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# PeopleSoft EPM 9.1: Portal Pack

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June 2013

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PeopleSoft EPM 9.1: Portal Pack  
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# Preface

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## 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.

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**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.

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## 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.

<i>Typographical Convention</i>	<i>Description</i>
<b>Bold</b>	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.
<i>Italics</i>	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 <i>O</i> .
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.

<b>Typographical Convention</b>	<b>Description</b>
{ } (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>.

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## 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 accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

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## PeopleSoft EPM Related Links

[My Oracle Support](#)

[PeopleSoft Information Portal on Oracle.com](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

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## Contact Us

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

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# Getting Started with PeopleSoft EPM Portal Pack

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## PeopleSoft EPM Portal Pack Overview

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

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## PeopleSoft EPM Portal Pack Implementation

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

### Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps.

See the product documentation for *PeopleTools: PeopleSoft Setup Manager* and *PeopleTools: PeopleSoft Component Interfaces*





## Chapter 2

# Understanding PeopleSoft EPM Portal Pack

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## PeopleSoft EPM Portal Pack

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

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

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

## Common Elements Used in the PeopleSoft EPM Portal Pack

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

<b>SetID</b>	Provides the ID code for a tableset. A tableset is a group of tables (records) necessary to define your company's structure and processing options.
<b>Effective Date</b>	Establishes the date the row in the table becomes effective. It determines when you can view and change the information. Pages and batch processes that use the information use the current row.
<b>Status</b>	Indicates whether a row in a table is active or inactive. You cannot select inactive rows on pages or use them for running batch processes.
<b>Description</b>	Allows free-flow text up to 30 characters that describes what you are defining.
<b>Run Control ID</b>	Identifies specific run control settings for a process or report.
<b>Report ID</b>	Identifies the report.
<b>Program Name</b>	Provides the PeopleSoft Enterprise Performance Management program name for which you are running the report or process.

<b>When</b>	Specifies the frequency with which you want to run a process. You can select <i>Once, Always, or Don't</i> .
<b>Last Run On</b>	Indicates the date that the report or process was last run.
<b>As Of Date</b>	Indicates the last date for which the report or process includes data.
<b>Scenario ID</b>	Provides an identifier for a specific scenario.
<b>Model ID</b>	Provides an identifier for a model. A model uniquely identifies the types of data that you want to include in a scenario. For example, you might want to review revenue by region—a very high-level scope. Or, if you use PeopleSoft Analytic Forecasting, you might want to review only those activities that relate to a certain product line for certain types of resources—a very narrow scope.
<b>Fiscal Year</b>	Specifies the fiscal year for your scenario or process run.
<b>Period</b>	Specifies the accounting period for the object being defined or process being run.
<b>Job ID</b>	Specifies an instance of an engine.

## PeopleSoft EPM Portal Pack Pagelets

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

- The audience for the pagelet: employees or customers.  
The audience also identifies the portal registry where the pagelet is registered.
- The role of the person who uses the pagelet.  
These are functional roles, not delivered PeopleTools roles.
- The pagelet's enabling application.  
The enabling application provides the information that appears in the pagelet.

<b>Pagelet Name</b>	<b>Audience</b>	<b>Functional Role</b>	<b>Enabling Application</b>
ABM Object Variance Rates AB_PE_OBJ_VAR	Employee	Management, Analyst	PeopleSoft Activity-Based Management
ABM Object Rates AB_PE_OBJ_RATE	Employee	Management, Analyst	PeopleSoft Activity-Based Management

<b>Pagelet Name</b>	<b>Audience</b>	<b>Functional Role</b>	<b>Enabling Application</b>
ABM Driver Rate Variance AB_PE_DRV_RATE	Employee	Management, Analyst	PeopleSoft Activity-Based Management
WFA Compensation Scenario WA_PE_CP_SUMMARY	Employee	HR Management, HR Analyst	PeopleSoft Workforce Rewards
WFA Market Comp Scenario WA_PE_MC_SCNSUM	Employee	HR Management, HR Analyst	PeopleSoft Workforce Rewards
WFA Retention Scenario WA_PE_RM_SUMMARY	Employee	HR Management, HR Analyst	PeopleSoft Workforce Rewards
Supplier Rating By Item BC_PE_ANLY_SCM1	Employee	Buyer	PeopleSoft Supplier Rating System
Supplier Rating By Category BC_PE_ANLY_SCM2	Employee	Buyer	PeopleSoft Supplier Rating System
Supplier Rating By Supplier BC_PE_ANLY_SCM3	Employee	Buyer	PeopleSoft Supplier Rating System
GC Variance GC_PE_VARIANCE	Employee	Accountant, Controller	PeopleSoft Global Consolidations
My Favorites BC_PE_MY_FAVORITES	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
My Favorites (extension pagelet) BC_PE_MYFAVRTS_MOR	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI List BC_PE_KPICHART	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI List (extension pagelet) BC_PE_KPILIST	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Perspective Assessment BC_PE_PRSPCTV_ASMT	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI Ranking BC_PE_KPI_RANK	Employee, Customer, Supplier	Any	PeopleSoft Scorecard

<b>Pagelet Name</b>	<b>Audience</b>	<b>Functional Role</b>	<b>Enabling Application</b>
KPI Ranking 2 BC_PE_KPI_RANK_2	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI Ranking 3 BC_PE_KPI_RANK_3	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI Ranking 4 BC_PE_KPI_RANK_4	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI Comparison Ranking BC_PE_KPI_KPI_RANK	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI Comparison Ranking 2 BC_PE_KPI_KPI_RNK2	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI Comparison Ranking 3 BC_PE_KPI_KPI_RNK3	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
KPI Comparison Ranking 4 BC_PE_KPI_KPI_RNK4	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Single KPI Detail BC_PE_SINGLE_KPI	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Single KPI Detail 2 BC_PE_SINGLE_KPI_2	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Single KPI Detail 3 BC_PE_SINGLE_KPI_3	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Single KPI Detail 4 BC_PE_SINGLE_KPI_4	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Object Ranking BC_PE_KPI_RK_NOSEC	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Object Ranking 2 BC_PE_KPI_RK_NOSE2	Employee, Customer, Supplier	Any	PeopleSoft Scorecard
Object Ranking 3 BC_PE_KPI_RK_NOSE3	Employee, Customer, Supplier	Any	PeopleSoft Scorecard

<b><i>Pagelet Name</i></b>	<b><i>Audience</i></b>	<b><i>Functional Role</i></b>	<b><i>Enabling Application</i></b>
Object Ranking 4 BC_PE_KPI_RK_NOSE4	Employee, Customer, Supplier	Any	PeopleSoft Scorecard



## Chapter 3

# PeopleSoft Activity-Based Management Pagelets

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## Understanding PeopleSoft Activity-Based Management Pagelets

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

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## Setting Up PeopleSoft Activity-Based Management Portal User Preferences

This section discusses how to:

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

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Result Preferences	AB_USER_PREF_1	Activity Based Management, Setup, Preferences, Preferences, Result Preferences	Establish default settings for the data that appears in PeopleSoft Activity-Based Management pagelets.
Home Preferences	AB_HOME_PREF1	Activity Based Management, Setup, Preferences, Preferences, Home Preferences	Set the preferences that you want the system to use when you navigate to pages using the PeopleSoft Activity-Based Management homepage.

## Result Preferences Page

Use the Result Preferences page (AB\_USER\_PREF\_1) to establish default settings for the data that appears in PeopleSoft Activity-Based Management pagelets.

## Navigation

Activity Based Management, Setup, Preferences, Preferences, Result Preferences

### Image: Result Preferences pagelet

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

The screenshot shows the 'Result Preferences' pagelet with two tabs: 'Result Preferences' (selected) and 'Home Preferences'. The pagelet is divided into three main sections:

- Business Unit:** A text field containing 'CORP1' with a magnifying glass icon and a dropdown menu showing 'Corporation 1'.
- Sort by:** A dropdown menu set to 'Absolute % variance'.
- Current Scenario:** A blue header bar.
- \*Scenario ID:** A text field containing 'ACTUAL01' with a magnifying glass icon.
- \*Calculation Column:** A dropdown menu set to 'Actuals Amount'.
- Fiscal Year:** A text field containing '2010'.
- Period:** A text field containing '1' and a checkbox labeled 'Most Recent Run'.
- Target/Base Scenario:** A blue header bar.
- \*Scenario ID:** A text field containing 'ACTUAL01' with a magnifying glass icon.
- \*Calculation Column:** A dropdown menu set to 'Calculated Amount'.
- Fiscal Year:** A text field containing '2009'.
- Period:** A text field containing '12' and a checkbox labeled 'Current Period - 1'.

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

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

**Business Unit** Select from the available options.

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

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

**Most Recent Run** Select to display the most recent run for the current scenario.

**Current Period - 1** Select to display the target or base scenario.



**Sort Objects by**

Select how you want to sort objects. Values are *Absolute % Variance* (absolute percentage variance), *Absolute Variances*, and *Alphabetically*.

**Home Preferences Page**

Use the Home Preferences page (AB\_HOME\_PREF1) to set the preferences that you want the system to use when you navigate to pages using the PeopleSoft Activity-Based Management homepage.

**Navigation**

Activity Based Management, Setup, Preferences, Preferences, Home Preferences

**Image: Home Preference pagelet**

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

The screenshot shows a web pagelet titled "Home Preferences" with a sub-header "Select User Preferences". Below the header are several input fields:

- SetID:** A text box containing "AMERI" with a magnifying glass icon to its right.
- Business Unit:** A text box containing "00001" with a magnifying glass icon to its right.
- Model ID:** A text box containing "HR" with a magnifying glass icon to its right.
- Scenario ID:** A text box containing "ACTUAL" with a magnifying glass icon to its right.
- Fiscal Year:** A text box containing "2009".
- Period:** A text box containing "3" followed by a checked checkbox labeled "Current Period".

**SetID, Business Unit, Model ID, Scenario ID, Fiscal Year, and Period**

Enter the preferences that you want the system to use when you navigate to pages through the PeopleSoft Activity-Based Management homepage.

**Current Period**

Select to have the system always default the current period into the search record.

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

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## Viewing ABM Data Through Pagelets

This section discusses how to:

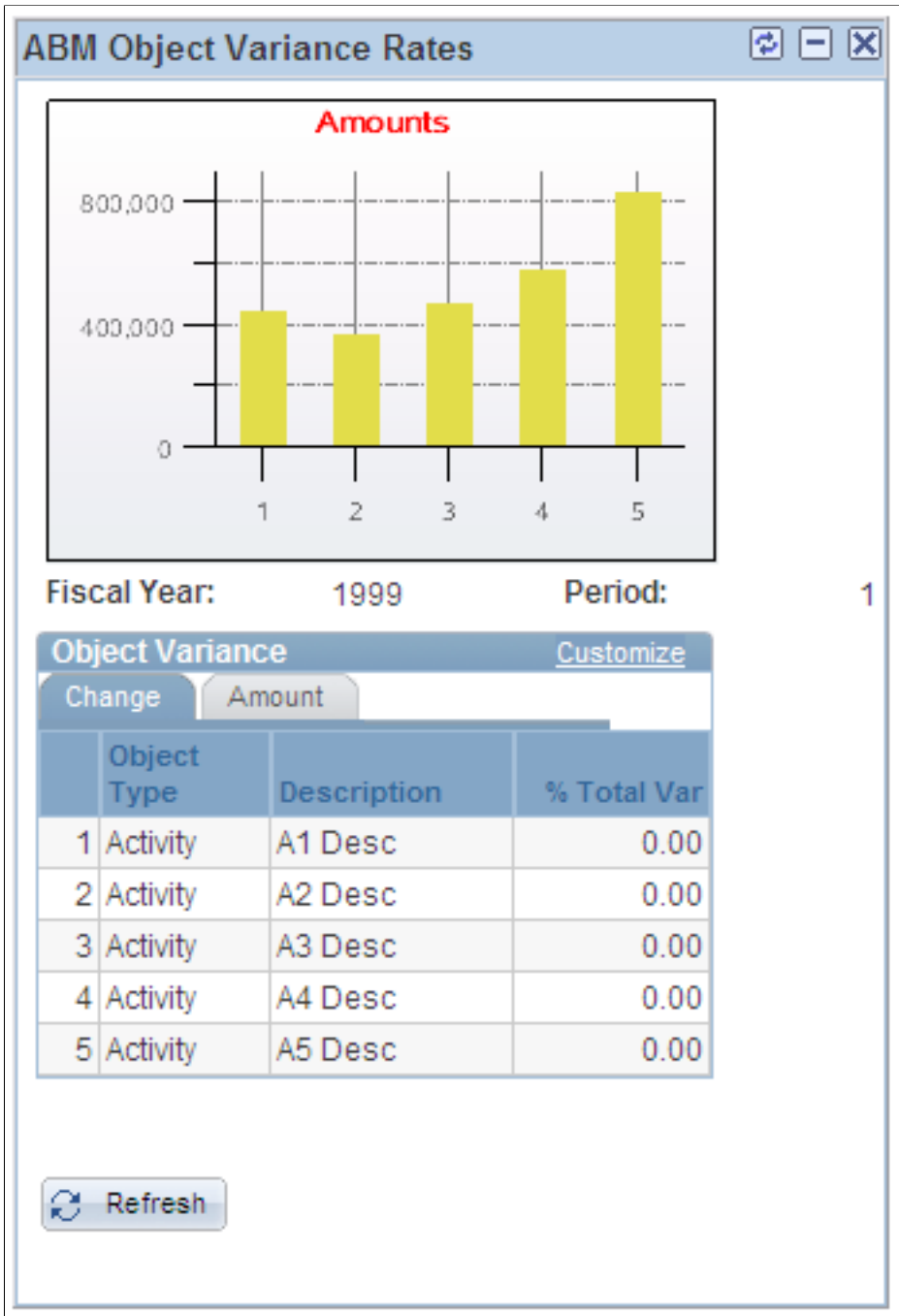
- View the ABM Object Variance Rates pagelet.
- View the ABM Object Rates pagelet.
- View the ABM Driver Rate Variance pagelet.

## ABM Object Variance Rates Pagelet

Use the ABM Object Variance Rates pagelet to view object amount variances.

### Image: ABM Object Variance Rates pagelet

This example illustrates the fields and controls on the ABM Object Variance Rates pagelet. You can find definitions for the fields and controls later on this page.



### Change

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

**Amount**

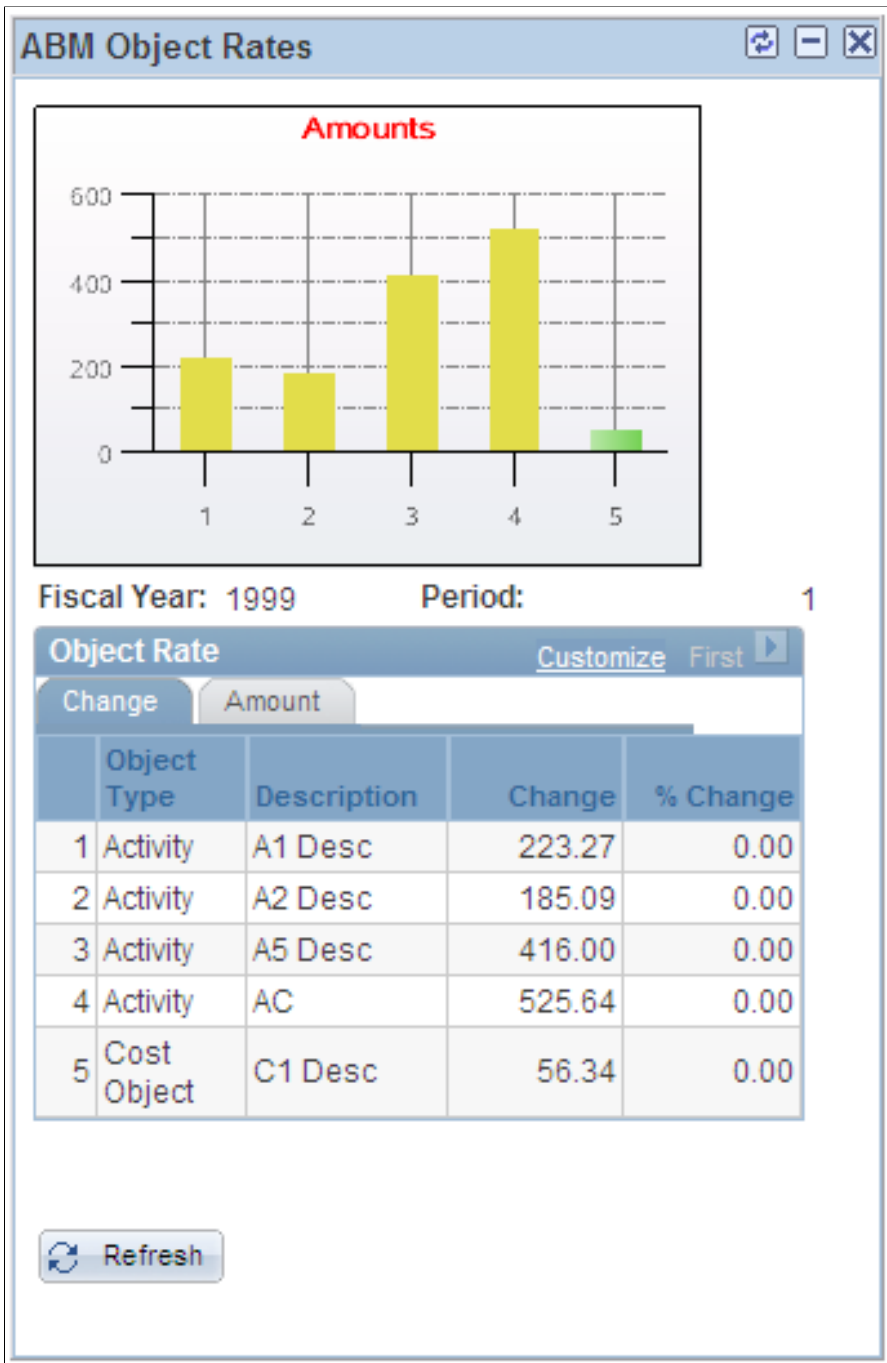
This tab displays the total variance, current amount, and target amount.

**ABM Object Rates Pagelet**

Use the ABM Object Rates pagelet to view object variance rates.

**Image: ABM Object Rates pagelet**

This example illustrates the fields and controls on the ABM Object Rates pagelet. You can find definitions for the fields and controls later on this page.



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

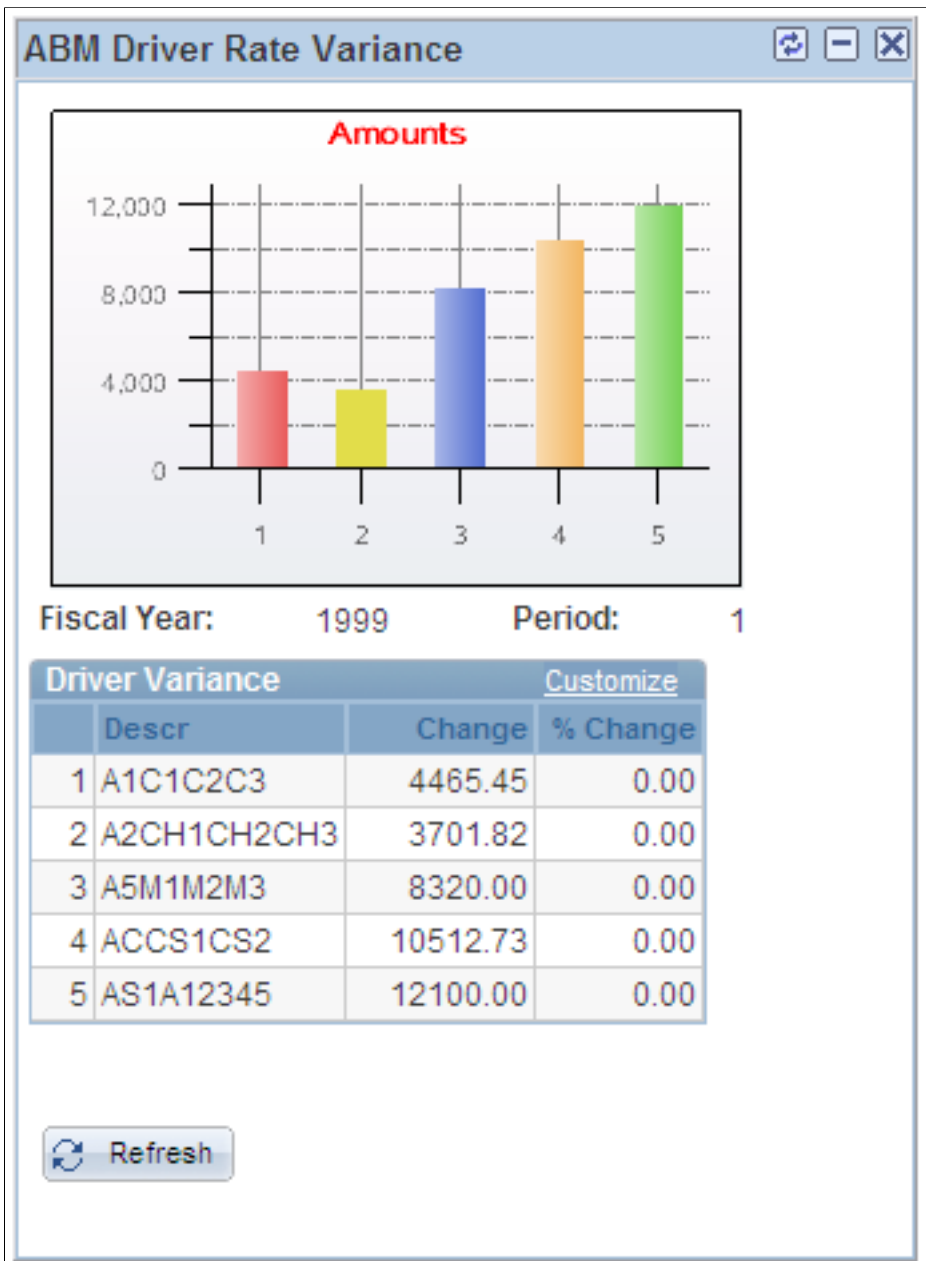
**Amount** This tab displays the current amount and target amount.

### ABM Driver Rate Variance Pagelet

Use the ABM Driver Rate Variance pagelet to view driver rate variances.

**Image: ABM Driver Rate Variance pagelet**

This example illustrates the fields and controls on the ABM Driver Rate Variance pagelet.



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

## Chapter 4

# PeopleSoft Workforce Analytics Pagelets

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## Understanding Workforce Analytics Pagelets

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

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## Establishing Default Settings

To establish default settings, use the WA\_OPER\_DEFAULT.GBL component.

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

This section discusses how to set up operator defaults.

## Page Used to Establish Default Settings

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

## Operator Defaults - My Profile Page

Use the Operator Defaults - My Profile page (WA\_OPER\_DEFAULT) to establish default settings for the data that appears in the pagelets.

## Navigation

Workforce Analytics, Workforce Analytics Setup, Operator Defaults

### Image: Operator Defaults - My Profile page

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

The screenshot shows the 'Operator Defaults' page with the following fields and values:

- User ID:** VP1
- User Defaults:** (Section Header)
- Business Unit:** CORP1
- Compensation Planning:** (Section Header)
  - Scenario ID:** WFR3
  - Fiscal Year:** 2001
- Retention Planning:** (Section Header)
  - Scenario ID:** WFR1
  - Effective Date:** 01/31/2000
- Market Compensation:** (Section Header)
  - Scenario ID:** ACTUAL01
  - Effective Date:** 01/01/1999

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

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

---

## Viewing Workforce Analytics Data Through Pagelets

This section discusses how to:

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

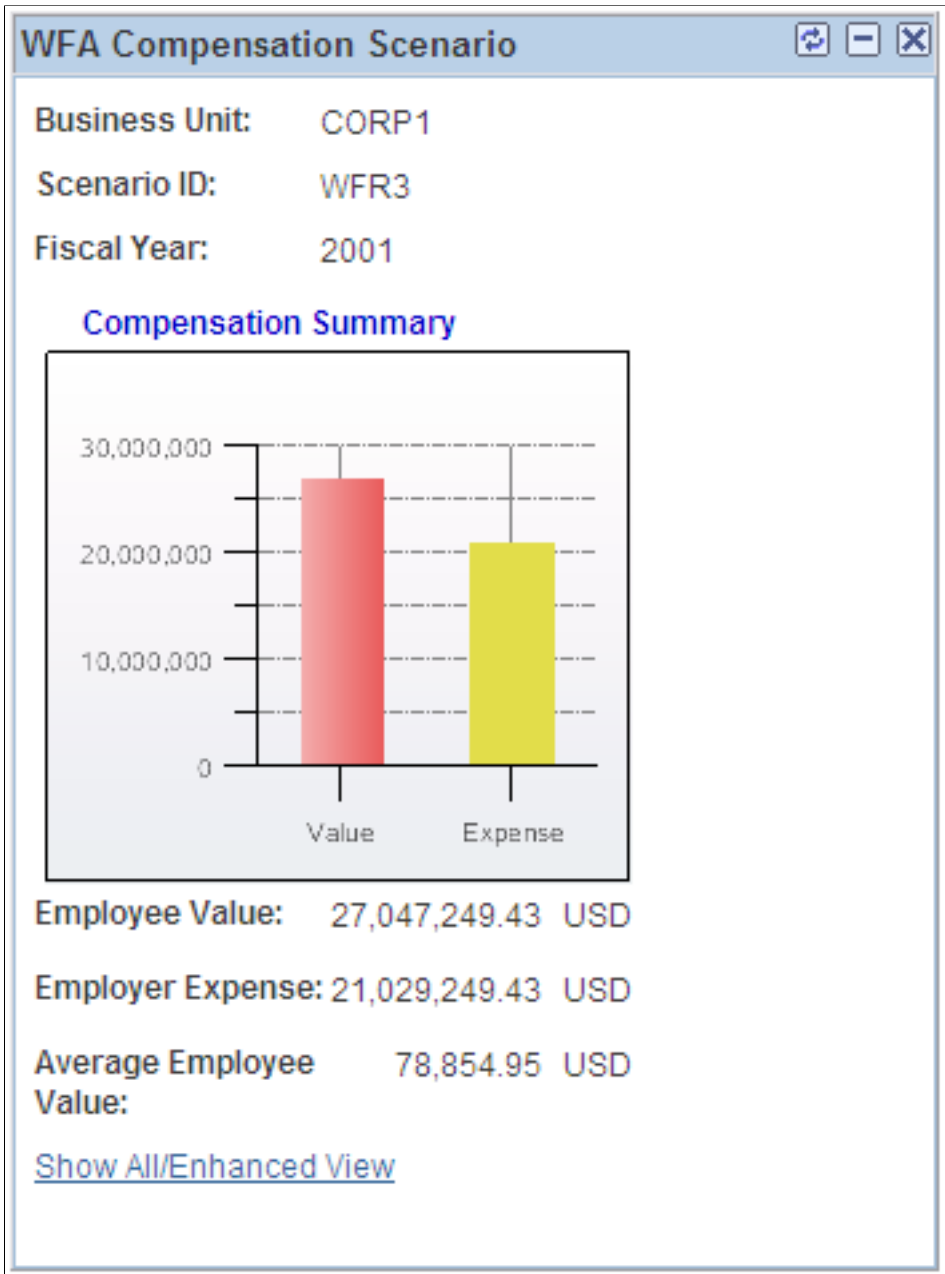


## WFA Compensation Scenario Pagelet

Use the WFA Compensation Scenario pagelet to view high-level summary results for a given compensation planning scenario.

### Image: WFA Compensation Scenario pagelet

This example illustrates the fields and controls on the WFA Compensation Scenario pagelet.



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

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

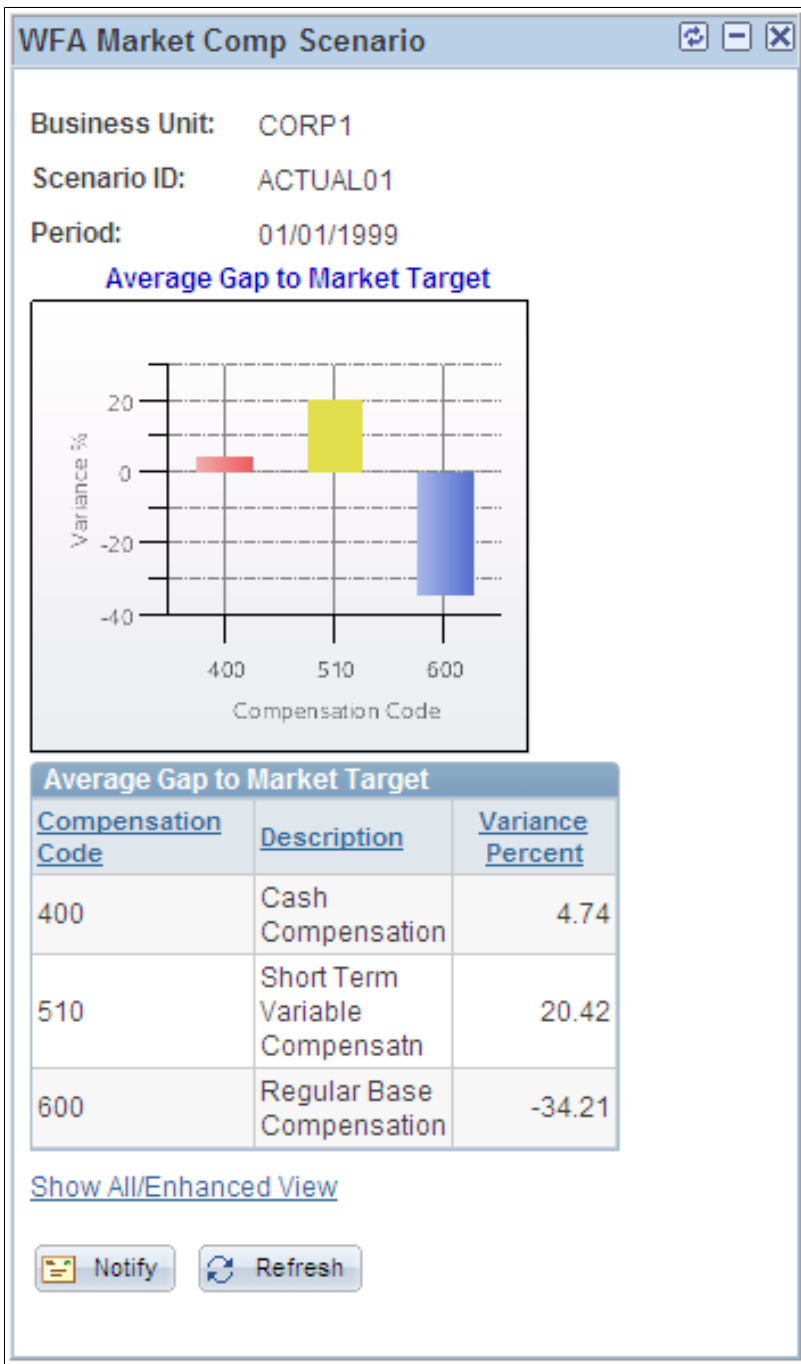
The pagelet also displays, in monetary terms, the employee value, employer expense, and the average employee value. Click the Show All/Enhanced View link to access the Compensation Scenario inquire component, where you can review the scenario details.

## WFA Market Comp Scenario Pagelet

Use the WFA Market Comp Scenario pagelet to view high-level summary results for a given market compensation scenario.

### Image: WFA Market Comp Scenario pagelet

This example illustrates the fields and controls on the WFA Market Comp Scenario pagelet.



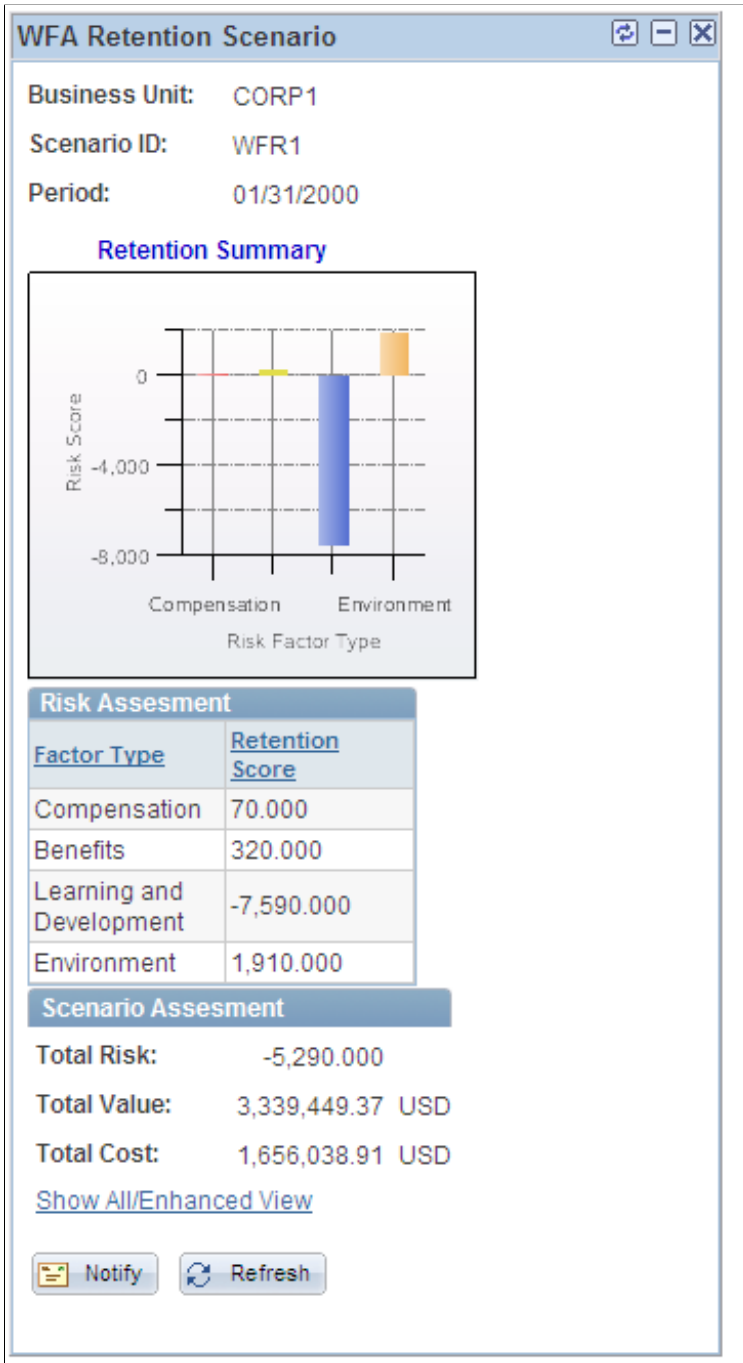
<b>Business Unit, Scenario ID, and Period</b>	Displays the values that you specified on the Operator Defaults - My Profile page.
<b>Variance % Code (variance percentage code) and Compensation</b>	At the center of the pagelet the system displays a bar chart. The chart shows, for each compensation code included in the scenario, the variance percentage between the average monetary amount for the compensation code and the monetary value for the market target rate.
<b>Compensation Code, Description, and Variance Percent</b>	Displays the compensation code, description, and the variance percent.
<b>Show All/Enhanced View</b>	Click this link to access the Market Compensation Scenario inquire component, where you can review the scenario details.

## WFA Retention Scenario Pagelet

Use the WFA Retention Scenario pagelet to view high-level summary results for a given retention planning scenario.

### Image: WFA Retention Scenario pagelet

This example illustrates the fields and controls on the WFA Retention Scenario pagelet. You can find definitions for the fields and controls later on this page.



**Business Unit, Scenario ID, and Period**

Displays the values that you specified on the Operator Defaults - My Profile page.

<b>Risk Factor Type and Risk Score</b>	Displays the risk factor type and the corresponding retention risk score in the bar chart.
<b>Risk Assessment</b>	Displays each retention factor type included in the scenario and the corresponding retention score for that factor type.
<b>Scenario Assessment</b>	Displays the total risk, total value, and total cost assessed for the scenario.
<b>Show All/Enhanced View</b>	Click this link to access the Retention Scenario inquire component, where you can review the scenario details.



# PeopleSoft Supplier Rating System Pagelets

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## Understanding Supplier Rating System Pagelets

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

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## Viewing Supplier Rating System Data Through Pagelets

This section discusses how to:

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

### Related Links

"KPI Analysis Page (*PeopleSoft EPM 9.1: Scorecard*)"

## Supplier Rating By Item Pagelet

Use the Supplier Rating By Item pagelet to view key performance indicator (KPI) ratings and composite KPI weight for suppliers according to item.

### Image: Supplier Rating By Item pagelet

This example illustrates the fields and controls on the Supplier Rating By Item pagelet. You can find definitions for the fields and controls later on this page.

The image shows a screenshot of a web browser window titled "Supplier Rating By Item". The window has a blue header bar with the title and standard window controls (refresh, minimize, maximize, close). Below the header, the main content area has a large blue heading "Supplier Rating By Item". Underneath the heading, there are two input fields. The first is labeled "\*SetID:" and contains the text "SHARE" with a magnifying glass icon to its right. The second is labeled "\*Item ID:" and is an empty text box with a magnifying glass icon to its right. Below these fields is a rectangular button with the text "Search" in a light blue font.

### Search

Enter the SetID and Item ID, then click the Search button.

The system displays the Supplier Rating - Analysis page (BC\_PE\_CKPI\_ANLY\_1), where users can view KPI ratings and composite KPI weight for suppliers for the specified item.



## Supplier Rating By Category Pagelet

Use the Supplier Rating By Category pagelet to view KPI ratings and composite KPI weight for suppliers according to category.

### Image: Supplier Rating By Category pagelet

This example illustrates the fields and controls on the Supplier Rating By Category page. You can find definitions for the fields and controls later on this page.

The image shows a screenshot of a web browser window titled "Supplier Rating By Category". The window has a blue header bar with the title and standard window control buttons (refresh, minimize, maximize). Below the header, the main content area has a large blue heading "Supplier Rating By Category". Underneath the heading, there are two input fields. The first is labeled "\*SetID:" and contains the text "SHARE" with a magnifying glass icon to its right. The second is labeled "\*Category:" and is currently empty, also with a magnifying glass icon to its right. Below these fields is a rectangular button with the text "Search" in a light blue font.

### Search

Enter the SetID and category, then click the Search button.

The system displays the Supplier Rating - Analysis page (BC\_PE\_CKPI\_ANLY\_1), where users can view KPI ratings and composite KPI weight for suppliers for the specified category.

## Supplier Rating By Supplier Pagelet

Use the Supplier Rating By Supplier pagelet to view KPI ratings and composite KPI weight for suppliers according to supplier.

### Image: Supplier Rating By Supplier pagelet

This example illustrates the fields and controls on the Supplier Rating By Supplier pagelet. You can find definitions for the fields and controls later on this page.

The image shows a screenshot of a web browser window titled "Supplier Rating By Supplier". The window has a blue header bar with the title and standard window controls (refresh, minimize, maximize, close). Below the header, the main content area has a large blue heading "Supplier Rating By Supplier". Underneath the heading, there are two input fields. The first is labeled "\*SetID:" and contains the text "SHARE" with a magnifying glass icon to its right. The second is labeled "\*Vendor ID:" and is an empty text box with a magnifying glass icon to its right. Below these fields is a blue "Search" button.

### Search

Enter the SetID and supplier ID, then click the Search button. The system displays the Supplier Rating - Analysis page (BC\_PE\_CKPI\_ANLY\_1), where users can view KPI ratings and composite KPI weight for suppliers for the specified supplier.

## Chapter 6

# PeopleSoft Global Consolidations Pagelet

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## Understanding the PeopleSoft Global Consolidations Pagelet

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

See "Defining User Preferences (*PeopleSoft EPM 9.1: Global Consolidations*)".

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

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## Viewing Global Consolidations Data Through the PeopleSoft Global Consolidations Variance Pagelet

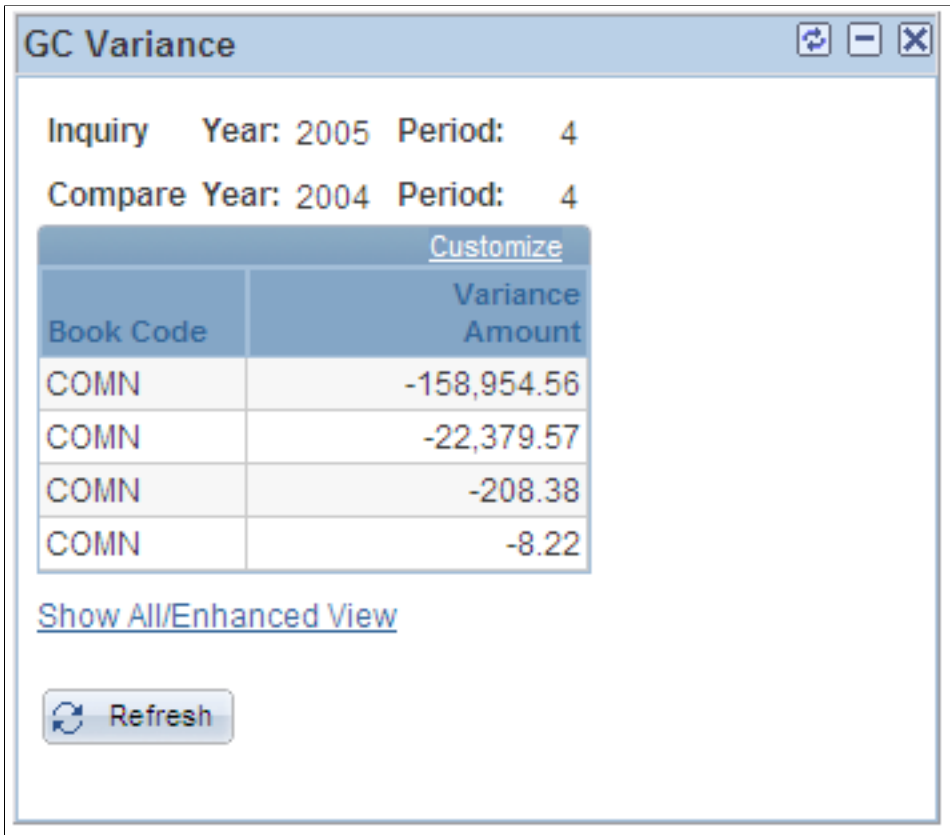
This section discusses how to view the PeopleSoft Global Consolidations Variance pagelet.

## PeopleSoft Global Consolidations Variance Pagelet

Use the PeopleSoft Global Consolidations Variance pagelet to provide the user with a quick glimpse into the largest variances between any PeopleSoft Global Consolidations comparison that the user defines.

### Image: PeopleSoft Global Consolidations Variance pagelet

This example illustrates the fields and controls on the Global Consolidations Variance pagelet.



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

See "Comparing Ledger Balances (*PeopleSoft EPM 9.1: Global Consolidations*)".

## Chapter 7

# PeopleSoft Scorecard Pagelets

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## Understanding PeopleSoft Scorecard Pagelets

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

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

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

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

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## Viewing PeopleSoft Scorecard Data Through Pagelets

This section discusses how to:

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

### My Favorites Pagelet

Use the My Favorites pagelet to display information about scorecard components and KPIs that you selected as favorites.

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

**KPI/Component**

Displays types in the following order: KPIs first, followed by strategy components in hierarchical order (vision, strategic thrusts, and critical success factors). Each type is sorted alphabetically by description. The dimension (for a KPI) or scorecard (for strategy components) associated with the item is also listed.

**Show All/Enhanced View**

Click this link to view additional rows in the extension pagelet. The extension pagelet additionally displays trend, actual value, target, and percent of target for each KPI or component, and you can remove items from the list of favorites by selecting the Remove check box and saving the pagelet.

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

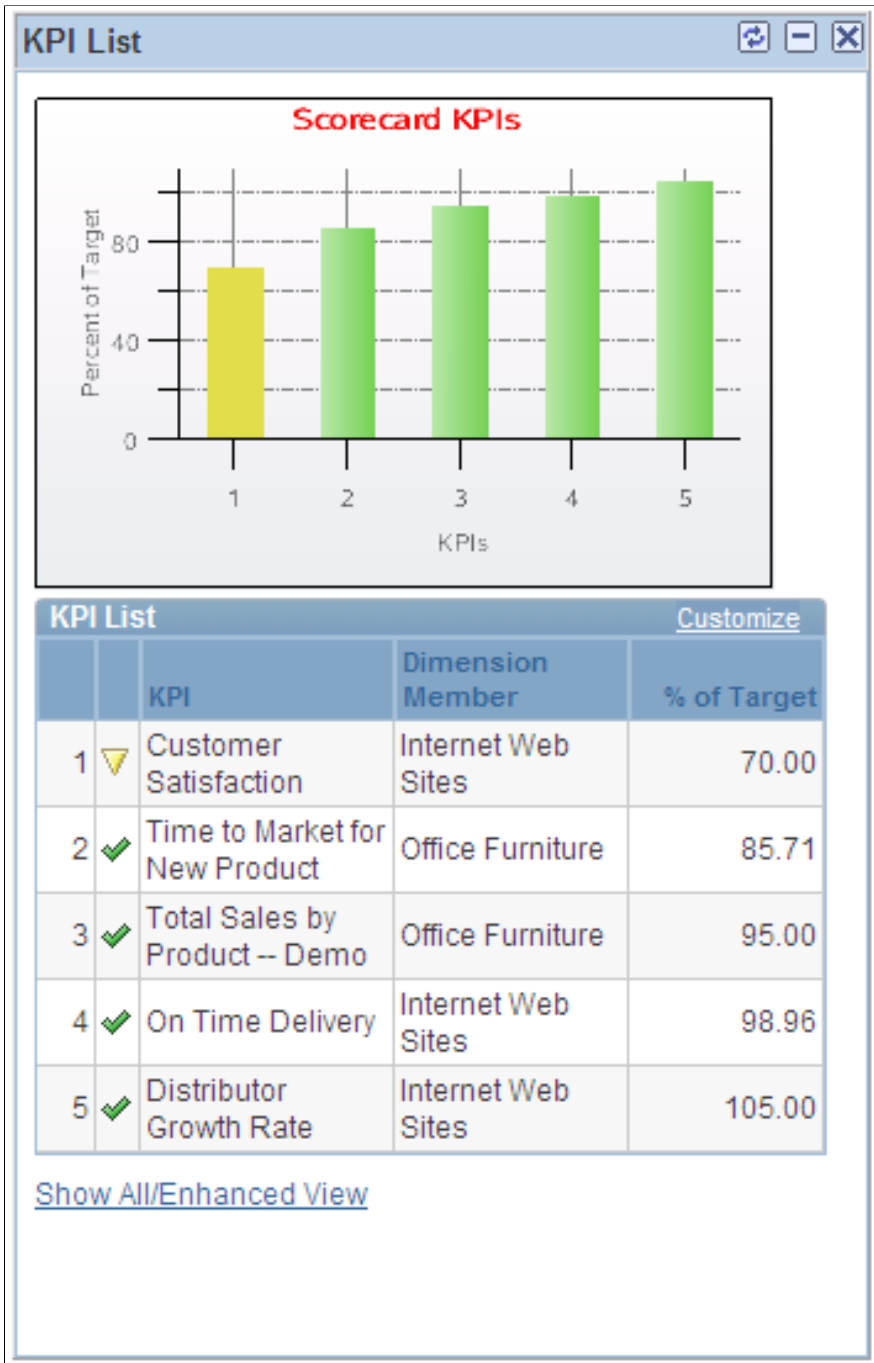
- Field to sort by (PCT\_OF\_TARGET or RESOLVED\_VALUE).
- Sort order (ascending or descending).

## KPI List Pagelet

Use the KPI List pagelet to view assessment results for KPIs that belong to the default user-specified scorecard in the My Profile component.

### Image: KPI List pagelet

This example illustrates the fields and controls on the KPI List pagelet.



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

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

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

- Field to sort by (PCT\_OF\_TARGET or RESOLVED\_VALUE).
- Sort order (ascending or descending).

## Perspective Assessment Pagelet

Use the Perspective Assessment pagelet to view assessment results for your default scorecard and is categorized by perspective.

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

## KPI Ranking 2 Pagelet

Use the KPI Ranking 2 pagelet to view a detailed list or chart of the top dimensions, such as top customers, channels, or suppliers. This information is based on the KPI and preferences that users specify on the Portal Preferences page.

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

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

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



## Related Links

"KPI Analysis Page (*PeopleSoft EPM 9.1: Scorecard*)"

## KPI Comparison Ranking 2 Pagelet

Use the KPI Comparison Ranking 2 pagelet to view a comparison list of the top dimensions, such as top customers, channels, or suppliers for the week. This information is based on the preferences and two KPIs that users specify on the Portal Preferences page.

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

- Business unit.
- Scenario ID.
- Meaningful label (for example, Top Projects This Week).
- Display preference (such as the percent of target, assessment, resolve value, or trend).
- Field to sort by (PCT\_OF\_TARGET or RESOLVED\_VALUE).
- Sort order (ascending or descending).
- Two KPIs.

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

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

## Related Links

"KPI Analysis Page (*PeopleSoft EPM 9.1: Scorecard*)"

## Single KPI Detail Pagelet

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

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

- Business unit.

- Scenario ID.
- Show resolved value.
- Meaningful label (for example, Customer Satisfaction This Week).
- Show assessment.
- Show KPI target.
- Show trend indicator.
- One KPI and one dimension.

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

### Related Links

"KPI Detail Page (*PeopleSoft EPM 9.1: Scorecard*)"

## Object Ranking Pagelet

Use the Object Ranking pagelet to view an informational list of the top dimensions, such as top customers, channels, or suppliers for the week. This information is based on the KPI and preferences that users specify on the Pagelet Preferences page.

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

- Business unit.
- Scenario ID.
- Meaningful label (for example, Top Channels This Week).
- Field to sort by (PCT\_OF\_TARGET or RESOLVED\_VALUE).
- Sort order (ascending or descending).
- One KPI.

# Delivered PeopleSoft Investor Portal KPIs

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## Understanding Delivered Investor Portal KPIs and the Investor Portal Solution

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

- PeopleSoft Investor Portal Pack.

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

- PeopleSoft Applications Portal.

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

- PeopleSoft Scorecard.

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

- PeopleSoft Enterprise Performance Management Portal Pack.

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

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

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

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

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

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

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

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

## Investor Portal KPI Source and Benchmark Data

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

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## Investor Portal KPI Technical Detail

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

This section discusses:

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

### Related Links

"Establishing KPIs (*PeopleSoft EPM 9.1: Scorecard*)"

## KPI Terminology

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

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

<b>Term</b>	<b>Definition</b>
KPI Definition	Defines a KPI to the system. You specify how to calculate it, the KPI dimension members, and their target rules.
What this KPI does	Narrative description of this KPI.

<b>Term</b>	<b>Definition</b>
Calculation Description	<ul style="list-style-type: none"> <li>• The analysis calculations that comprise the KPIs, which illustrate the record and fields being accessed. The tablemaps and datamaps access this information.</li> <li>• The type of aggregation that is occurring: This information is shown on the data element page.</li> <li>• The criteria necessary to access a specific field: This information is shown on the filter.</li> <li>• The fields that are being aggregated: This information is shown on the data element page.</li> </ul>
Calculation Expression	The entry in the Calculation Expression field on the Calculation (KP_CALC_DEFN2) page.
Composite Pieces	KPIs used if this is a composite KPI; this is blank or n/a for all but composite KPIs.
Data Used in the KPI	KPI name or KPI ID. Not used for composite KPIs.
Calculation Definition	Defines calculations on which a KPI is based.
KPI Calculation Rule	Assigns calculation IDs to a KPI.
Tablemap	Defines the physical relationships between tables and is the foundation for datamaps.
Datamap	Enables you to define what subset of data gets processed by or uses a specific business rule.
Filter	Filters give you the ability to define what subset of data gets processed by or uses a specific business rule.
Constraint	Is based on datamaps. Constraints enable you to define business rules for processing and also enable you to reuse and group filters.
Data Element	Defines a subset of data and the rules by which to group it. Data elements are used as the basis for key performance indicators and as target values for KPI members.
Model ID	Enables you to define the type of data you want to analyze and how you want to analyze it.
Scenario	Points to a Model ID and defines the business rules, economic assumptions, and chunking selection for processing.
KPI Dimension Members	Individual items for which a KPI is assessed.
KPI Target Rule	Rules that determine how a KPI dimension member is assessed.

<b>Term</b>	<b>Definition</b>
Dimension	An attribute, such as time, product, and location, used to categorize or identify a particular piece of data. In the Enterprise Performance Management product line, you can view product, customer, and channel dimensions.
KPI Type	One of these: Manual, Calculated, Composite, Derived.

## Additional Terminology

This section lists additional terminology.

### Composite KPIs

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

### Manual KPIs

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

## Naming Convention

The delivered KPIs follow a standardized naming convention. All Investor Portal KPIs begin with FSV\_.

## Manual Investor Portal KPIs

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

<b>KPI ID</b>	<b>Description</b>	<b>KPI Type</b>	<b>KPI Target Rule</b>
FSV_CUST	<p>Customer Satisfaction Composite.</p> <p>A combination of three business metrics to indicate levels of customer satisfaction. Expressed on a scale of 1 to 4, with 4.0 being a perfect score. Metrics include: customer retention, customer support response, and customer satisfaction survey.</p>	<p>Composite of three manual KPIs comprising:</p> <ul style="list-style-type: none"> <li>FSV_CST01 (Customer Retention) Weighting 45%</li> <li>FSV_CST02 (Customer Support Response) Weighting 30%</li> <li>FSV_CST03 (Customer Satisfaction Survey) Weighting 25%</li> </ul>	<p>Target type = scorecard</p> <p>Rule: &gt;= 95.00, green</p> <p>Rule: &gt;= 90.00, yellow</p> <p>Rule: &lt; 90.00, red</p>

<b>KPI ID</b>	<b>Description</b>	<b>KPI Type</b>	<b>KPI Target Rule</b>
FSV_INV	<p>Innovation Composite</p> <p>A combination of three business metrics to indicate levels of innovation. Expressed on a scale of 1 to 4, with 4.0 being a perfect score. Metrics include: percentage of new product revenues, new product pipeline, patents and patents pending.</p>	<p>Composite of three manual KPIs comprising:</p> <ul style="list-style-type: none"> <li>FSV_INV01 (Percentage of new product revenues) Weighting 25%</li> <li>FSV_INV02 (New product pipeline) Weighting 40%</li> <li>FSV_INV03 (Patents and patents pending) Weighting 35%</li> </ul>	<p>Target type = scorecard</p> <p>Rule: &gt;= 95.00, green</p> <p>Rule: &gt;= 90.00, yellow</p> <p>Rule: &lt; 90.00, red</p>
FSV_QUAL	<p>Quality Composite.</p> <p>A combination of three business metrics to indicate levels of quality—quality of people, processes, and products. Expressed on a scale of 1 to 4, with 4.0 being a perfect score. Metrics include: six sigma/ISO certification, percentage of employees in training, and utilization (billable hours).</p>	<p>Composite of three manual KPIs comprising:</p> <ul style="list-style-type: none"> <li>FSV_QAL01 (Six sigma/ISO certification) Weighting 33%</li> <li>FSV_QAL02 (Percentage of employees in training) Weighting 33%</li> <li>FSV_QAL03 (Utilization) Weighting 33%</li> </ul>	<p>Target type = scorecard</p> <p>Rule: &gt;= 95.00, green</p> <p>Rule: &gt;= 90.00, yellow</p> <p>Rule: &lt; 90.00, red</p>
FSV_FIN	<p>Financial Composite</p> <p>A combination of three business metrics to indicate levels of financial health—D&amp;B rating, credit rating, financial stress. Expressed on a scale of 1 to 4, with 4.0 being a perfect score. Metrics include: Dun &amp; Bradstreet rating, credit rating, and financial stress rating.</p>	<p>Composite of three manual KPIs comprising:</p> <ul style="list-style-type: none"> <li>FSV_FIN01 (D&amp;B rating) Weighting 40%</li> <li>FSV_FIN02 (Credit rating) Weighting 30%</li> <li>FSV_FIN03 (Financial stress) Weighting 33%</li> </ul>	<p>Target type = scorecard</p> <p>Rule: &gt;= 95.00, green</p> <p>Rule: &gt;= 90.00, yellow</p> <p>Rule: &lt; 90.00, red</p>

## Calculated Investor Portal KPIs

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

**Note:** The Investor Portal KPIs are calculated based on quarterly periods, not the regular monthly period of the source data. The view PS\_LEDGER\_F00\_VW2, used in the tablemap and datamap, handles the mapping from the detail period to the quarterly period.

The run control for running BC\_ANALYZE for these KPIs shows quarter as the period for running the process.

## Return on Assets

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSV_ASRET
What this KPI does	This KPI measures how well a company is using its assets to generate earnings independent of the financing of those assets by dividing the fiscal year earnings from total operations (not including extraordinary items) by the total assets, expressed as a percentage.
Calculation Description	Total net income divided by total assets.
Calculation Expression	$FSV\_NIVC * 100 / FSV\_ASSET$
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_NIVC FSV_ASSET
Calculation Definition (Calculation ID)	FSV_ASRET
KPI Calculation Rule ID	FSV_ASRET
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_ACCT05, FSV_LED01, FSV_ACCTPER02
Constraint	FSV_NIVC, FSV_ASSET
Data Element	FSV_NIVC, FSV_ASSET
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard  Rule: $\geq 95.00$ , green  Rule: $\geq 90.00$ , yellow  Rule: $< 90.00$ , red



<b>Definition Detail</b>	<b>Value</b>
Dimension	Business unit
Perspective Type	Financial

## Beta

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSV_BETA
What this KPI does	This KPI measures the beta of a given stock.
Calculation Description	Latest market data value on the FSVMD_RLTMFD table.
Calculation Expression	FSV_BETA
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_BETA
Calculation Definition (Calculation ID)	FSV_BETA
KPI Calculation Rule ID	FSV_BETA
Tablemap	FSV_REALTM
Datamap	FSV_REALTM
Filter	FSV_BETA FSV_TICKER
Constraint	FSV_BETA
Data Element	FSV_BETA
Model ID	FSK
Scenario	FSV_SCENAR

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

## Debt to Equity

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSV_D2E
What this KPI does	This KPI monitors a company's leverage by dividing the fiscal year-end long-term debt by total common equity (a dollar amount), as taken from the latest 10K report.
Calculation Description	Divide the fiscal year-end debt by the total equity.
Calculation Expression	FSV_DEBT / FSV_EQUITY
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_DEBT FSV_EQUITY
Calculation Definition (Calculation ID)	FSV_D2E
KPI Calculation Rule ID	FSV_D2E
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_LED01, FSV_ACCTPER02, FSV_ACCT10, FSV_LED01

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

## Dividend Yield

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSV_DVRET
What this KPI does	This KPI monitors the money your company makes on your investment as a percentage by dividing the latest dividend rate by the latest closing price.
Calculation Description	Dividend rate divided by outstanding shares divided by the current share price.
Calculation Expression	$FSV\_DIVIDE * 100 / FSV\_SHARES / FSV\_SPVC$
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_DIVIDE FSV_SHARES FSV_SPVC

<b>Definition Detail</b>	<b>Value</b>
Calculation Definition (Calculation ID)	FSV_DVRET
KPI Calculation Rule ID	FSV_DVRET
Tablemap	FSV_LEDGER FSV_REALTM
Datamap	FSV_LEDGER FSV_REALTM
Filter	FSV_SHARES FSV_SPVC FSV_ACCT09, FSV_LED01, FSV_ACCTPER02, FSV_ACCTPER03
Constraint	FSV_SHARES FSV_SPVC FSV_DIVIDEN
Data Element	FSV_SHARES FSV_SPVC FSV_DIVIDE
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business unit
Perspective Type	Financial

## Earnings per Share

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSV_EPS
What this KPI does	This KPI monitors the earnings per share in dollars by dividing the net income by the total outstanding number of shares.
Calculation Description	Net income divided by outstanding shares.
Calculation Expression	FSV_NIVC/FSV_SHARES
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_NIVC FSV_SHARES
Calculation Definition (Calculation ID)	FSV_EPS
KPI Calculation Rule ID	FSV_EPS
Tablemap	FSV_LEDGER FSV_REALTM
Datamap	FSV_LEDGER FSV_REALTM
Filter	FSV_ACCT01, FSV_ACCT02, FSV_LED01, FSV_ _ACCTPER01, FSV_ACCT10, FSV_LED01, FSV_ _ACCTPER02 FSV_SHARES
Constraint	FSV_NIVC, FSV_SHARES
Data Element	FSV_NIVC, FSV_SHARES
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red

<b>Definition Detail</b>	<b>Value</b>
Dimension	Business Unit
Perspective Type	Financial

## Prior Period Earnings per Share

This section discusses the KPI definition detail:

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

<b>Definition Detail</b>	<b>Value</b>
KPI Target Rule	Not applicable
Dimension	Business Unit
Perspective Type	Financial

## Earnings Growth Per Share

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSV_EPSGR
What this KPI does	This KPI monitors the earnings per share expressed as a month-over-month (as well the cumulative tab and last year tab reflecting quarter-over-quarter and year-over-year) percentage change.
Calculation Description	Current earnings per share minus prior period earnings per share divided by the prior period earnings per share.
Calculation Expression	$(FSV\_EPS - FSV\_EPS-1) * 100 / FSV\_EPS-1$
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_EPS FSV_EPS-1
Calculation Definition (Calculation ID)	FVS_EPSGR
KPI Calculation Rule ID	FSV_EPSGR
Tablemap	FSV_LEDGER FSV_REALTM
Datamap	FSV_LEDGER FSV_REALTM
Filter	FSV_ACCT01, FSV_ACCT02, FSV_LED01, FSV_ACCTPER01, FSV_ACCT10, FSV_LED01, FSV_ACCTPER02  FSV_SHARES

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

## Return on Equity

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSV_EQRET
What this KPI does	This KPI monitors the return on equity as a percentage by dividing the fiscal year total net income by stockholders' equity (as taken from the 10K).
Calculation Description	Total net income divided by stockholders' equity.
Calculation Expression	$FSV\_NIVC * 100 / FSV\_EQUITY$
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_NIVC  FSV_EQUITY
Calculation Definition (Calculation ID)	FSV_EQRET
KPI Calculation Rule ID	FSV_EQRET
Tablemap	FSV_LEDGER



<b>Definition Detail</b>	<b>Value</b>
Datamap	FSV_LEDGER
Filter	FSV_ACCT08, FSV_LED01, FSV_ACCTPER02
Constraint	FSV_NIVC, FSV_EQUITY
Data Element	FSV_NIVC, FSV_EQUITY
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business unit
Perspective Type	Financial

## Market Capitalization

This section discusses the KPI definition detail:

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

<b>Definition Detail</b>	<b>Value</b>
KPI Calculation Rule ID	FSV_SPVC
Tablemap	FSV_REALTM
Datamap	FSV_REALTM
Filter	FSV_SHARES FSV_SPVC FSV_TICKER
Constraint	FSV_SHARES FSV_SPVC
Data Element	FSV_SHARES FSV_SPVC
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Not applicable
Dimension	Business Unit
Perspective Type	Financial

## Operating Margin

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSV_MGN
What this KPI does	This KPI monitors the operating margin as a percentage obtained by dividing the operating income by gross revenue.
Calculation Description	Operating income divided by the gross revenue.
Calculation Expression	$FSV\_OIVC * 100 / FSV\_REWC$
KPI Type	Calculated
Composite Pieces	Not applicable

<b>Definition Detail</b>	<b>Value</b>
Data Used in the KPI	FSV_OIVC FSV_REWC
Calculation Definition (Calculation ID)	FSV_MGN
KPI Calculation Rule ID	FSV_MGN
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_ACCT03, FSV_ACCT04, FSV_LED01, FSV_ACCTPER01
Constraint	FSV_OIVC, FSV_REVVC
Data Element	FSV_OIVC, FSV_REVVC
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business unit
Perspective Type	Financial

## Market Capitalization

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSV_MKTCAP
What this KPI does	This KPI measures the market capitalization of a given stock.
Calculation Description	Number of outstanding shares multiplied by the current share price.
Calculation Expression	FSV_SHARES * FSV_SPVC

<b>Definition Detail</b>	<b>Value</b>
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_SHARES, FSV_SPVC
Calculation Definition (Calculation ID)	FSV_MKTCAP
KPI Calculation Rule ID	FSV_MKTCAP
Tablemap	FSV_REALTM
Datamap	FSV_REALTM
Filter	FSV_SHARES, FSV_SPVC, FSV_TICKER
Constraint	FSV_SHARES, FSV_SPVC
Data Element	FSV_SHARES, FSV_SPVC
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard Rule: >= 95.00, green Rule: >= 90.00, yellow Rule: < 90.00, red
Dimension	Business Unit
Perspective Type	Financial

## NPV Cash Flow

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSV_NPV
What this KPI does	This KPI monitors the cash flow discounted to the net present value (NPV).

<b>Definition Detail</b>	<b>Value</b>
Calculation Description	Multiply the operating cash flows from the general ledger (tree structure) and the NPV factor.
Calculation Expression	FSV_CASHVC * FSV_NPVFAC
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_CASHVC FSV_NPVFAC
Calculation Definition (Calculation ID)	FSV_NPV
KPI Calculation Rule ID	FSV_NPV
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_ACCT11, FSV_LED01, FSV_LED02
Constraint	FSV_CASHVC
Data Element	FSV_CASHVC
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard  Rule: >= 95.00, green  Rule: >= 90.00, yellow  Rule: < 90.00, red
Dimension	Business Unit
Perspective Type	Financial

## Price Earning Ratio

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSV_PE
What this KPI does	This KPI monitors the price earning ratio for a stock by dividing the stock price by its earnings per share.
Calculation Description	Stock price divided by the earning per share.
Calculation Expression	FSV_SPVC / FSV_EPS
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_SPVC FSV_EPS
Calculation Definition (Calculation ID)	FVS_PE
KPI Calculation Rule ID	FSV_PE
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_ACCT01, FSV_ACCT02, FSV_LED01, FSV_ACCTPER01, FSV_ACCT10, FSV_LED01, FSV_ACCTPER02  FSV_SPVC is manual
Constraint	FSV_NIVC, FSV_SHARES  FSV_SPVC is manual
Data Element	FSV_NIVC, FSV_SHARES  FSV_SPVC is manual
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Target type = scorecard  Rule: >= 95.00, green  Rule: >= 90.00, yellow  Rule: < 90.00, red

<b>Definition Detail</b>	<b>Value</b>
Dimension	Business unit
Perspective Type	Financial

## Quick Ratio

This section discusses the KPI definition detail:

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

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

## Gross Revenue

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSV_REV
What this KPI does	This KPI monitors the gross revenue.
Calculation Description	Gross revenue
Calculation Expression	FSV_REWC
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_REWC
Calculation Definition (Calculation ID)	FSV_REWC
KPI Calculation Rule ID	FSV_REWC
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_ACCT01 FSV_LED01 FSV_ACCTPER01
Constraint	FSV_REWC
Data Element	FSV_REWC



<b>Definition Detail</b>	<b>Value</b>
Model ID	FSK
Scenario	FSK_SCENAR
KPI Target Rule	Not applicable
Dimension	Business unit
Perspective Type	Financial

## Prior Period Revenue

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSV_REV-1
What this KPI does	This KPI shows the gross revenue for the prior period.
Calculation Description	Not applicable
Calculation Expression	Not applicable
KPI Type	Derived
Composite Pieces	Not applicable
Data Used in the KPI	FSV_REV Different timespan
Calculation Definition (Calculation ID)	Not applicable
KPI Calculation Rule ID	Not applicable
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER
Filter	FSV_ACCT01 FSV_LED01 FSV_ACCTPER01
Constraint	FSV_REWC

<b>Definition Detail</b>	<b>Value</b>
Data Element	FSV_REWC
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Not applicable
Dimension	Business unit
Perspective Type	Financial

## Revenue Growth

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSV_REVGR
What this KPI does	This KPI monitors the period-over-period percentage change of gross revenues.
Calculation Description	Current gross revenue minus prior period gross revenue divided by the prior period gross revenue.
Calculation Expression	$(FSV\_REV - FSV\_REV-1) * 100 / FSV\_REV-1$
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	FSV_REV FSV_REV-1
Calculation Definition (Calculation ID)	FSV_REVGR
KPI Calculation Rule ID	FSV_REVGR
Tablemap	FSV_LEDGER
Datamap	FSV_LEDGER

<b>Definition Detail</b>	<b>Value</b>
Filter	FSV_ACCT01 FSV_LED01 FSV_ACCTPER01
Constraint	FSV_REWC
Data Element	FSV_REWC
Model ID	FSK
Scenario	FSV_SCENAR
KPI Target Rule	Not applicable
Dimension	Business unit
Perspective Type	Financial

## Share Price

This section discusses the KPI definition detail:

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

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

## Chapter 9

# PeopleSoft CFO Portal and PeopleSoft Government Portal Solutions

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## Understanding CFO and Government Portal KPIs

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

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

- KPIs.
- PeopleSoft EPM Portal Pack.
- PeopleSoft Financials Portal Pack.
- PeopleSoft Applications Portal.
- PeopleSoft Scorecard.

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

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

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

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

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## Terminology

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

**Calculation** The analysis calculations that comprise the KPIs illustrate:

- The record and fields being accessed. This information is accessed by the tablemaps and datamaps.
- The criteria necessary to access a specific field. This information is shown on the filter.
- The type of aggregation that is occurring. This information is shown on the data element page.
- The fields that are being aggregated. This information is shown on the data element page.

<b>Tablemap</b>	Defines the physical relationships between tables and is the foundation for datamaps.
<b>Datamap</b>	Brings together information from the different tables specified in a tablemap and defines it as if it were one entity or table.
<b>Filter</b>	Filters give you the ability to define what subset of data gets processed by or uses a specific business rule.
<b>Constraint</b>	Constraints are based on datamaps. Constraints enable you to define business rules for processing and also enable you to reuse and group Filters.
<b>Data Element</b>	Defines a subset of data and the rules by which to group it. Data elements are used as the basis for key performance indicators, and as target values for Key Performance Indicator (KPI) objects.
<b>Calculation Definition</b>	Defines calculations on which a KPI is based.
<b>KPI Definition</b>	To define a KPI to the system, you'll specify how to calculate it, the KPI objects, and their target rules.
<b>Model ID</b>	Models enable you to define the type of data you want to analyze and how you want to analyze it.
<b>Scenario</b>	A Scenario points to a Model ID and defines the Business Rules, Economic Assumptions, and Chunking Selection for processing.
<b>KPI Calculation Rule</b>	Assigns Calculation IDs to a KPI.
<b>KPI Objects</b>	The individual elements, or rows of data, assessed for a KPI.
<b>KPI Target Rule</b>	Rules that determine how a KPI object is assessed.
<b>Strategy KPIs</b>	Calculated values by which you assess your critical success factors, strategic thrusts, and strategic initiatives. A KPI is associated with a strategy tree component or strategic initiative.
<b>Dimension</b>	A dimension is a particular view (or slice from a certain perspective) of data. In the Enterprise Performance Management product line, you have the choice of viewing product, customer,

sales territory, marketing campaign, support organization, business unit, and channel dimensions.

### Perspective Type

A category for organizing CSFs and KPIs. Usually there are four: financial, customer, internal process, learning and growth.

## PeopleSoft CFO Portal and Government Portal KPI Technical Detail

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

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

### Days Sales Outstanding

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_AR01
What this KPI does	This KPI monitors days sales outstanding by business unit.
Calculation Description	Days Sales Outstanding
Calculation Expression	FSK_DE_DSO
KPI Type	Manual
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_AR0 (Days Sales Outstanding) DE: FSK_DE_DSO
Calculation Definition (Calculation ID)	FSK_DSO90
KPI Calculation Rule ID	FSK_DE_DSO
Tablemap	FSK_CSTHST
Datamap	FSK_CSTHST
Filter	FSK_FILTER_DSO90
Constraint	FSK_CN_DSO90

<b>Definition Detail</b>	<b>Value</b>
Data Element	FSK_DE_DSO
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CORP1
KPI Target Rule	Target Type: = Numeric
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Sales Pipeline by BU

This section discusses the KPI definition detail:

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



<b>Definition Detail</b>	<b>Value</b>
Tablemap	OPPORTUNIT
Datamap	FSK_OPPF00
Filter	FSK_FILTER_COM FSK_CLOSED_OPP_4TER
Constraint	FSK_CN_COMMITTED FSK_CN_CLOSED
Data Element	FSK_DCBU1 (Opportunities committed to Close by business unit) FSK_DE_CB1 (Opportunities Closed by business unit) FSK_DE_FBU (Forecasted Sales by business unit)
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CORP1
KPI Target Rule	Target Type: = % of Target Primary Target = FSK_DE_FBU (Forecasted Sales by BU)
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Sales Pipeline by Territory

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_CRM_TR
What this KPI does	This KPI monitors the sales pipeline by sales territory.
Calculation Description	Closed by Territory + Committed by Territory

<b>Definition Detail</b>	<b>Value</b>
Calculation Expression	FSK_DE_CT1 + FSK_DECTR1
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_CRM_TR (Sales Pipeline by Territory) DE: FSK_DE_CT1 (Opportunities Closed within a Territory) DE: FSK_DECTR1 (Opportunities Committed to Close by Territory) DE: FSK_DE_FTR (Sales Forecast by Territory)
Calculation Definition (Calculation ID)	FSK_CA_CRM
KPI Calculation Rule ID	FSK_CA_CRM
Tablemap	OPPORTUNIT
Datamap	FSK_OPPF00
Filter	FSK_CLOSED_OPP_4TER FSK_FILTER_COM
Constraint	FSK_CN_CLOSED FSK_CN_COMMITTED
Data Element	FSK_DE_CT1 Opportunities Closed within a Territory FSK_DECTR1 Opportunities Committed to Close by Territory FSK_DE_FTR Sales Forecast by Territory
Model ID	FSK
Scenario	Not applicable

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

## FX Exposures: Deutsche Mark

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_FX_DEM
What this KPI does	This KPI monitors total exposures for Deutsche marks by business unit.
Calculation Description	
Calculation Expression	FSK_CURDEM
KPI Type	Manual
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_FX_DEM (FX Exposures: Deutsch Mark) DE: FSK_CURDEM
Calculation Definition (Calculation ID)	FSK_DEM

<b>Definition Detail</b>	<b>Value</b>
KPI Calculation Rule ID	FSK_DEM
Tablemap	LEDGER_F00
Datamap	LEDGER_F00
Filter	FSK_BASE_CUR_DEM FSK_GLAR
Constraint	FSK_BASE_CUR_DEM
Data Element	FSK_CURDEM
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit  Includes:  CORP1  CORP2
KPI Target Rule	Target Type = Numeric
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## FX Exposures: Spanish Peseta

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_FX_ESP
What this KPI does	This KPI monitors total exposures for Spanish peseta by business unit.
Calculation Description	
Calculation Expression	FSK_CURESP
KPI Type	Manual

<b>Definition Detail</b>	<b>Value</b>
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_FX_ESP (FX Exposures: Spanish Peseta) DE: FSK_CURESP
Calculation Definition (Calculation ID)	FSK_ESP
KPI Calculation Rule ID	FSK_ESP
Tablemap	LEDGER_F00
Datamap	LEDGER_F00
Filter	FSK_BASE_CUR_ESP FSK_GLAR
Constraint	FSK_BASE_CUR_ESP
Data Element	FSK_CURESP
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CORP1
KPI Target Rule	Target Type = Numeric
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## FX Exposures: Euro

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_FX_EUR
What this KPI does	This KPI monitors total exposures for the Euro by business unit.

<b>Definition Detail</b>	<b>Value</b>
Calculation Description	
Calculation Expression	FSK_CUREUR
KPI Type	Manual
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_FX_EUR (FX Exposures: Euro) DE: FSK_CUREUR
Calculation Definition (Calculation ID)	FSK_EUR
KPI Calculation Rule ID	FSK_EUR
Tablemap	LEDGER_F00
Datamap	LEDGER_F00
Filter	FSK_BASE_CUR_EUR FSK_GLAR
Constraint	FSK_BASE_CUR_EUR
Data Element	FSK_CUREUR
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CORP1
KPI Target Rule	Target Type = Numeric
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## FX Exposures: Pounds Sterling Silver

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_FX_GBP
What this KPI does	This KPI monitors total exposures for pound sterling silver ( GBP) by business unit.
Calculation Description	
Calculation Expression	FSK_CURGBP
KPI Type	Manual
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_FX_GBP (FX Exposures: Pounds Sterling Silver) DE: FSK_CURGBP
Calculation Definition (Calculation ID)	FSK_GBP
KPI Calculation Rule ID	FSK_GBP
Tablemap	LEDGER_F00
Datamap	LEDGER_F00
Filter	FSK_BASE_CUR_GBP FSK_GLAR
Constraint	FSK_BASE_CUR_GBP
Data Element	FSK_CURGBP
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit  Includes: CORP1
KPI Target Rule	Target Type = Numeric
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## FX Exposures: US Dollar

This section discusses the KPI definition detail:

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



<b>Definition Detail</b>	<b>Value</b>
Critical Success Factor	Not applicable

## Total Headcount

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_HR01
What this KPI does	This KPI monitors actual head count of full-time employees by business unit.
Calculation Description	
Calculation Expression	FSK_A_HCNT
KPI Type	Manual
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_HR01 (Total Headcount) DE: FSK_A_HCNT (Actual Full-Time Employee Headcount) DE: FSK_HCOUNT (Budgeted Employee Headcount)
Calculation Definition (Calculation ID)	FSK_C_HEAD
KPI Calculation Rule ID	FSK_C_HEAD
Tablemap	JOBF_POSN
Datamap	JOBF_POSN
Filter	FSK_FULL_TIME_EMPL
Constraint	FSK_FULL_TIME_EMPL
Data Element	FSK_A_HCNT (Actual Full-Time Employee Headcount) FSK_HCOUNT (Budgeted Employee Headcount)
Model ID	FSK
Scenario	Not applicable

<b>Definition Detail</b>	<b>Value</b>
KPI Object	Business Unit  Includes:  CONSL  CORP1  COPR2  EPM01
KPI Target Rule	Target Type = % Target  Primary Target = FSK_HCOUNT (Budgeted Employee Headcount)
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Headcount Offers Extended

This section discusses the KPI definition detail:

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

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

## Purchasing Commitments

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_PO01
What this KPI does	This KPI monitors purchasing commitments by business unit.
Calculation Description	Committed purchase orders + Open purchase orders
Calculation Expression	FSK_COM_PO + FSK_OPENPO
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	KPI: FSK_PO01 (Purchasing Commitments) DE: FSK_COM_PO (Committed Purchase Orders) DE: FSK_OPENPO (Open Purchase Orders) DE: FSK_BGTEXP (Budgeted Expenses: Purchasing)
Calculation Definition (Calculation ID)	FSK_PRCHSN
KPI Calculation Rule ID	FSK_PRCHSN
Tablemap	FSK_PODIST
Datamap	FSK_PODIST
Filter	FSK_COMMITTED_POS FSK_OPEN_PO
Constraint	FSK_COMMITTED_POS FSK_OPEN_POS
Data Element	FSK_COM_PO (Committed Purchase Orders) FSK_OPENPO (Open Purchase Orders) FSK_BGTEXP (Budgeted Expenses: Purchasing)
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit Includes: CORP1
KPI Target Rule	Target Type = % Target  Primary Target = FSK_BGTEXP (Budgeted Expenses: Purchasing)

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

## Cash Position

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_TR01
What this KPI does	This KPI monitors cash position by business unit.
Calculation Description	This calculation uses KPIs instead of Data Elements
Calculation Expression	FSK_TR01 – FSK_PASCOL
KPI Type	Composite
Composite Pieces	KPIs used: <ul style="list-style-type: none"> <li>• FSK_TR01 (Expected collections this period).</li> <li>• FSK_PASCOL (Expected Collections last period).</li> </ul>
Data Used in the KPI	KPI: FSK_TR01 (Cash Position)
Calculation Definition (Calculation ID)	FSK_CSHCOL
KPI Calculation Rule ID	FSK_CSHCOL
Tablemap	FSK_POSTR FSK_CSTHST
Datamap	FSK_POSTR FSK_CSTHST
Filter	FSK_IMPCTHDR FSK_CUSTOMER_HIST
Constraint	FSK_POS_IMPACT_HDR FSK_CUSTOMER_HISTORY
Data Element	

<b>Definition Detail</b>	<b>Value</b>
Model ID	FSK
Scenario	Not applicable
KPI Object	Business Unit  Includes:  CONSL  CORP1  COPR2  EPM01
KPI Target Rule	Target Type = Numeric
Object Type (Dimension)	BUSINESS_UNIT
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Large Deal Maturities

This section discusses the KPI definition detail:

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

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

## Supplier Threshold

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_VEND1
What this KPI does	This KPI monitors supplier threshold by supplier ID.
Calculation Description	
Calculation Expression	FSK_VENDOR
KPI Type	Manual
Composite Pieces	Not applicable

<b>Definition Detail</b>	<b>Value</b>
Data Used in the KPI	KPI: FSK_VEND1 (Supplier Threshold) DE: FSK_VENDOR (Payments by Supplier)
Calculation Definition (Calculation ID)	FSK_VEND1
KPI Calculation Rule ID	FSK_VEND1
Tablemap	FSK_PYMNT
Datamap	FSK_PYMNT
Filter	FSK_SPECIFIC_VENDORS
Constraint	FSK_SPECIFIC_VENDORS
Data Element	FSK_VENDOR (Payments by Supplier)
Model ID	FSK
Scenario	Not applicable
KPI Object	Supplier  Includes these Supplier IDs:  1001  1002  1003  100
KPI Target Rule	Target Type = % Target  Primary Target = DFLT_TRGT (Default Target Table)
Object Type (Dimension)	SUPPLIER
Perspective Type	Not applicable
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Available Spending – Commitment Control

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_KK01



<b>Definition Detail</b>	<b>Value</b>
What this KPI does	This KPI will be used to show users the percentage of a budget that is available for consumption for a specified period of time.
Calculation Description	(Budgeted Amount – Spending Activity Balance)
Calculation Expression	(Budgeted Amount – Spending Activity Balance) (FSK_KK01E2 - FSK_KK01_A)
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_KK01
KPI Calculation Rule ID	FSK_KK01
Tablemap	FSK_LED_KK
Datamap	FSK_LED_KK Referenced Table(s): LEDGER_KK_F00
Filter	FSK_KK01_EB – Expenditure Budget – Supplies (Pointer) FSK_KK01_EB2 – Expenditure Budget – Supplies (Calc Defn) FSK_KK01_EA – Expenditure Activity – Supplies
Constraint	FSK_KK01_EXP_BUD – Expenditure Budget FSK_KK01_EXP_BUD2 – Expenditure Budget FSK_KK01_EXP_ACT – Expenditure Activity
Data Element	FSK_KK01_B – Budgeted Expenditure Amount by department (Pointer) FSK_KK01E2 – Budgeted Expenditure Amount by department (Calc Defn) FSK_KK01_A – Expenditure Activity by department
Model ID	FSK
Scenario	FSK_SCENAR

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

## Available Spending – Standard Budgets

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_GL01
What this KPI does	This KPI will be used to show users the percentage of a budget that is available for consumption for a specified period of time.
Calculation Description	(Budgeted Amount – Spending Activity Balance)
Calculation Expression	(Budgeted Amount – Spending Activity Balance) (FSK_GL01E2 - FSK_GL01_A)
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements

<b>Definition Detail</b>	<b>Value</b>
Calculation Definition (Calculation ID)	FSK_GL01
KPI Calculation Rule ID	FSK_GL01
Tablemap	FSK_LEDG FSK_LED_BD
Datamap	FSK_LEDG FSK_LED_BD Referenced Table(s): LEDGER2_F00 LEDGER_BUDG_F00
Filter	FSK_GL01_EB – Expenditure Budget – Supplies (Pointer) FSK_GL01_EB2 – Expenditure Budget – Supplies (Calc Defn) FSK_GL01_EA – Expenditure Activity – Supplies
Constraint	FSK_GL01_EXP_BUD – Expenditure Budget FSK_GL01_EXP_BUD2 – Expenditure Budget FSK_GL01_EXP_ACT – Expenditure Activity
Data Element	FSK_GL01_B – Budgeted Expenditure Amount by department (Pointer) FSK_GL01E2 – Budgeted Expenditure Amount by department (Calc Defn) FSK_GL01_A – Expenditure Activity by department
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Department(s): 11000 – Marketing 13000 - Finance
KPI Target Rule	Target Type: % Target Primary Target: FSK_GL01_B (Budgeted Expenditure Amount)
	<ul style="list-style-type: none"> <li>• Rule: Available Spending &gt;= .90</li> <li>• Action: Green</li> </ul>

<b>Definition Detail</b>	<b>Value</b>
	<ul style="list-style-type: none"> <li>• Rule: Available Spending &gt;= .76</li> <li>• Action: Yellow</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Available Spending &lt; .76</li> <li>• Action: Red</li> </ul>
Object Type (Dimension)	DEPARTMENT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Operating Activity to Plan – Commitment Control

This section discusses the KPI definition detail:

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

<b>Definition Detail</b>	<b>Value</b>
Filter	FSK_KK02_EB – Operating Expenditure Budget FSK_KK02_EA – Operating Expenditure Activity
Constraint	FSK_KK02_EXP_BUD – Operating Expenditure Budget FSK_KK02_EXP_ACT – Operating Expenditure Activity
Data Element	FSK_KK02_B – Budgeted Operating Expenditure Amount FSK_KK02_A – Operating Expenditure Activity
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Operating Unit(s): NEWYORK CALIF
KPI Target Rule	Target Type: % Target Primary Target: FSK_KK02_B (Budgeted Expenditure Amount)
	<ul style="list-style-type: none"> <li>• Rule: Percent Consumed &lt;= .75</li> <li>• Action: Green</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Percent Consumed &lt;= .90</li> <li>• Action: Yellow</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Percent Consumed &gt; .90</li> <li>• Action: Red</li> </ul>
Object Type (Dimension)	OPERATING_UNIT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Operating Activity to Plan – Standard Budgets

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_GL02

<b>Definition Detail</b>	<b>Value</b>
What this KPI does	This KPI will be used to show users the percentage of an operating level budget that has been consumed for a specified period of time.
Calculation Description	Operating Expenditure Activity
Calculation Expression	Operating Expenditure Activity FSK_GL02_A
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_GL02
KPI Calculation Rule ID	FSK_GL02
Tablemap	FSK_LEDG FSK_LED_BD
Datamap	FSK_LEDG FSK_LED_BD Referenced Table(s): LEDGER2_F00 LEDGER_BUDG_F00
Filter	FSK_GL02_EB – Operating Expenditure Budget FSK_GL02_EA – Operating Expenditure Activity
Constraint	FSK_GL02_EXP_BUD – Operating Expenditure Budget FSK_GL02_EXP_ACT – Operating Expenditure Activity
Data Element	FSK_GL02_B – Budgeted Operating Expenditure Amount FSK_GL02_A – Operating Expenditure Activity
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Operating Unit(s): NEWYORK CALIF

<b>Definition Detail</b>	<b>Value</b>
KPI Target Rule	Target Type: % Target Primary Target: FSK_GL02_B (Budgeted Expenditure Amount)
	<ul style="list-style-type: none"> <li>Rule: Percent Consumed &lt;= .75</li> <li>Action: Green</li> </ul>
	<ul style="list-style-type: none"> <li>Rule: Percent Consumed &lt;= .90</li> <li>Action: Yellow</li> </ul>
	<ul style="list-style-type: none"> <li>Rule: Percent Consumed &gt; .90</li> <li>Action: Red</li> </ul>
Object Type (Dimension)	OPERATING_UNIT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Projected Operating Activity to Plan – Commitment Control

This section discusses the KPI definition detail:

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

<b>Definition Detail</b>	<b>Value</b>
KPI Calculation Rule ID	FSK_KK03
Tablemap	FSK_LEDKKP
Datamap	FSK_LEDKKP Referenced Table(s): LEDGER_KK2_VW – Excludes Accounting Period
Filter	FSK_KK03_EB – Operating Expenditure Budget FSK_KK03_EA – Operating Expenditure Activity
Constraint	FSK_KK03_EXP_BUD – Operating Expenditure Budget FSK_KK03_EXP_ACT – Operating Expenditure Activity
Data Element	FSK_KK03_B – Budgeted Operating Expenditure Amount (Sum PTA across all APs) FSK_KK03_A – Operating Expenditure Activity (Sum PTA where AP < %AP)
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Operating Unit(s): NEWYORK CALIF
KPI Target Rule	Target Type: % Target Primary Target: FSK_KK03_B (Budgeted Expenditure Amount)
	<ul style="list-style-type: none"> <li>• Rule: Projected Pct Consumed &lt;= .80</li> <li>• Action: Green</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Projected Pct Consumed &lt;= .95</li> <li>• Action: Yellow</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Projected Pct Consumed &gt; .95</li> <li>• Action: Red</li> </ul>
Object Type (Dimension)	OPERATING_UNIT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable



<b>Definition Detail</b>	<b>Value</b>
Critical Success Factor	Not applicable

## Projected Operating Activity to Plan – Standard Budgets

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_GL03
What this KPI does	This KPI will provide users with a projected view of a budget's available spending balance. The KPI will account for budgeted amounts and spending activity throughout the year and display a projected percentage of budget, that will be consumed given the current rate of spending.
Calculation Description	Operating Expenditure Activity
Calculation Expression	Operating Expenditure Activity (FSK_GL03_A / %AccountingPeriod) * %NumberOfPeriods
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_GL03
KPI Calculation Rule ID	FSK_GL03
Tablemap	FSK_LEDG_P FSK_LEDBDP
Datamap	FSK_LEDG_P FSK_LEDBDP Referenced Table(s): LEDGER_GL2_VW – Excludes Accounting Period LEDGER_BUDG2_VW – Excludes Accounting Period
Filter	FSK_GL03_EB – Operating Expenditure Budget FSK_GL03_EA – Operating Expenditure Activity
Constraint	FSK_GL03_EXP_BUD – Operating Expenditure Budget FSK_GL03_EXP_ACT – Operating Expenditure Activity

<b>Definition Detail</b>	<b>Value</b>
Data Element	FSK_GL03_B – Budgeted Operating Expenditure Amount (Sum PTA across all APs)  FSK_GL03_A – Operating Expenditure Activity (Sum PTA where AP < %AP)
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Operating Unit(s):  NEWYORK  CALIF
KPI Target Rule	Target Type: % Target  Primary Target: FSK_GL03_B (Budgeted Expenditure Amount)
	<ul style="list-style-type: none"> <li>• Rule: Projected Pct Consumed &lt;= .80</li> <li>• Action: Green</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Projected Pct Consumed &lt;= .95</li> <li>• Action: Yellow</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Projected Pct Consumed &gt; .95</li> <li>• Action: Red</li> </ul>
Object Type (Dimension)	OPERATING_UNIT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Project Gross Profit to Plan – Commitment Control

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_KK04
What this KPI does	This KPI will be used to show users the budgeted gross profit as compared to the actual gross profit for a specified project and period of time.

<b>Definition Detail</b>	<b>Value</b>
Calculation Description	(Recognized Project Revenue Activity - Project Expenditure Activity)
Calculation Expression	(Recognized Project Revenue Activity - Project Expenditure Activity)  (%NegativeOne * FSK_GL04RA) - FSK_GL04EA
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_KK04
KPI Calculation Rule ID	FSK_KK04
Tablemap	FSK_LED_KK
Datamap	FSK_LED_KK  Referenced Table(s):  LEDGER_KK_F00
Filter	FSK_KK04_RA – Recognized Project Revenue Activity  FSK_KK04_EA – Project Expenditure Activity
Constraint	FSK_KK04_REV_AC – Recognized Project Revenue Activity  FSK_KK04_EXP_AC – Project Expenditure Activity
Data Element	FSK_KK04RA – Recognized Project Revenue Activity  FSK_KK04EA – Project Expenditure Activity
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Project ID(s):  FACTORY  PLANT
KPI Target Rule	Target Type: % Target  Primary Target: Default Target Table
	<ul style="list-style-type: none"> <li>• Rule: Actual Gross Profit &gt;= .90</li> <li>• Action: Green</li> </ul>

<b>Definition Detail</b>	<b>Value</b>
	<ul style="list-style-type: none"> <li>• Rule: Actual Gross Profit &gt;= .76</li> <li>• Action: Yellow</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Actual Gross Profit &lt; .76</li> <li>• Action: Red</li> </ul>
Object Type (Dimension)	PROJECT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Project Gross Profit to Plan – Standard Budgets

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_GL04
What this KPI does	This KPI will be used to show users the budgeted gross profit as compared to the actual gross profit for a specified project and period of time.
Calculation Description	(Recognized Project Revenue Activity - Project Expenditure Activity)
Calculation Expression	(Recognized Project Revenue Activity - Project Expenditure Activity)  (%NegativeOne * FSK_GL04RA) - FSK_GL04EA
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_GL04
KPI Calculation Rule ID	FSK_GL04
Tablemap	FSK_LEDG
Datamap	FSK_LEDG  Referenced Table(s):  LEDGER2_F00

<b>Definition Detail</b>	<b>Value</b>
Filter	FSK_GL04_RA – Recognized Project Revenue Activity FSK_GL04_EA – Project Expenditure Activity
Constraint	FSK_GL04_REV_AC – Recognized Project Revenue Activity FSK_GL04_EXP_AC – Project Expenditure Activity
Data Element	FSK_GL04RA – Recognized Project Revenue Activity FSK_GL04EA – Project Expenditure Activity
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Project ID(s): FACTORY PLANT
KPI Target Rule	Target Type: % Target Primary Target: Default Target Table
	<ul style="list-style-type: none"> <li>• Rule: Actual Gross Profit &gt;= .90</li> <li>• Action: Green</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Actual Gross Profit &gt;= .76</li> <li>• Action: Yellow</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Actual Gross Profit &lt; .76</li> <li>• Action: Red</li> </ul>
Object Type (Dimension)	PROJECT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Gross Margin to Plan – Commitment Control

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_KK05

<b>Definition Detail</b>	<b>Value</b>
What this KPI does	This KPI will be used to show users the budgeted gross profit margin as compared to the actual gross profit margin for a specified product and period of time.
Calculation Description	Product Revenue Amount - Product Expenditure Activity / Product Revenue Amount
Calculation Expression	Product Revenue Amount - Product Expenditure Activity / Product Revenue Amount  (((%NegativeOne * FSK_KK05RA) - FSK_KK05EA) / (%NegativeOne * FSK_KK05RA)) * 100
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_KK05
KPI Calculation Rule ID	FSK_KK05
Tablemap	FSK_LED_KK
Datamap	FSK_LED_KK  Referenced Table(s):  LEDGER_KK_F00
Filter	FSK_KK05_RA – Recognized Product Revenue Activity  FSK_KK05_EA – Product Expenditure Activity
Constraint	FSK_KK05_REV_AC – Recognized Product Revenue Activity  FSK_KK05_EXP_AC – Product Expenditure Activity
Data Element	FSK_KK05RA – Recognized Product Revenue Activity  FSK_KK05EA – Product Expenditure Activity
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Product(s):  PRNTRS  SERVRS

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

## Gross Margin to Plan – Standard Budgets

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_GL05
What this KPI does	This KPI will be used to show users the budgeted gross profit margin as compared to the actual gross profit margin for a specified product and period of time.
Calculation Description	Product Revenue Amount - Product Expenditure Activity / Product Revenue Amount
Calculation Expression	Product Revenue Amount - Product Expenditure Activity / Product Revenue Amount  (((%NegativeOne * FSK_GL05RA) - FSK_GL05EA) / (%NegativeOne * FSK_GL05RA)) * 100
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_GL05

<b>Definition Detail</b>	<b>Value</b>
KPI Calculation Rule ID	FSK_GL05
Tablemap	FSK_LED_GL
Datamap	FSK_LED_GL Referenced Table(s): LEDGER_GL_F00
Filter	FSK_GL05_RA – Recognized Product Revenue Activity FSK_GL05_EA – Product Expenditure Activity
Constraint	FSK_GL05_REV_AC – Recognized Product Revenue Activity FSK_GL05_EXP_AC – Product Expenditure Activity
Data Element	FSK_GL05RA – Recognized Product Revenue Activity FSK_GL05EA – Product Expenditure Activity
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Product(s): PRNTRS SERVRS
KPI Target Rule	Target Type: % Target Primary Target: Default Target Table
	<ul style="list-style-type: none"> <li>• Rule: Actual Gross Profit &gt;= .90</li> <li>• Action: Green</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Actual Gross Profit &gt;= .76</li> <li>• Action: Yellow</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Actual Gross Profit &lt; .76</li> <li>• Action: Red</li> </ul>
Object Type (Dimension)	PRODUCT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable



## Capital Expenditure Activity to Plan – Commitment Control

This section discusses the KPI definition detail:

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

<b>Definition Detail</b>	<b>Value</b>
KPI Target Rule	Target Type: % Target Primary Target: FSK_KK06_B (Budgeted Capital Expenditure Amount)
	<ul style="list-style-type: none"> <li>• Rule: Percent Consumed &lt;= .75</li> <li>• Action: Green</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Percent Consumed &lt;= .90</li> <li>• Action: Yellow</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Percent Consumed &gt; .90</li> <li>• Action: Red</li> </ul>
Object Type (Dimension)	PROJECT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Capital Expenditure Activity to Plan – Standard Budgets

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_GL06
What this KPI does	This KPI will be used to show users the percentage of a capital expenditure budget that has been consumed for a specified period of time.
Calculation Description	FSK_GL06 – Capital Expenditure Activity to Plan
Calculation Expression	FSK_GL06 – Capital Expenditure Activity to Plan FSK_GL06_A
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_GL06
KPI Calculation Rule ID	FSK_GL06

<b>Definition Detail</b>	<b>Value</b>
Tablemap	FSK_LEDG FSK_LED_BD
Datamap	FSK_LEDG FSK_LED_BD Referenced Table(s): LEDGER2_F00 LEDGER_BUDG_F00
Filter	FSK_GL06_EB – Capital Expenditure Budget FSK_GL06_EA – Capital Expenditure Activity
Constraint	FSK_GL06_EXP_BUD – Capital Expenditure Budget FSK_GL06_EXP_ACT – Capital Expenditure Activity
Data Element	FSK_GL06_B – Budgeted Capital Expenditure Amount FSK_GL06_A – Capital Expenditure Activity
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Project(s): FACTORY PLANT
KPI Target Rule	Target Type: % Target Primary Target: FSK_GL06_B (Budgeted Capital Expenditure Amount)
	<ul style="list-style-type: none"> <li>• Rule: Percent Consumed &lt;= .75</li> <li>• Action: Green</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Percent Consumed &lt;= .90</li> <li>• Action: Yellow</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Percent Consumed &gt; .90</li> <li>• Action: Red</li> </ul>
Object Type (Dimension)	PROJECT
Perspective Type	Financial

<b>Definition Detail</b>	<b>Value</b>
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Projected Capital Expenditure Activity to Plan – Commitment Control

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_KK07
What this KPI does	This KPI will provide users with a projected view of a capital budget's available spending balance. The KPI will account for budgeted amounts and spending activity throughout the year and display a projected percentage of budget, that will be consumed given the current rate of spending.
Calculation Description	(Capital Expenditure Activity / Current Accounting Period) * Number Of Accounting Periods in the fiscal year
Calculation Expression	(Capital Expenditure Activity / Current Accounting Period) * Number Of Accounting Periods in the fiscal year  (FSK_KK07_A / %AccountingPeriod) * %NumberOfPeriods
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_KK07
KPI Calculation Rule ID	FSK_KK07
Tablemap	FSK_LEDKKP
Datamap	FSK_LEDKKP  Referenced Table(s):  LEDGER_KK_VW – Excludes Accounting Period
Filter	FSK_KK07_EB – Capital Expenditure Budget  FSK_KK07_EA – Capital Expenditure Activity
Constraint	FSK_KK07_EXP_BUD – Capital Expenditure Budget  FSK_KK07_EXP_ACT – Capital Expenditure Activity

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

## Projected Capital Expenditure Activity to Plan – Standard Budgets

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_GL07
What this KPI does	This KPI will provide users with a projected view of a capital budget's available spending balance. The KPI will account for budgeted amounts and spending activity throughout the year and display a projected percentage of budget, that will be consumed given the current rate of spending.

<b>Definition Detail</b>	<b>Value</b>
Calculation Description	(Capital Expenditure Activity / Current Accounting Period) * Number Of Accounting Periods in the fiscal year
Calculation Expression	(Capital Expenditure Activity / Current Accounting Period) * Number Of Accounting Periods in the fiscal year  (FSK_GL07_A / %AccountingPeriod) * %NumberOfPeriods
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_GL07
KPI Calculation Rule ID	FSK_GL07
Tablemap	FSK_LEDG_P  FSK_LEDBDP
Datamap	FSK_LEDG_P  FSK_LEDBDP  Referenced Table(s):  LEDGER2_VW – Excludes Accounting Period
Filter	FSK_GL07_EB – Capital Expenditure Budget  FSK_GL07_EA – Capital Expenditure Activity
Constraint	FSK_GL07_EXP_BUD – Capital Expenditure Budget  FSK_GL07_EXP_ACT – Capital Expenditure Activity
Data Element	FSK_GL07_B – Budgeted Capital Exp Amount (Sum PTA across all APs)  FSK_GL07_A – Capital Expenditure Activity (Sum PTA where AP < %AP)
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Project(s):  FACTORY  PLANT

<b>Definition Detail</b>	<b>Value</b>
KPI Target Rule	Target Type: % Target Primary Target: FSK_GL07_B (Budgeted Capital Expenditure Amount)
	<ul style="list-style-type: none"> <li>• Rule: Projected Pct Consumed &lt;= .80</li> <li>• Action: Green</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Projected Pct Consumed &lt;= .95</li> <li>• Action: Yellow</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Projected Pct Consumed &gt; .95</li> <li>• Action: Red</li> </ul>
Object Type (Dimension)	PROJECT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Recognized Revenue to Plan – Commitment Control

This section discusses the KPI definition detail:

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

<b>Definition Detail</b>	<b>Value</b>
Datamap	FSK_LED_KK Referenced Table(s): LEDGER_KK_F00
Filter	FSK_KK08_RB – Budgeted Product Revenue FSK_KK08_RA – Recognized Product Revenue Activity
Constraint	FSK_KK08_REV_BUD – Budgeted Product Revenue FSK_KK08_REV_ACT – Recognized Product Revenue Activity
Data Element	FSK_KK08_B – Budgeted Product Revenue Amount (Pointer) FSK_KK08_A – Recognized Product Revenue Activity
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Product(s) :SERVRS PRNTRS
KPI Target Rule	Target Type: % Target Primary Target: FSK_KK08_B (Budgeted Product Revenue Amount)
	<ul style="list-style-type: none"> <li>• Rule: Percent Recognized &gt;= .90</li> <li>• Action: Green</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Percent Recognized &gt;= .76</li> <li>• Action: Yellow</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Percent Recognized &lt; .76</li> <li>• Action: Red</li> </ul>
Object Type (Dimension)	PRODUCT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable



## Recognized Revenue to Plan – Standard Budgets

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_GL08
What this KPI does	This KPI will be used to show users the percentage of product revenue budget that has been recognized for a specified period of time.
Calculation Description	FSK_GL08 – Recognized Revenue to Plan
Calculation Expression	(%NegativeOne * FSK_GL08_A)
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_GL08
KPI Calculation Rule ID	FSK_GL08
Tablemap	FSK_LEDG FSK_LED_BD
Datamap	FSK_LEDG FSK_LED_BD Referenced Table(s): LEDGER2_F00 LEDGER_BUDG_F00
Filter	FSK_GL08_RB – Budgeted Product Revenue FSK_GL08_RA – Recognized Product Revenue Activity
Constraint	FSK_GL08_REV_BUD – Budgeted Product Revenue FSK_GL08_REV_ACT – Recognized Product Revenue Activity
Data Element	FSK_GL08_B – Budgeted Product Revenue Amount (Pointer) FSK_GL08_A – Recognized Product Revenue Activity
Model ID	FSK
Scenario	FSK_SCENAR

<b>Definition Detail</b>	<b>Value</b>
KPI Object	Product(s): SERVRS PRNTRS
KPI Target Rule	Target Type: % Target Primary Target: FSK_GL08_B (Budgeted Product Revenue Amount)
	<ul style="list-style-type: none"> <li>• Rule: Percent Recognized &gt;= .90</li> <li>• Action: Green</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Percent Recognized &gt;= .76</li> <li>• Action: Yellow</li> </ul>
	<ul style="list-style-type: none"> <li>• Rule: Percent Recognized &lt; .76</li> <li>• Action: Red</li> </ul>
Object Type (Dimension)	PRODUCT
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

## Payroll to Target – Standard Budgets

This section discusses the KPI definition detail:

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

<b>Definition Detail</b>	<b>Value</b>
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_GL09
KPI Calculation Rule ID	FSK_GL09
Tablemap	FSK_LEDG FSK_LED_BD
Datamap	FSK_LEDG FSK_LED_BD Referenced Tables: LEDGER_GL_VW LEDGER_BUDG_VW
Filter	FSK_GL09_EB FSK_GL09_EA
Constraint	FSK_GL09_EXP_BUD FSK_GL09_EXP_ACT
Data Element	FSK_GL09_B FSK_GL09_A
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Business Unit: CORP1
KPI Target Rule	Target Type = % Target  Primary Target = FSK_GL09_B (Budgeted Payroll Expenditure Amount)
	Percent Consumed <= .75 Green
	Percent Consumed <= .90 Yellow
	Percent Consumed > .90 Red
Object Type (Dimension)	Business Unit

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

**Note:** This KPI is calculated on quarterly periods while the underlying source table has monthly period data. The view PS\_LEDGER\_F00\_VW2, used in the Tablemap and Datamap, handles the mapping from the detail ledger period to the quarterly period.

## Payroll to Target – Commitment Control

This section discusses the KPI definition detail:

<b>Definition Detail</b>	<b>Value</b>
KPI Definition (KPI ID)	FSK_KK09
What this KPI does	This KPI shows the percentage of a payroll budget that has been consumed for a specified period of time. Obtains and displays results based on data from the commitment control ledger (for example, LEDGER_KK).
Calculation Description	FSK_KK09 – Payroll Expenditure Activity to Plan  Payroll Expenditure Activity / Budgeted Payroll Expenditure Amount
Calculation Expression	Payroll Expenditure Activity / Budgeted Payroll Expenditure Amount  (FSK_KK09_A / FSK_KK09_B)
KPI Type	Calculated
Composite Pieces	Not applicable
Data Used in the KPI	Same as Data Elements
Calculation Definition (Calculation ID)	FSK_KK09
KPI Calculation Rule ID	FSK_KK09
Tablemap	FSK_LED_KK
Datamap	FSK_LED_KK  Referenced Tables:  LEDGER_KK_VW

<b>Definition Detail</b>	<b>Value</b>
Filter	FSK_KK09_EB FSK_KK09_EA
Constraint	FSK_KK09_EXP_BUD FSK_KK09_EXP_ACT
Data Element	FSK_KK09_B FSK_KK09_A
Model ID	FSK
Scenario	FSK_SCENAR
KPI Object	Business Unit: CORP1
KPI Target Rule	Actual Value Payroll Expenditure Activity
	Current Target Budgeted Payroll Expenditure Amount
	% of Target Percentage Consumed
Object Type (Dimension)	Business Unit
Perspective Type	Financial
KPI Cause/Effect (KPIs affected by this KPI)	Not applicable
Critical Success Factor	Not applicable

**Note:** This KPI is calculated on quarterly periods while the underlying source table has monthly period data. The view PS\_LEDGER\_F00\_VW2, used in the tablemap and datamap, handles the mapping from the detail ledger period to the quarterly period.

