply Chain	Percentage of inventory items returned to vendors.
Backorder percentage	Business unit	Supply Chain	Percentage of stock inventory not available.
Hazardous materials usage	Business Unit	Supply Chain	The volume of hazardous materials used. Trended over time.
Total PO dollar amount	Business unit	Supply Chain	Identifies the total value of all purchase orders each week.
PO quantity ordered by department (in US dollars)	Department	Supply Chain	The value of the total quantity ordered by each department.

Delivered KPIs

Details about the delivered KPIs are provided in the HCKPIS.PDF file that is located in the documentation. This file provides information about each of the delivered predefined KPIs through summary and detail tables. Use these tables to better understand Healthcare Scorecard calculations. You can also use the information in these tables as a basis for altering the scorecard to update KPIs and target rules.

All KPIs are stored in the enterprise data warehouse. PeopleSoft arranges this information by line of business (HR, Financials, Supply Chain, or CRM). This logical grouping is used for convenience and does not represent four separate warehouses. The Healthcare Scorecard spans all of the areas that are needed to provide a complete representation of the health of the organization.

Predefined KPIs are the basis for analysis within Healthcare Scorecard. You must understand the definition detail to understand what is being calculated in your scorecard results.

The delivered KPIs use the following sources: external data, financial data, human resources data, and supply chain data. The system also includes manual KPIs.

This topic discusses:

- External data
- Manual KPIs

External Data

The KPIs that are listed in this topic use data from external systems, such as Eclypsis TSI or McKesson Trendstar. You can configure the system to use data from such a system by creating an extract, transform and load (ETL) map to port the data from your system to the data warehouse tables that are used by these KPIs.

Note: You must configure your own ETL map for mapping this data into the data warehouse tables shown subsequently. For detailed information about how to create and use ETL maps, refer to the IBM WebSphere documentation.

The tables that you must populate are HC_EXT1_TABLE and HC_EXT2_TABLE.

HC_EXT1_TABLE

This table shows the structure of HC_EXT1_TABLE

Field	***Description***	***Field Type***	***Field Length***
BUSINESS_UNIT	Business unit.	Character	5
EFFDT	Effective date.	Date	10
EFF_STATUS	Status as of effective date.	Character	1
PATIENT_DAYS	Patient days.	Number	9.2
MAINTAINED_BED	Maintained beds.	Number	7

HC_EXT2_TABLE

This table shows the structure of HC_EXT2_TABLE

Field	***Description***	***Field Type***	***Field Length***
BUSINESS_UNIT	Business unit.	Character	5
EFFDT	Effective date.	Date	10
EFF_STATUS	Status as of effective date.	Character	1
CASE_MIX_INDEX	Case mix index.	Number	7.2
IP_ADMISSION	Inpatient admissions.	Number	7

Field	Description	Field Type	Field Length
IP_DISCHARGE	Inpatient discharges.	Number	7
IP_SURG_CASE	Inpatient surgical cases.	Number	7
OP_EMRG_VISIT	Outpatient emergency visits.	Number	7
OP_ENCOUNTER	Outpatient encounters.	Number	7
OP_SURG_CASE	Outpatient surgical cases.	Number	7

See also the *PeopleSoft Performance Management Fundamentals* documentation and the *IBM Websphere* documentation.

Manual KPIs

In addition to calculated KPIs, the system provides manual KPIs with the Healthcare Scorecard. Manual KPIs do not use data that is derived from PeopleSoft EPM tables to determine their values; the actual data element is stored in the data warehouse. Manual KPIs are loaded into the warehouse using the Scorecard Manual KPI page. Both calculated and manual KPIs use target rules to determine their assessments, and the system can calculate and assess quarter-to-date and year-to-date totals, depending on the options that you establish.

Related Links

Understanding KPI and Scorecard Processing

Prerequisites

You must load the delivered KPIs that are required for Healthcare Scorecard by running a data mover script when you install the application. This is detailed in the installation instructions.

See The *PeopleSoft EPM Installation* product documentation on the PeopleSoft My Oracle Support website.

Setting Up and Using Healthcare Scorecard

To use Healthcare Scorecard, perform the following tasks:

1. Set up PeopleSoft EPM.
    - Define PeopleSoft EPM components, including but not limited to business rules, general options, business units, business models, scenarios, security, ledgers and templates, tablemaps, datamaps, filters, and constraints.
    - Extract, transform, and load data from source tables into the Operational Warehouse Staging tables.

- Review data warehouse tables that are delivered with the system.
- Run the ETL process to populate the data warehouse tables.

2. Set up Scorecard tables.

   You are not required to set up these tables to implement PeopleSoft Healthcare Scorecard if you plan to use only the delivered Healthcare Scorecard KPIs. PeopleSoft delivers the metadata for these KPIs in the SHARE SetID. However, if you plan to establish your own scorecards or KPIs, you *must* establish these tables.

   - Define your strategy, including the following tasks: create strategy trees and strategy components; set up strategy components and specify their assessment method; create the scorecard definition.
   - Prepare data that is required for KPIs including the following tasks: define the data from the PeopleSoft EPM database that is the basis for your data elements (data elements are used by KPIs to measure actual results); create calculation definitions on which to base a KPI; specify what type of activity should occur as a result of KPI assessment; establish actions to take as a result of KPI assessment (actions are made up of one or more activities); establish assessment definitions—when the target rule that uses this assessment evaluates as true, the image assigned appears on the scorecard.
   - Define KPIs, including calculation and assessment frequency, attachments, analysis paths, report attributes, and notes.
   - Establish the security groups for viewing KPIs and for KPI assessment.
   - Define assessments.
   - Define summary calendars.
   - Enter values for default targets that you use for any KPI dimension members.
   - Set up user profiles.

Chapter 12

Using Supplier Rating System Scorecard

Understanding Supplier Rating System Scorecard

Supplier Rating System enables companies to make informed supply decisions that are optimal for the entire business. These decisions can include identifying the best supplier to select for a specific contract or determining entirely new supply strategies, such as which product areas would benefit from an expanded supplier base or consolidation of existing suppliers.

By collecting critical process information from across your organization—financial systems, manufacturing systems, and distribution systems—Supplier Rating System provides you with a complete, view of each supplier's performance. All of this information is combined into a supplier scorecard that is constantly updated and accessible across your company and to the supplier. This comprehensive data-collection process ensures data integrity when critical decisions are made.

Supplier Rating System analytics ensure that each measure of supplier performance is expressed in a format that can be objectively scored. The system includes over 80 KPIs, such as on-time delivery and % invoiced correctly, that provide an objective basis for supplier comparison. You can use different combinations and prioritizations of these KPIs to evaluate suppliers for each unique decision. The system highlights each supplier's strengths and weaknesses across multiple areas, and quantifies the supplier's fit for each specific request, enabling your employees to become more strategic buyers.

Supplier Rating System enables you to use preconfigured KPIs to analyze supplier performance. It is delivered with two preconfigured rating models that enable you to analyze performance using overall scores.

You can use the analytical information that Supplier Rating System includes to assist in selecting, monitoring, and evaluating current and future suppliers. Prior to requesting quotations from suppliers, buyers can be presented with a list of potential suppliers based on scores derived from Supplier Rating System. You can also use the scores and rankings to evaluate bidders from the bid management process, eliminating financially weak suppliers or suppliers with historically poor quality.

You can use Supplier Rating System along with Scorecard to organize KPIs into portfolios, and then analyze the portfolios using charting and weighting tools. You can use the Supplier Rating System KPIs to produce scores that can be made available to internal and external users.

Supplier Rating System includes two predefined scorecards, one of which is designed for your employees to use to analyze suppliers. The second scorecard is designed to provide your suppliers with a view of the summarized data on supplier performance through the PeopleSoft Supply Chain portal. The data can be accessed through three portal pagelets that are designed specifically for Supplier Rating System. Supplier Rating System also includes all portal pagelets that are delivered with Scorecard.

Supplier Rating System delivers two preconfigured models that are composed of specially designed composite KPIs. These are KPIs that are arranged in a hierarchy that produces a numerical score. The two models are Overall Rating (Compact) and Supplier Rating. You can view the structure of the models on the KPI Analysis page.

Supplier Rating System also enables you to integrate Dun & Bradstreet data for use with KPIs. Your supplier information can be exported to Dun & Bradstreet and imported into PeopleSoft EPM, to be used with fourteen preconfigured KPIs that are specifically designed to use Dun & Bradstreet data. The Dun & Bradstreet data addresses financial stability, demographics, socioeconomic factors, and corporate linkage for additional enrichment.

Note: The Dun & Bradstreet license is a separate license. To use Dun & Bradstreet data, you must be licensed to do so.

This topic discusses:

- Scorecards and strategy components
- KPIs
- Batch processes

See also *PeopleSoft Enterprise Performance Management Portal Pack* and *PeopleSoft Enterprise Performance Management Fundamentals*.

Scorecards and Strategy Components

A scorecard is the visual representation of the objectives that your organization is striving to achieve. The foundation of a scorecard is a strategy tree that comprises hierarchical nodes of strategy components.

Strategy components are the elements that make up your strategy and are the nodes on your strategy tree. Vision, strategic thrusts, and critical success factors are all strategy components, and represent the goals that your organization is trying to achieve. KPIs, which measure how well an organization is achieving those goals, are attached to scorecard strategy components, typically critical success factors.

Supplier Rating System delivers the scorecards SRS Buyer Scorecard and SRS Supplier Scorecard, which work with Scorecard to provide an up-to-date summary of how your organization is meeting its project development objectives. The following table lists the field values that are used by these scorecards. You can expand on these scorecards to suit your implementation.

Scorecard ID	SRM_BUYER_SCORECRD
	SRM_SUPPLIER_SCRCD
SetID	SHARE
Business Unit	US001
Strategy Components	SRM_STS_ST2_CSF1
	SRM_STS_ST2_CSF2
	SRM_STS_ST2_CSF3
	SRM_STS_ST2_CSF4
	SRM_STS_ST2_CSF5
	SRM_STS_ST2_CSF6

	SRM_SUPPLIER_CSF1
	SRM_SUPPLIER_CSF2
	SRM_SRS_ST1
	SRM_SRS_ST2
	SRM_SRS_ST3
	SRM_SRS_ST4
	SRM_SUPPLIER_ST
	SRM_SRS_VISION
Strategy Tree	GR_SRS_STRATEGY
	SRM_SRS_STRATEGY
	SRM_SRS_SUPPLIER
Strategy and KPI trees:	SRM_BUYER_SCORECRD: SRM_SRS_STRATEGY - Supplier Rating System.
	SRM_SUPPLIER_SCRCD: SRM_SRS_SUPPLIER - SRM Supplier Scorecard for SRS.

KPIs

A KPI defines the data value or calculation from the PeopleSoft EPM database that is evaluated to determine how well an organization is meeting its critical success factors.

Supplier Rating System delivers a set of preconfigured KPIs that provide executive and middle management with the tools to analyze supplier performance. These KPIs have been developed in conjunction with leading consultants to:

- Reduce purchasing cost.
- Reduce lead-time variability.
- Improve invoice accuracy.
- Improve supplier quality.
- Provide buyer feedback ratings.
- Provide supplier financial ratings.

The delivered KPIs use a naming convention: All the KPI IDs begin with *SRM_*. They use an object type of *Supplier* that uses data from inventory, purchasing, receiving, and voucher tables.

Supplier Rating System includes preconfigured KPIs that are designed specifically for use with Dun & Bradstreet data. This table lists KPIs and explains what each measures:

KPI Name	***What It Measures***
Credit Score	A statistically modeled score predicting the business establishment's probability of delinquent payment within the next 12 months. The score is derived from various Dun & Bradstreet data, including payment history, credit rating, year started, Standard Industry Code (SIC), and other data. The score range is from 0 to 100. The higher the credit score, the lower the probability of delinquency. See your configured risk thresholds for mapping to risk categories.
Current Paydex	A two-digit score, exclusive to Dun & Bradstreet, that appraises the payment history of a company. This index is derived from the currency-weighted average of the combined individual payment experiences of a company.
Current Ratio	A measure of short-term solvency: the ability of the supplier to pay its liabilities on time. Current Ratio = Current Assets / Current Liabilities. Current Assets: The current value of a business including property, cash, and so on. Current Liabilities: The current debts outstanding of a business.
Dun & Bradstreet Rating	A general classification based on estimated strength and composite credit appraisal. The first two positions represent the net worth of the company. The last position is the composite credit appraisal that is assigned to the company by Dun & Bradstreet's business analyst. These are the four composite credit appraisals: 1 = High, 2 = Good, 3 = Fair, 4 = Limited.
Debt to Equity Ratio	Total Debt / Net Worth. Total Debt: The total of debt that is incurred by a business. Net Worth: The net worth or equity of the business.
Financial Stress Percentile	The incidence of financial stress is the proportion of firms with scores in this range that discontinued operations with loss to creditors. The financial stress percentage for a specific class is based on historical data in the Dun & Bradstreet file.
Financial Stress Percentile - Average incidence	The incidence of financial stress is the proportion of firms with scores in this range that discontinued operations with loss to creditors. The national average incidence of financial stress is based on historical data in Dun & Bradstreet files.
Financial Stress Percentile - Industry	The relative rating of a company among all of the scorable companies in its own industry group.
Financial Stress Percentile - Industry Incidence	The proportion of firms with scores in this range that discontinued operations with loss to creditors. The industry-specific average incidence of financial stress is based on historical data in Dun & Bradstreet files.

KPI Name	***What It Measures***
Financial Stress Percentile - National	The relative rating of a company among all of the scorable companies.
Financial Stress Score	A statistically valid score predicting the potential for failure of a business establishment and the likelihood that a company will obtain legal relief from creditors in full over the next 18 months. Branch records are populated from the headquarters record.
Net Sales to Assets	Sales Volume / Total Assets. Sales Volume: The value of the sales of a company for a 12-month period. Total Assets: The total value of cash and property of a business.
Supplier Evaluation Risk Score	Predicts the likelihood of a firm ceasing operations without paying all creditors under state or federal law over the next 18 months. The score, which is on a 1 (lower risk) to 9 (higher risk) scale, uses statistically valid models that are derived from the Dun & Bradstreet extensive data files. Information such as age of business, payment trends and performance, financial ratios compared with industry averages, sales and profitability, and so on, are considered in the calculation of the supplier evaluation risk score. Branch records are populated from the headquarters record.
Working Capital to Assets	(Current Assets – Current Liability) / Total Assets. Total Assets: The total value of cash and property of a business. Current Assets: The current value of a business, including property, cash, and so on. Current Liabilities: The current debts outstanding of a business.

The supplier rating models enable you to group and weigh key measures of supplier performance into performance categories that are subsequently weighted and grouped into an overall composite supplier score. The score is then compared to a rating scale and assigned a rating, much like a report card in school or automobile crash test ratings from the federal government. The following table shows an example supplier rating for Acme, Inc. The following rating (assessment) rules apply for this example: A >= 90, B>= 80, C >= 70, D >= 60, F <= 59.

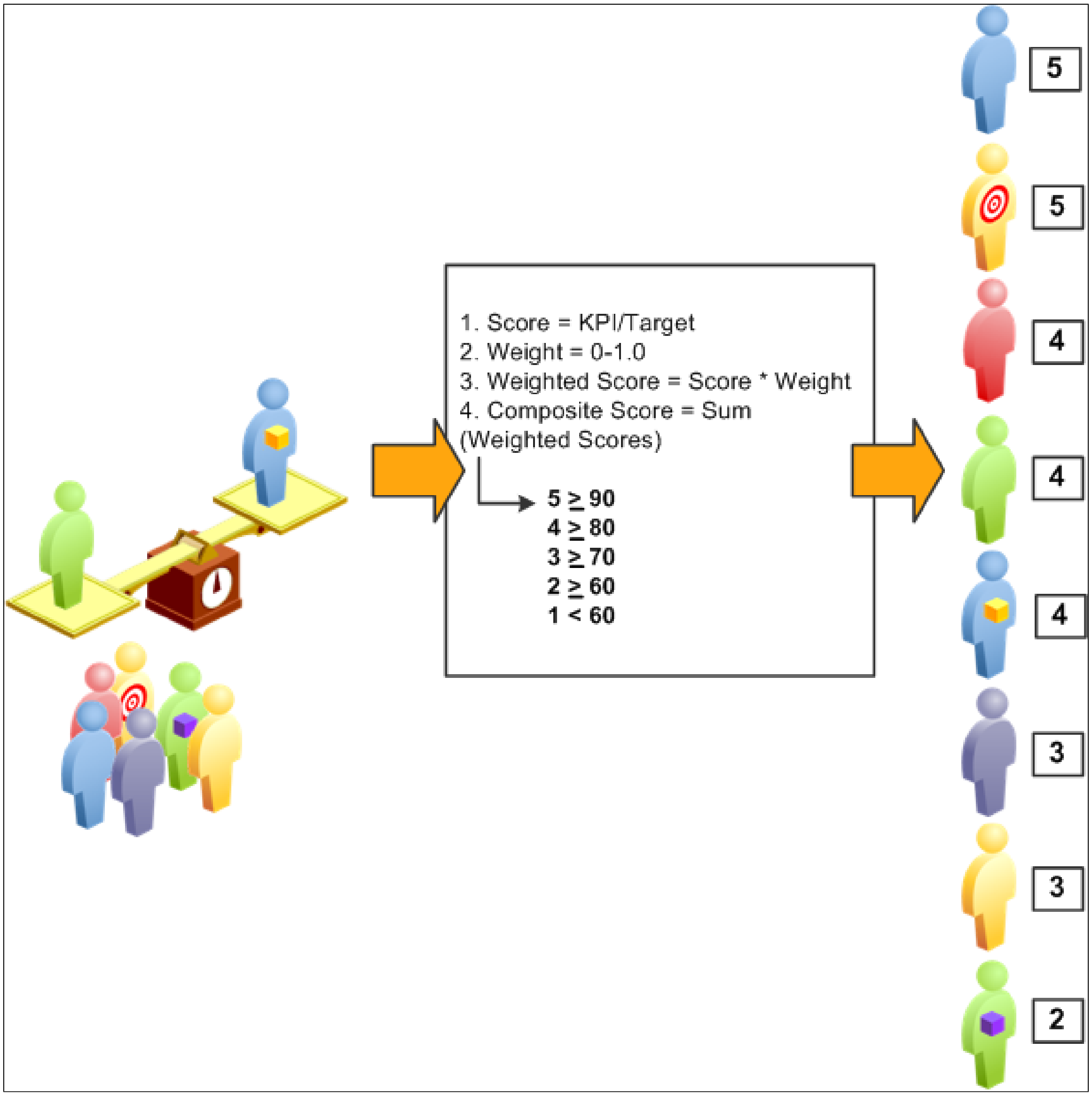
Category	***Desc.***	***Attribute***	***Weight***	***Value***	***Target***	***Score***	***Rating***
C1	Acme, Inc.			83		83	B
CKPI1(Composite KPI)	Shipment accuracy	Higher is better	.30	89	90	99	A

Category	***Desc.***	***Attribute***	***Weight***	***Value***	***Target***	***Score***	***Rating***
CKPI1 is a composite of these KPIs:							
KPI1	Shipped quantity	Higher is better	.50	900	1000	90	A
KPI2	Shipped quantity correct	Higher is better	.30	92	98	94	A
KPI3	Under shipped quantity	Lower is better	.10	5	3	60	D
KPI4	Over shipped quantity	Lower is better	.10	0	1	100	A
CKPI2	Quality performance	Higher is better	.50	62	90	69	D
CKPI2 is a composite of these KPIs:							
KPI5	Accepted % of shipped quantity	Higher is better	.50	80%	95%	84	B
KPI6	Returned % of shipped quantity	Lower is better	.50	5%	2%	40	F
CKPI3	On time performance	Higher is better	.20	88	95	93	A
CKPI3 is a composite of these key KPIs:							
KPI7	% of shipments on time	Higher is better	.80	78%	90%	87	B
KPI8	% of shipments early	Lower is better	.05	4%	5%	125	A
KPI9	% of shipments late	Lower is better	.15	6%	5%	83	B

This figure illustrates KPI calculations:

Image: KPI calculations

KPI calculations



Batch Processes

You must run the following jobstreams to populate key tables:

- KP_ANALYZE

  This jobstream populates KP_KPI_CALC_F00 and KP_KPI_ASMT_F00. Run this jobstream to validate the KPI calculation rules, verify end values, and test the KPI assessment rules.

- BC_ANALYZE

This jobstream populates KP_KPI_CALC_F00, KP_KPI_ASMT_F00, and BC_ASSESS_F00. Run this jobstream to generate the final scorecard assessments after you validate your setup (by running KP_ANALYZE). If you set up this job to run regularly, the KPI process can aggregate data month-to-month and year-to-date. You must run this process after you populate or update the PeopleSoft EPM warehouse tables (such as during the Extract Transform and Load (ETL) process) to view current results for your Supplier Rating System Scorecard.

Related Links

Understanding KPI and Scorecard Processing

Understanding Scorecard Summary

The tables in this topic contain the summary information for the KPIs that make up the Supplier Rating – Buyer and Supplier Scorecards. In addition to the KPI description and related critical success factor, these summary tables include the dimension or object type, perspective, and KPI calculation definition.

Reduce Purchasing Cost KPIs

This table contains the summary information for KPIs for which critical success factor is Reduce Purchasing Cost.

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
% Freight ($)	Supplier	Internal	The % of freight value associated with a purchase order (PO) last period.
% Ordered ($) Under Contract	Supplier	Internal	The % of value of units ordered on a PO for which a contract exists last period.
% Change in Average PO Price	Supplier	Internal	The % difference in the average PO price between this period and last period.
Average PO Price Variance	Supplier	Internal	The difference between average PO price between this period and last period.
Freight ($)	Supplier	Internal	The freight value associated with a PO.
Ordered ($)	Supplier	Internal	The value of units ordered on a PO.
Ordered ($) Under Contract	Supplier	Internal	The value of units ordered on a PO for which a contract exists.
Average PO Price ($)	Supplier	Internal	The average PO price for a supplier for that period.

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
Average PO Price ($) (Last)	Supplier	Internal	The average PO price for a supplier for that period (last period).

Reduce Lead Time Variability KPIs

This table contains the summary information for KPIs for which critical success factor is Reduce Lead Time Variability.

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
% of Rcpts (receipts) On-Time	Supplier	Internal	The % of supplier PO shipments for which delivery status = *On Time'*
% of Rcpt Qty (quantity) Correct	Supplier	Internal	The % of the value of the units shipped against a PO for which the completion status = *Correct.*
# of Rcpts	Supplier	Internal	The number of supplier PO shipments for the period.
# of Rcpts Early	Supplier	Internal	The number of supplier PO shipments for which delivery status = *Early.*
# of Rcpts Late	Supplier	Internal	The number of supplier PO shipments for which delivery status = *Late.*
# of Rcpts On-Time	Supplier	Internal	The number of supplier PO shipments for which delivery status = *On Time.*
% of Rcpts Early	Supplier	Internal	The % of the number of supplier PO shipments for which delivery status = *Early.*
% of Rcpts Early (% Chg [change])	Supplier	Internal	The % change of the number of supplier PO shipments since last period for which delivery status = *Early.*
% of Rcpts Late	Supplier	Internal	The % of the number of supplier PO shipments for which delivery status = *Late.*
% of Rcpts Late (% Chg)	Supplier	Internal	The % change of the number of supplier PO shipments since last period for which delivery status = *Late.*

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
% of Rcpts On-Time (% Chg)	Supplier	Internal	The % change of the number of supplier PO shipments since last period for which delivery status = *On Time.*
Average # of days early	Supplier	Internal	The average number of days that a supplier's shipments arrived early.
# of Rcpt Qty	Supplier	Internal	The number of units received from a supplier for a period.
# of Overshipped Qty	Supplier	Internal	The number of units received on a PO for which completion status = *Overshipped.*
# of Rcpt Qty Correct	Supplier	Internal	The number of units shipped against a PO for which the completion status = *Correct.*
# of Rcpts On-Time and Correct	Supplier	Internal	The number of supplier PO shipments for which delivery status = *On Time*and for which completion status = *Correct.*
# of Undershipped Qty	Supplier	Internal	The number of units received on a PO for which completion status = *Undershipped.*
% Overshipped Qty	Supplier	Internal	The % of the number of units received on a PO for which completion status = *Overshipped.*
% Overshipped Qty (% Chg)	Supplier	Internal	The % change of the number of units received on a PO since last period for which completion status = *Overshipped.*
% Qty Correct (% Chg)	Supplier	Internal	The % change of the value of the units shipped against a PO since last period for which the completion status = *Correct.*
% On-Time and Correct	Supplier	Internal	The % difference in the number of supplier PO shipments for which delivery status = *On Time* and for which completion status = *Correct* and the number of supplier purchase order shipments.

KPI Name	***Dimension (Object Type)***	***Perspective***	***KPI Calculation***
% On-Time and Correct (% Chg)	Supplier	Internal	The % change in the number of supplier PO shipments for which delivery status = *On Time* and for which completion status = *Correct* since last period.
% Undershipped Qty	Supplier	Internal	The % of the number of units received on a PO for which completion status = *Undershipped.*
% Undershipped Qty (% Chg)	Supplier	Internal	The % change of the number of units received on a PO since last period for which completion status = *Undershipped.*
# of Rcpts (Last)	Supplier	Internal	The number of supplier PO shipments for the period (last period).
# of Rcpts Early (Last)	Supplier	Internal	The number of supplier PO shipments for which delivery status = *Early* (last period).
# of Rcpts Late (Last)	Supplier	Internal	The number of supplier purchase order shipments for which delivery status = *Late* (last period).
# of Rcpts On-Time (Last)	Supplier	Internal	The number of supplier purchase order shipments for which delivery status = *On Time* (last period).
# of Rcpt Qty (Last)	Supplier	Internal	The number of units received from a supplier for a period (last period).
# of Overshipped Qty (Last)	Supplier	Internal	The number of units received on a PO for which completion status = *Overshipped* (last period).
# of Rcpt Qty Correct (Last)	Supplier	Internal	The number of units shipped against a PO for which the completion status = *Correct* (last period).
# of Rcpts On-Time & OK (Last)	Supplier	Internal	The number of supplier PO shipments for which delivery status = *On Time* and for which completion status = *Correct* and the number of supplier PO shipments (last period).

KPI Name	Dimension (Object Type)	Perspective	KPI Calculation
# of Undershipped Qty (Last)	Supplier	Internal	The number of units received on a PO for which completion status = *Undershipped* (last period).
Average # of days late	Supplier	Internal	The average number of days that a supplier's shipments arrived late.

Improve Invoice Accuracy KPIs

This table contains the summary information for KPIs for which critical success factor is Improve Invoice Accuracy.

KPI Name	Dimension (Object Type)	Perspective	KPI Calculation
% Invoiced Correctly	Supplier	Internal	The % of vouchers for which PO price and voucher price are the same.
% Over Invoiced ($)	Supplier	Internal	The % difference in the value of units on a voucher for which voucher price is less than the PO price and the value of units on a voucher.
% Under Invoiced ($)	Supplier	Internal	The % difference in the value of units on a voucher last period for which voucher price is less than the PO price and the value of units on a voucher.
Purchase Price Variance ($)	Supplier	Internal	The sum of over invoiced ($) and under invoiced ($).
# of Vouchers Over Invoiced	Supplier	Internal	The number of vouchers for which the PO unit price is less than the voucher unit price.
Invoiced Correctly ($)	Supplier	Internal	The number of vouchers for which PO price and voucher price are the same.
Over Invoiced ($)	Supplier	Internal	The sum of the difference in the value of units on a voucher and value of units on a PO for which voucher price is more than the PO price.

KPI Name	Dimension (Object Type)	Perspective	KPI Calculation
Under Invoiced ($)	Supplier	Internal	The sum of the difference in the value of units on a voucher and value of units on a PO for which voucher price is less than the PO price.
# of Vouchers Under Invoiced	Supplier	Internal	The number of vouchers for which the voucher unit price is less than the PO unit price.

Improve Supplier Quality KPIs

This table contains the summary information for KPIs for which critical success factor is Improve Supplier Quality.

KPI Name	Dimension (Object Type)	Perspective	KPI Calculation
% of Rcpt Qty Accepted	Supplier	Internal	The % of the number of units accepted against a PO for which accepted quantity is the quantity remaining after rejects and returns.
# of Rcpt Qty Accepted	Supplier	Internal	The number of units accepted against a PO for which accepted quantity is the quantity remaining after rejects and returns.
# of Rcpt Qty Rejected	Supplier	Internal	The number of units rejected against a PO.
# of Rcpt Qty Returned	Supplier	Internal	The number of units returned against a PO.
% of Rcpt Qty Accepted (% Chg)	Supplier	Internal	The % change of the number of units accepted against a PO since last period for which accepted quantity is the quantity remaining after rejects and returns.
% of Rcpt Qty Rejected	Supplier	Internal	The % of the number of units rejected against a PO.
% of Rcpt Qty Rejected (% Chg)	Supplier	Internal	The % change of the number of units rejected against a PO since last period.
% of Rcpt Qty Returned	Supplier	Internal	The % of the number of units returned against a PO.

KPI Name	Dimension (Object Type)	Perspective	KPI Calculation
% of Rcpt Qty Returned (% Chg)	Supplier	Internal	The % change of the number of units returned against a PO since last period.
# of Rcpt Qty Accepted (Last)	Supplier	Internal	The number of units accepted against a purchase order for which accepted quantity is the quantity remaining after rejects and returns (last period).
# of Rcpt Qty Rejected (Last)	Supplier	Internal	The number of units rejected against a PO (last period).
# of Rcpt Qty Returned (Last)	Supplier	Internal	The number of units returned against a PO (last period).

Buyer Feedback Ratings KPIs

This table contains the summary information for KPIs for which critical success factor is Buyer Feedback Ratings.

KPI Name	Dimension (Object Type)	Perspective	KPI Calculation
Quality of Customer Service	Supplier	Internal	N/A
Quality of Relationship	Supplier	Internal	N/A
Responsiveness to Changes	Supplier	Internal	N/A
Responsiveness to Problems	Supplier	Internal	N/A
Timely Issue Notification	Supplier	Internal	N/A
Value to our Company	Supplier	Internal	N/A
Value to the Supplier	Supplier	Internal	N/A

Supplier Financial Ratings KPIs

This table contains the summary information for KPIs for which critical success factor is Supplier Financial Ratings.

KPI Name	Dimension (Object Type)	Perspective	KPI Calculation
Credit Score	Supplier	Internal	SRM - Dun & Bradstreet credit score for the Supplier Rating System.

KPI Name	Dimension (Object Type)	Perspective	KPI Calculation
Current Paydex	Supplier	Internal	SRM - Dun & Bradstreet payed score for the Supplier Rating System.
Current Ratio	Supplier	Internal	Measure of short-term solvency. The ability of the supplier to pay its liabilities on time.
Dun & Bradstreet Rating	Supplier	Internal	SRM - Dun & Bradstreet rating for the Supplier Rating System.
Debt to Equity Ratio	Supplier	Internal	Total Debt / Net Worth. • Total debt is the total of debt incurred by a business. • Net worth is the net worth or equity of the business.
Financial Stress Percentile	Supplier	Internal	Financial Stress %.
Fin. Stress % - Average (Avg) Incidence	Supplier	Internal	Financial Stress % - Average.
Fin. Stress % - Industry	Supplier	Internal	Financial Stress Industry.
Fin. Stress % - Ind. Incidence	Supplier	Internal	Financial Stress % - Industry.
Fin. Stress % - National	Supplier	Internal	Financial Stress National.
Financial Stress Score	Supplier	Internal	Financial Stress Score.
Net Sales to Assets	Supplier	Internal	Sales Volume / Total Assets. • Sales volume is the value of a company's sales for a 12-month period. • Total assets is the total value of cash and property of a business.
Supplier Evaluation Risk Score	Supplier	Internal	Dun & Bradstreet global failure risk score.
Working Capital to Assets	Supplier	Internal	(Current Assets - Current Liability) / Total Assets

Delivered KPIs

Details about the delivered KPIs are provided in the SRSKPIS.PDF file that is located in the documentation. This file provides information about each of the delivered predefined KPIs by means of summary and detail tables. Use these tables to better understand Supplier Rating System Scorecard calculations. You can also use the information in these tables as a basis for altering the scorecard to update KPIs and target rules.

Prerequisites

Load the predefined data components that are required for Scorecard by running a DMS script when you install the application.

See *PeopleSoft EPM Installation* product documentation.

Setting Up and Using Supplier Rating System Scorecard

To use Supplier Rating System, you must first set up PeopleSoft EPM and Enterprise Scorecard. You can also optionally integrate Dun & Bradstreet data.

This topic discusses how to:

- Set up PeopleSoft EPM and Enterprise Scorecard.
- Integrate Dun & Bradstreet data.

Setting Up PeopleSoft EPM and Enterprise Scorecard

The predefined data components that make up Supplier Rating System are delivered separately from the Scorecard application. These components are delivered at the time of installation. After the database is installed at your site, setting up and accessing Supplier Rating System involves setting up PeopleSoft EPM, populating the warehouse, updating several components of Scorecard, and populating the final reporting tables.

Note: Before you begin setting up Supplier Rating System, you must install the appropriate components using the installation documentation, and move the appropriate data components to your system database.

The predefined data components as delivered are set up to run with a specific business unit, SetID, model ID, scenario ID, and so on. PeopleSoft delivers all of the appropriate security and object IDs as sample data. If you install Supplier Rating System to a demo database, you can acquaint yourself with the functionality in a demo environment.

After you set up PeopleSoft EPM and Enterprise Scorecard, you must:

1. Run the ETL process to populate PeopleSoft EPM with the data that is related to the PeopleSoft Supply Chain Warehouse and PeopleSoft FMS Warehouse.

2. Run the KP_ANALYZE and BC_ANALYZE processes to populate key tables.

When these steps are complete, you can view the scorecards and use the PeopleSoft Business Interface.

Related Links

Understanding KPI and Scorecard Processing
Understanding the Scorecard and KPI Monitoring Pages

Integrating Dun & Bradstreet Data

Integration of Dun & Bradstreet data is optional for subscribers to Dun & Bradstreet who want to use data about suppliers (suppliers) with Supplier Rating System KPIs. You can use the additional data from Dun & Bradstreet in the preconfigured Supplier Rating System KPIs to assist with the assessment of supplier stability and quality.

To integrate Dun & Bradstreet data:

1. Run the ETL process.

   This process uses ETL maps to move operational data into the Operational Warehouse Staging (OWS), and then into the data warehouse tables.

2. Load imported data into a text file.

   Data is extracted in the form of a text file from the OWS and data warehouse tables so that additional information can be integrated into the Dun & Bradstreet process.

3. Run the DB_EXP Application Engine process to export data into the text file so that Dun & Bradstreet can use this text file to run the Global Batch process.

4. Run the Dun & Bradstreet Global Batch process, which adds Dun & Bradstreet data to the text file.

5. Import the text file (after the Global Batch process finishes) into PeopleSoft EPM.

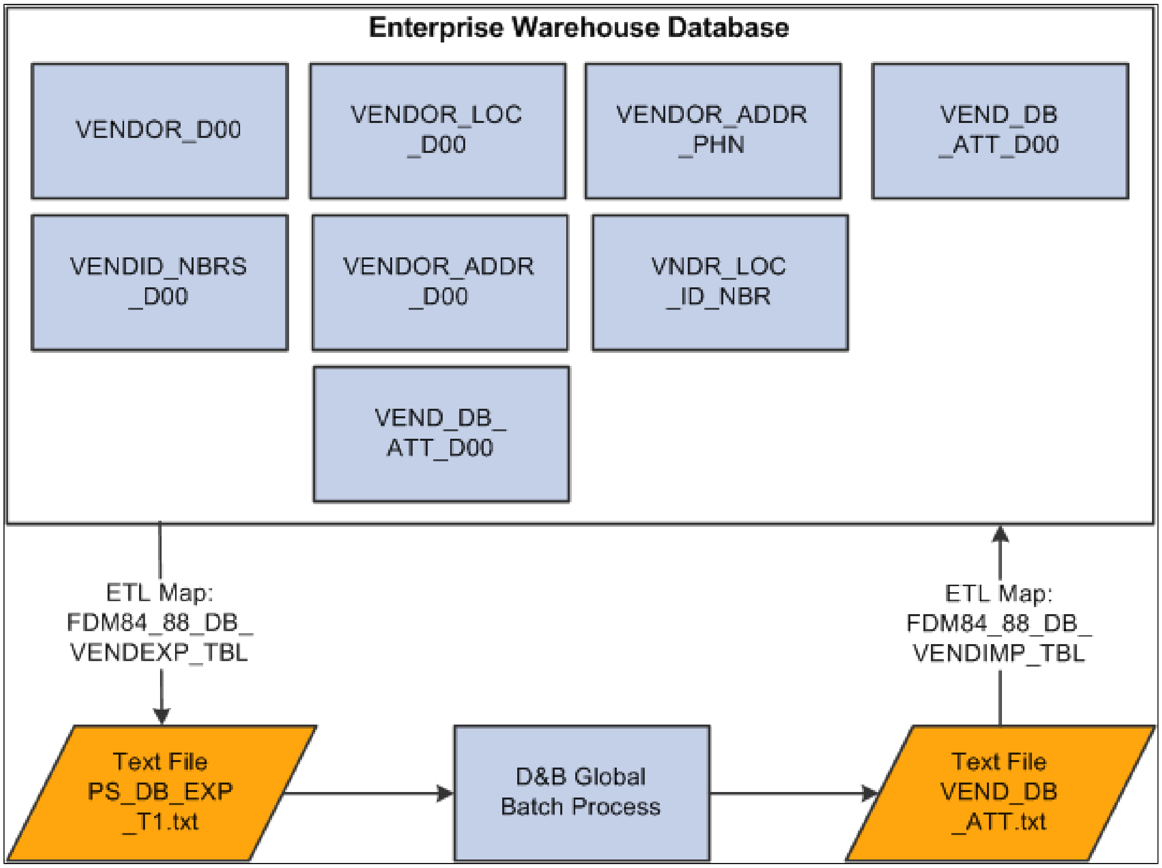
   After the Global Batch process is run, the system uses ETL to import another text file, which includes the Dun & Bradstreet data, back into PeopleSoft EPM.

The integration process is a destructive load. Users typically run the integration process on a weekly, monthly, or quarterly basis.

This diagram shows the general data flow of data when you are using the Dun & Bradstreet Global Batch process. The Global Batch process is run outside your PeopleSoft system, within the Dun & Bradstreet system. The resulting added data is integrated into PeopleSoft EPM, where it is available for use in Supplier Rating System:

Image: Dun & Bradstreet integration flowDun & Bradstreetintegration flow with Supplier Rating System

Dun & Bradstreet integration flowDun & Bradstreetintegration flow with Supplier Rating System



This table lists the OWS tables, ETL maps, and folders that are used to integrate with Dun & Bradstreet:

OWS Table Names	***ETL Map***	***Folder Information***	***ETL Map Function***	***Data Loader Map***
VENDOR	FDM84_84_VENDOR	FDM84_88	Loads supplier information from source to OWS.	VENDOR_D00
VENDOR_ADDR	FDM84_84_VENDOR _ADDR	FDM84_88	Loads supplier address information from source to OWS.	VENDOR_ADDR_ D00
VENDOR_ID_NBRS	FDM84_84_VENDID_ NBRS_TBL	FDM84_88	Loads additional supplier information from source to OWS.	VENDID_NBRS_D00
VENDOR_LOC	FDM84_84_VENDOR _LOC	FDM84_88	Loads supplier location information from source to OWS.	VENDOR_LOC_D00

OWS Table Names	***ETL Map***	***Folder Information***	***ETL Map Function***	***Data Loader Map***
VENDOR_ADDR_ PHN	FDM84_88_VENDOR _ADDR_PHN	FDM84_88	Loads supplier phone information from source to OWS.	
VNDR_LOC_ID_NBR	FDM84_84_VNDR_ LOC_ID_NBR	FDM84_88	Loads supplier plus DUNS information from source to OWS.	
	FDM84_84_DB_ VENDEXP_TBL.XML		Loads supplier information from PeopleSoft Enterprise Performance Management (PeopleSoft EPM) in a txt file format to be used by the Dun & Bradstreet Global Batch process.	
	FDM84_84_DB_ VENDIMP_TBL.XML		Loads supplier information from the Dun & Bradstreet Global Batch process in a txt file format to be used by PeopleSoft EPM.	

This table lists the PeopleSoft files that are used along with the Dun & Bradstreet fields. The first 17 rows are fields that PeopleSoft exports in the text file. Rows 18 to 134 are rows with data that is inserted after the Global Batch process has run:

Image: Rows 1–17 delivered by PeopleSoft

Rows 1–17 delivered by PeopleSoft

PeopleSoft Dun &Bradstreet ® Global Batch Data Append Layouts

Sequence Number	D&B Element Name	Size	Position		Element Description as per Layout
			Beginning	End	
1	SETID	5	1	5	PeopleSoft Identifier SET ID
2	VENDOR_ID	20	6	25	PeopleSoft Identifier VENDOR_ID
3	STD_ID_NUM	20	26	45	PeopleSoft Identifier STD_ID_NUM
4	NAME1	40	46	85	Name1
5	NAME2	40	86	125	Name2
6	EMAILID	70	126	195	e-mail ID
7	COUNTRY	3	196	198	Country Code
8	ADDRESS1	55	199	253	Address 1
9	ADDRESS2	55	254	308	Address 2
10	ADDRESS3	55	309	363	Address 3
11	ADDRESS4	55	364	418	Address 4
12	CITY	30	419	448	City
13	COUNTY	30	449	478	County
14	STATE	6	479	484	State
15	POSTAL	12	485	496	Postal Code
16	PHONE NUMBER	16	497	512	Phone Number
17	D&B D-U-N-S	11	513	523	D&B D-U-N-S Number in PeopleSoft application

Image: Rows 18–43 populated by Dun & Bradstreet

Rows 18–43 populated by Dun & Bradstreet

18	D&B D-U-N-S	11	524	534	D&B D-U-N-S Number
19	NAME	90	535	624	Business Name
20	TRDSTY1	90	625	714	Trade Style/Secondary Name
21	REG_ADDR	1	715	715	Registered Address Indicator
22	ADDR	64	716	779	Physical Address
23	ADDR2	64	780	843	Second Physical Address
24	CITY	30	844	873	Physical City
25	STATENM	30	874	903	Physical State Name
26	CNTRYNM	20	904	923	Physical Country Name
27	CITY_CD	6	924	929	Physical City Code
28	CNTY_DB	3	930	932	County Code
29	STAT_DB	3	933	935	State/Province Code
30	STATE	4	936	939	State/Province Abbreviation
31	CNTRY_CD	3	940	942	DB Country Code
32	ZIP	9	943	951	Postal Code for Street Address
33	CONT_CD	1	952	952	Continent Code
34	MAILADDR	32	953	984	Mailing Address
35	MAILCITY	30	985	1014	Mailing City Name
36	CNTYDBN	30	1015	1044	Mailing County Name
37	MSTATENM	30	1045	1074	Mailing State/Province Name
38	MCNTRYNM	20	1075	1094	Mailing Country Name
39	MCITY_CD	6	1095	1100	Mailing City Code
40	MCNTY_DB	3	1101	1103	Mailing County Code
41	MSTAT_DB	3	1104	1106	Mailing State/Province Code
42	MAILST	4	1107	1110	Mailing State/Province Abbrev
43	MCNTRYCD	3	1111	1113	Mailing Country Code

Image: Rows 44–69 populated by Dun & Bradstreet

Rows 44–69 populated by Dun & Bradstreet

44	MAILZIP	9	1114	1122	Mailing Postal Code
45	MCONT_CD	1	1123	1123	Mailing Continent Code
46	NATL_ID	16	1124	1139	National Identification
47	NIS_CODE	5	1140	1144	National Identification System
48	PHONE_CD	4	1145	1148	Country Telephone Access Code
49	PHONE	16	1149	1164	Telephone Number
50	CABLTELX	16	1165	1180	Cable/Telex Number
51	FAX	16	1181	1196	Fax Number
52	CEO_NAME	60	1197	1256	CEO Name
53	CEO_TITL	60	1257	1316	CEO Title
54	LOB	41	1317	1357	Line of Business
55	SIC10	4	1358	1361	U.S. 1987 SIC 1
56	SIC20	4	1362	1365	U.S. 1987 SIC 2
57	SIC30	4	1366	1369	U.S. 1987 SIC 3
58	SIC40	4	1370	1373	U.S. 1987 SIC 4
59	SIC50	4	1374	1377	U.S. 1987 SIC 5
60	SIC60	4	1378	1381	U.S. 1987 SIC 6
61	ACTIV_CD	8	1382	1389	Primary Local Activity Code
62	ACTIVIND	3	1390	1392	Activity Indicator
63	YRSTART	4	1393	1396	Year Started
64	SALE_LOC	18	1397	1414	Annual Sales Local
65	SALES_CD	1	1415	1415	Annual Sales Indicator
66	SALES	15	1416	1430	Annual Sales in U.S. Dollars
67	CURR_CD	4	1431	1434	Currency Code
68	EMPHERE	7	1435	1441	Employees Here
69	EMPH_CD	1	1442	1442	Employees Here Indicator

Image: Rows 70–95 populated by Dun & Bradstreet

Rows 70–95 populated by Dun & Bradstreet

70	EMPTOTL	7	1443	1449	Employees Total
71	EMPT_CD	1	1450	1450	Employees Total Indicator
72	INC_PRIN	1	1451	1451	Include Principle
73	IMPORT_G	1	1452	1452	Import/Export/Agent Indicator
74	LGL_STAT	3	1453	1455	Legal Status
75	CNTRLIND	1	1456	1456	Control Indicator
76	STATUS_G	1	1457	1457	Global Status Code
77	SUBSID	1	1458	1458	Subsidiary Code
78	PREV_DUN	11	1459	1469	Previous D&B D-U-N-S Number
79	RPRT_DAT	8	1470	1477	Report Date
80	HQPRD&B D-U-N-S	11	1478	1488	Headquarter/Parent D&B D-U-N-S Number
81	HP_NAME	90	1489	1578	Headquarter/Parent Name
82	HP_ADDR	64	1579	1642	Headquarter/Parent Address
83	HP_CITY	30	1643	1672	Headquarter/Parent City
84	HP_STATE	30	1673	1702	Headquarter/Parent State
85	HP_CNAME	20	1703	1722	Headquarter/Parent Country Nam
86	HP_CTYCD	6	1723	1728	Headquarter/Parent City Code
87	HP_CNTCD	3	1729	1731	Headquarter/Parent County Code
88	HP_STABB	4	1732	1735	HDQ/PAR State/Province Abbrev.
89	HDQPARCD	3	1736	1738	HDQ/PARENT Country Code
90	HP_ZIP	9	1739	1747	Headquarter/Parent Postal Code
91	HP_CONCD	1	1748	1748	HDQ/PARENT Continent Code
92	ULTD&B D-U-N-SD	11	1749	1759	Domestic Ultimate D&B D-U-N-S Number
93	DU_NAME	90	1760	1849	Domestic Ultimate Name
94	DU_ADDR	64	1850	1913	Domestic Ultimate Address
95	DU_CITY	30	1914	1943	Domestic Ultimate City

Image: Rows 96–118 populated by Dun & Bradstreet

Rows 96–118 populated by Dun & Bradstreet

96	DU_STATE	30	1944	1973	Domestic Ultimate State
97	DU_CTYCD	6	1974	1979	Domestic Ultimate City Code
98	DU_CNTCD	3	1980	1982	Domestic Ultimate Country Code
99	DU_STABB	4	1983	1986	Domestic Ultimate State Abbrev
100	DU_ZIP	9	1987	1995	Domestic Ultimate Zip
101	ULT_IND	1	1996	1996	Global Ultimate Indicator
102	ULT_D&B D-U-N-S	11	1997	2007	Global Ultimate D&B D-U-N-S Number
103	GU_NAME	90	2008	2097	Global Ultimate Name
104	GU_ADDR	64	2098	2161	Global Ultimate Address
105	GU_CITY	30	2162	2191	Global Ultimate City
106	GU_STATE	30	2192	2221	Global Ultimate State
107	GU_CNAME	20	2222	2241	Global Ultimate Country Name
108	GU_CTYCD	6	2242	2247	Global Ultimate City Code
109	GU_CNTCD	3	2248	2250	Global Ultimate County Code
110	GU_STABB	4	2251	2254	Global Ultimate State Abbrev.
111	UCNTRYCD	3	2255	2257	Global Ultimate Country Code
112	GU_ZIP	9	2258	2266	Global Ultimate Zip Code
113	GU_CONCD	1	2267	2267	Global Ultimate Continent Code
114	GLFAMMEM	5	2268	2272	Number of Global Family Member
115	DIAS_CDI	9	2273	2281	Global DIAS Code
116	HIERCHYI	2	2282	2283	Global Hierarchy Code
117	FAMUPDTE	8	2284	2291	Family Update Date
118	USERAREA	16	2292	2307	User Area

Image: Rows 119–129 populated by Dun & Bradstreet

Rows 119–129 populated by Dun & Bradstreet

119	D&B CREDIT SCORE	3	2308	2310	The Credit (Delinquency) Score is a statistically modeled D&B Score indicating the risk of delinquent payments based on the information in D&B's file.
120	D&B CURRENT PAYDEX	3	2311	2313	D&B® Paydex® e for last 12 months experiences
121	A) D&B RATING	5	2314	2318	Rating assigned by Dun & Bradstreet
	(*)B) D&B RATING				
122	D&B SER SCORE	1	2319	2319	Indicates risk of business default within 18 months. 1=lower risk, 9=highest risk
123	FINANCIAL STRESS SCORE	4	2320	2323	D&B's Financial Stress Score predicts the probability of severe financial distress or failure.
124	FINANCIAL STRESS SCORE - NATIONAL PERCENTILE	3	2324	2326	National percentile reflects the relative ranking of a company among all the scorable companies in the local country database.
125	FINANCIAL STRESS SCORE - INDUSTRY PERCENTILE RANK	3	2327	2329	Industry percentile reflects the relative ranking of a company among all the scorable companies in that industry.
126	FINANCIAL STRESS SCORE INCIDENCE OF DEFAULT - NATIONAL	3	2330	2332	The incidence of financial stress is the proporation of firms with scores in this range that discontinued operations w/ loss to creditors, National Average.
127	FINANCIAL STRESS SCORE INCIDENCE OF DEFAULT - INDUSTRY	3	2333	2335	The incidence of financial stress is the proporation of firms with scores in this range that discontinued operations w/ loss to creditors, this is industry specific.
128	TOTAL CURRENT ASSETS	26	2336	2361	Total amount of all current assets
129	TOTAL ASSETS	26	2362	2387	Total amount of current and long-term assets

Image: Rows 130–134 populated by Dun & Bradstreet

Rows 130–134 populated by Dun & Bradstreet

130	TOTAL CURRENT LIABILITIES	26	2388	2413	Total amount of all current liabilities.
131	TOTAL LIABILITIES	26	2414	2439	Total liabilities owed by business.
132	NET WORTH	26	2440	2465	Total amount of Equity (Net Worth) Includes capital stock, retained earnings treasury stock, etc
133	TOTAL DEBT	26	2466	2491	User Area
134	USER AREA	28	2492	2519	Total amount of Equity (Net Worth) Includes capital stock, retained earnings treasury stock, etc

Chapter 13

Database Objects

Fact Tables

This table lists the fact tables that are used in PeopleSoft Scorecard, with a description of the data they contain:

Fact Tables	*Type of Data*
BC_ASSESS_F00	Stores scorecard assessment results.
BC_COMMENTS_F00	Stores scorecard comments.
BC_COMMENTS_S00	Stores comments and approval status.
BC_PRSPCTV_F00	Stores perspective assessments.
KP_DATAVALS_F00	Stores KPI Data Element values.
KP_KPI_ASMT_F00	Stores KPI assessment results.
KP_KPI_CALC_F00	Stores calculated KPI values.
KP_KPI_OVRD_F00	Stores KPI assessment override information.
KP_OBJ_RULE_F00	Stores KPI dimension members, when they are defined by a rule.
KP_TRGTVALS_F00	Stores KPI target values.
KP_KPI_NODE_F00	Stores hierarchical KPI tree fact data and data that describes the relationship between a KPI and the associated tree.
KP_KPI_NODE_S00	Stores hierarchical KPI node-level values.
KP_KPI_DSCR_F00	Stores the KPI and dimension member descriptions for base language and all installed languages.

KPI Records

This table lists the database records that store KPI-related data.

Data Type	***Database Records***
Calculation Definition	KP_CALC_DFN KP_CALC_FLDS KP_CALC_LNG
Cause and Effect	KP_CAUSE_EF_LNG KP_CAUSE_EFFECT KP_KPI_CAUSE
Composite KPIs	KP_CMPSTE_EFF KP_CMPSTE_KPI
Data Element Definition	KP_DATAELEM_DFN KP_DATAELEM_LNG
KPI Calculation Rules	KP_CALC_RULE
KPI Definitions	KP_KPI_DFN KP_KPI_LNG KP_KPI_RPT KP_KPI_TREE
KPI Dimension Members	KP_KPI_OBJ KP_KPI_OBJ_EFF
KPI Families	KP_KPI_FAMILY KP_KPI_FMLY_DTL, and KP_KPI_FMLY_LNG
KPI Run Groups	KP_KPI_RUN_GRP KP_RUN_GRP_KPI KP_RUN_GRP_FY KP_RUN_GRP_RLE KP_RUN_GRP_LNG
KPI Targets	KP_KPI_TRGT_SEQ KP_KPI_TRGT_TBL KP_KPI_TRGT_TME

Data Type	***Database Records***
Manual KPIs	KP_KPI_MANL_HST KP_KPI_MANL_TBL
Target Rules	KP_OBJ_MODEL KP_OBJ_TRGT KP_TRGT_RULE

Scorecard Records

This table lists the database records that store scorecard-related data.

Data Type	***Database Records***
Portfolio Definition	BC_PORTFLIO_OBJ BC_PORT_CMP_CMP BC_PORTFLIO_COL BC_PORTFLIO_KPI BC_PORTFLIO_BSC BC_PORTFLIO_DFN BC_PORTFLIO_LNG
Scorecard Definition	BC_BSC_EXCP_DFN BC_BSC_DFN BC_BSC_LNG BC_BSC_ASMT_DIM BC_BSC_ASMT_KPI BC_BSC_DIM_DTL BC_BSC_PLIST
Scorecard Related KPIs	BC_RELATED_KPI
Strategic Initiatives	BC_COMPNT_INIT BC_ST_INIT_KPI BC_STRAT_INIT

Data Type	***Database Records***
Strategy Cause and Effect	BC_CAUSE_EFFECT BC_CAUSE_LNG BC_CSE_EFF_PRT
Strategy Components	BC_COMPONET_RPT BC_COMPONENT BC_COMPNT_LNG
Strategy KPIs	BC_COMPNT_KPI BC_CPNT_KPI_PRT

Appendix A

Delivered Workflows for PeopleSoft Scorecard

Understanding Workflow Functionality

The system provides workflow for notifications of KPI assessments when they meet the threshold set in their associated target rules, and for approvals of scorecard comments and assessment overrides.

KPI assessment notification occurs during KPI and scorecard processing. The notification is based on the activities associated with an action that is assigned to a target rule. The activities are set up by using the Activity Definition page.

Workflow can also be used for approving comments and assessment overrides. You establish whether or not to use workflow on the KPI Options page.

KPI notification workflow sends emails to individuals or to a role (such as department managers). To send emails to a role, such as managers, a public query role is used. The delivered query, which is defined and ready to use within the workflow business process, is _BSC_ROLE_QUERY. For role usage, you must define the role and then associate the role with a user ID using PeopleSoft Security.

To set up roles:

1. Navigate to PeopleTools, Security, Permissions and Roles, Roles, General.
2. Select the Members tab to assign members to a role.
3. Select the Workflow tab.
    a. Set the Workflow Routing Options field to *Use Query to Route Workflow.*
    b. Set the Query Name field to *_BSC_ROLE_QRY.*
    c. Save the page.

For comments and approval workflow processing to work, the user profile must have a supervisor ID defined, and there must be an email address for the supervisor.

To review user profiles:

1. Navigate to PeopleTools, Security, User Profiles, User Profiles, General.
2. Click the Edit Email Address link to verify the email address for the user ID.
3. Select the Workflow tab to verify that there is an email address for the Supervising User ID field.

See also *PeopleTools: Security Administration*, *PeopleTools: PeopleSoft Applications User's Guide*, and *PeopleTools: Workflow Technology*.

Related Links

Activity Definition Page

System Options Page

Target Rules Page

Delivered Workflows for KPI Notification

This topic discusses the delivered KPI Notification workflows.

Email Alert Notification for KPIs

This topic discusses the Email Alert Notification for KPIs workflow.

Email Notification

Information Type	***Description***
Event Description	This event is triggered when a KPI meets the threshold set in the Target Rules page.
Action Description	The system sends email notifications to the users or roles defined in the KPI Action page.
Notification Method	Email

Workflow Objects

Information Type	***Description***
Business Process	BSC_EMAIL_PROCESS
Activity	BSC_EMAIL_ACTIVITY
Role	MANAGER, BUSINESS ANALYSTS, USERS

Worklist Alert Notification for KPIs

This topic discusses the Worklist Alert Notification for KPIs workflow.

Worklist Notification

Information Type	***Description***
Event Description	This event is triggered when a KPI meets the threshold set in the Target Rules page.
Action Description	The system sends worklist notifications to the users or roles defined in the KPI Action page.
Notification Method	Worklist.

Workflow Objects

Information Type	***Description***
Business Process	BSC_KPI_WORKLIST_BP
Activity	BSC_KPI_WORKLIST
Role	MANAGER, BUSINESS ANALYSTS, USERS

Delivered Workflows for Comment Approvals

This topic discusses the delivered workflows for comments approval notification.

Comment Notification

This topic discusses the Comment Approvals Notification workflow.

Approval Notification

Information Type	***Description***
Event Description	This even is triggered when the Comments Approval flag is selected and a scorecard user enters a comment for a KPI.
Action Description	The system sends an email and worklist entry to the immediate manager (supervisor) of the user who entered the comment.
Notification Method	Email and worklist.

Workflow Objects

Information Type	***Description***
Business Process	BSC_COMMENT_EMAIL_PROCESS
Activity	BSC_COMMENT_EMAIL_ACTIVITY
Role	MANAGER, BUSINESS ANALYSTS, USERS

Comment Approved Workflow

This topic discusses the comment approved workflow.

Approval Notification

Information Type	***Description***
Event Description	This even is triggered when a supervisor approves a comment.
Action Description	The system sends an email to the user who entered the comment.
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Business Process	BSC_APPROVE_COMMENTS
Activity	BSC_APPROVE_COMMENTS
Role	MANAGER

Comment Rejected Workflow

This topic discusses the comment rejected workflow.

Approval Notification

Information Type	***Description***
Event Description	This even is triggered when a supervisor rejects a comment.
Action Description	The system sends an email to the user who entered the comment.

Information Type	***Description***
Notification Method	Email.

Workflow Objects

Information Type	***Description***
Business Process	BSC_RETURN_EMAIL_COMMENT_BP
Activity	BSC_RETURN_EMAIL_COMMENT_ACT
Role	Users