Oracle® Incentive Compensation

Implementation Guide

Release 11*i*

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Oracle Incentive Compensation Implementation Guide, Release 11*i*

Part No. B12226-02

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Oracle Incentive Compensation Implementation Guide, Release 11*i*

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Preface

Welcome to the Oracle Incentive Compensation Implementation Guide, Release 11*i*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.

- Oracle Incentive Compensation.

  If you have never used Oracle Incentive Compensation, Oracle suggests you attend one or more of the Oracle Applications training classes available through Oracle University.

- Oracle Self-Service Web Applications.

  To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

The Oracle Incentive Compensation Implementation Guide contains the information you need to understand and use Oracle Incentive Compensation. This guide contains four chapters:

- Chapter 1 describes mandatory dependencies and integrations with other Oracle products.

- Chapter 2 comprises the basic implementation steps for Oracle Incentive Compensation.

- Chapter 3 has the steps for implementing Incentive Planning, an optional but useful part of the Incentive Compensation process.

- Chapter 4 contains steps for implementing Sales Credit Allocation, an optional feature.

- Appendix A contains a detailed listing of flexfields used in Oracle Incentive Compensation.

- Appendix B presents the lookups used in Oracle Incentive Compensation, updated for this latest release of the product.

- Appendix C details the profile options used in this release of Oracle Incentive Compensation.

- Appendix D shows the different responsibilities used in Oracle Incentive Compensation and the access each responsibility has to the tabs in the application.

- The Index makes it easy for users to find specific information.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including documentation, training, and support services, to increase your knowledge and understanding of Oracle Incentive Compensation.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF Documentation-** See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on Oracle*MetaLink* and is updated frequently.

- **Online Help -** You can refer to Oracle iHelp for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.

- **11i Release Content Document -** Refer to the Release Content Document for new features listed release. The Release Content Document is available on Oracle*MetaLink*.

- **About document -** Refer to the About document for patches that you have installed to learn about new documentation or documentation patches that you can download. The new About document is available on Oracle*MetaLink*.

Related Guides

Oracle Incentive Compensation shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Incentive Compensation.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Guides Related to This Product

Oracle Incentive Compensation User Guide

Use this user guide to manage Oracle Incentive Compensation on a day-to-day basis. Learn how to distribute quota, create compensation plans, collect transactions, and calculate and pay commission. See how to use Incentive Planning and modeling. The new Sales Credit Allocation feature is presented in detail.

Oracle Incentive Compensation Technical Reference Manual

Use this manual to obtain the specific technical details used in setting up Oracle Incentive Compensation.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

"About" Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the "About" document for your product. "About" documents are available on Oracle*MetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual

also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Incentive Compensation implementation team, as well as for users

responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle*Metalink*

Oracle Applications Message Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Incentive Compensation and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many education centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Incentive Compensation working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

1

Mandatory Dependencies and Integrations

This chapter contains information on the mandatory dependencies without which Oracle Incentive Compensation will not run, and the optional integrations that provide additional functionality for users of the application.

- Section 1.1, "Mandatory Dependencies"
- Section 1.2, "Integrations"

1.1 Mandatory Dependencies

Oracle Incentive Compensation requires the following related products and components to be installed and implemented:

- Oracle Resource Manager
- Oracle General Ledger
- Web ADI

Resource Manager is the common source for resource definition. The ability of Oracle Incentive Compensation to read Resource Manager directly eliminates the need to create commonly used definitions and relationships in multiple applications. Use Resource Manager to:

- Create resources
- Create sales roles and assign them to resources
    - Create compensation groups, the basis of a sales hierarchy
    - Create hierarchies

Oracle General Ledger contains all of the accounting information that is used by Oracle Incentive Compensation. Everything that is necessary for running Oracle Incentive Compensation is included during setup.

This release uses **Web ADI** (Application Desktop Integration) to download the Commission Statement report.

1.1.1 Oracle Resource Manager

Use Resource Manager to:

- Create resources

- Create sales roles and assign them to resources

- Create compensation groups and teams

- Create hierarchies

Refer to appropriate sections of the *Oracle Common Application Components Implementation Guide* or *Oracle Common Application Components User Guide*.

Create Resources

In order for a resource to receive commission payments in Oracle Incentive Compensation, the resource must be created, assigned a sales compensation role and assigned a compensation group. The roles and groups are created in Resource Manager, and the assignment takes place when the resources, if they are employees, are imported from HR. Resources that are not salespeople, for example, nonemployees set up as supplier vendors or TBH (to be hired), are not imported from HR, but are created directly in Resource Manager. See the Creating and Importing Resources chapter in the *Oracle Common Application Components Implementation Guide* for the procedures.

Create and Assign Sales Roles

In Oracle Incentive Compensation, compensation plans are assigned to roles, and the salespeople are assigned a role. A Role may encompass one or more job descriptions and job titles. Within the role type used for Oracle Incentive Compensation, roles are assigned to resources, resource groups and resource teams. Oracle Resource Manager is delivered with pre-defined roles for all CRM modules, including Oracle Incentive Compensation, however you can define additional custom roles for your enterprise. See the Managing Roles and Role Types chapter in the *Oracle Common Application Components Implementation Guide* for the steps for this procedure.

Create Compensation Groups

Resources must belong to a group to receive payments in Oracle Incentive Compensation. Groups are created in Resource Manager. A group is based on the similar functionality or roles of its members. Groups exist in a hierarchy, with parent and child groups defining the structure of the sales organization.

A Team is a type of group in which the members work together to complete a project. Teams and groups are both created in Resource Manager, and are assigned when you import the resource from HR. See the Managing Teams and Groups chapter in the *Oracle Common Application Components Implementation Guide.*

Create Hierarchies

In Resource Manager, when you set up resources and groups, you select reporting hierarchies, which determine who has access to information. These include Sales and Telesales, Sales Compensation, Sales Force Planning, and Compensation Reporting Hierarchy.

The Compensation Reporting Hierarchy usage in Resource Manager determines user access to the Commission Statement report. This usage makes it easier to set up reporting structures so that managers have access to commission statements for the people that report to them. This usage can be selected within a site-level system profile, OSC: Reporting Hierarchy (See Appendix C, "System Profile Options".

1.2 Integrations

These are integrations for Oracle Incentive Compensation:

- Oracle Receivables
- Oracle Order Management
- Oracle Field Sales
- Oracle Payable
- Oracle Payroll
- Oracle Quoting
- Oracle Territory Manager
- Oracle Human Resources
- Oracle Workflow
- Oracle Sales

As a customization, you can use application programming interfaces (APIs), to bring transactions into Oracle Incentive Compensation and to send transactions out to other systems.

Oracle Incentive Compensation exchanges information with other products within the Oracle e-Business Suite. Transactions are primarily collected from Oracle Receivables and Oracle Order Management. Oracle Incentive Compensation transactions can originate from a sales order, a customer billing, a customer payment, or other business functions.

From **Oracle Receivables**, you can collect these types of transaction data:

- Invoices

- Credit and debit memos

- Payment postings

- Write-off postings

- Take-back (claw-back) postings, which are generated when an invoice due date goes beyond the set grace period. The credit for the sale is deducted from the resource's sales credit.

- Give-back postings, which are generated when a past due invoice that has been deducted from the resource's sales credit is paid. The resource receives the credit.

- Revenue Adjustment Module (RAM) Adjustments, which makes transaction adjustments one time, in Oracle Receivables using RAM (Revenue Adjustment Module), and collects the adjustments into Oracle Incentive Compensation.

From **Oracle Order Management**, you can collect booked orders and adjustments to booked orders. In release 11*i* of Oracle Applications, Order Management replaces the Order Entry system interface for collecting order information.

Oracle Field Sales uses Oracle Incentive Compensation to provide a sales performance and compensation forecasting tool for sales representatives and managers, based on current compensation plans. Oracle Incentive Compensation also provides the means for monitoring sales force performance through self-service compensation reports, the Year-to-Date Commission Summary and the Quota Performance Report. Resources can use Oracle Field Sales to view projected compensation based on opportunities they enter into the system or commit to the forecast. See Section 1.2.1, "Oracle Field Sales".

Oracle Payable is used to pay people who are not full-time, regular employees. Oracle Payable recognizes resources for payment only if they are activated as suppliers. See Section 1.2.2, "Oracle Payable".

Oracle Payroll is used by the application to pay employees. See Section 1.2.3, "Oracle Payroll".

Oracle Quoting uses Oracle Incentive Compensation to project commissions for resources and for Sales Credit Allocation. Oracle Incentive Compensation receives data through an API and then sends back projected commissions to Oracle Quoting. Because the projected commissions calculator is less complex than a compensation plan, the projections are approximate. The more complex the compensation plan, the more inaccurate the projection can be. See Section 1.2.4, "Oracle Quoting or Third Party Quoting Application".

Oracle Territory Manager provides integration with the Territory Assignment Engine for Sales Credit Allocation. See Section 1.2.5, "Oracle Territory Manager" and Chapter 4, "Implementing Sales Credit Allocation".

Oracle Sales needs to have a connection set up in order to provide resources access to their commission statements. See

Oracle Human Resources is where you must first create employees in order for them to be paid compensation in Oracle Incentive Compensation. After creating employees in Human Resources, you then import these records into Resource Manager to create resources. See Oracle Human Resources documentation for the procedures for creating employees.

Oracle Workflow is a workflow management system that is used by Oracle Incentive Compensation to integrate business processes. It can be used to notify individuals that action is required, a process is complete, or that a concurrent process has run into a problem. Workflow is already configured for use in Oracle Incentive Compensation and does not require any setups.

1.2.1 Oracle Field Sales

After you enable access to the Compensation tab in Oracle Field Sales, you can create all compensation plan setups in the HTML version of Oracle Incentive Compensation. To log in to Oracle Field Sales, use the username and password that you create in step 3.

Login
Log in to Oracle Forms.

Responsibility

System Administrator

Steps

1. Create an employee in HRMS manager (see the *HRMS User Guide* for details) or a supplier vendor in Oracle Payable for a nonemployee see the *Oracle Payables User Guide*).

2. Import the resource into Resource Manager.

   This is necessary so that Oracle Incentive Compensation can use the names to set up resource hierarchies and assign roles to resources (see the *Resource Manager User Guide* for details).

3. Create a username and password for the resource in System Administrator with Oracle Field Sales usage.

   a. In the System Administrator Navigator, select Security.

   b. Expand the Security menu by double-clicking on Security.

   c. Double-click User.

   d. Double-click Define.

   e. Enter your User's name in the User Name field. Start the search from the Menu bar by clicking **View** > **Query by Example** > Run. (Pressing the Control key and the F11 key together performs the same function.)

   f. Assign Sales Online User responsibility to the user. This is necessary for the resource to access the Compensation tab.

   g. Save.

4. Switch responsibility to Resource Manager.

5. In Resource Manager, assign the role type of Sales to the user with a manager or member role. Resource Manager is shared with multiple products. The role type identifies records created by Sales products.

   a. Double-click Maintain Resources.

   b. Double-click Resources.

   c. Search for the resource.

   d. Click Resource Details.

   e. Assign the Sales role type.

    f.   Save.

6. Assign Group usage Sales and Telesales for the group to which the user belongs. This indicates which products own the group.

    a.   In the Resource Manager main menu, double-click Maintain Resources.

    b.   Double-click Groups.

    c.   Search for the resource's group name.

    d.   Click the Usage tab.

    e.   Enter the Sales and Telesales usage.

    f.   Save.

1.2.1.1 Planning

Planning allows both managers and resources to provide feedback about the estimated sales amount that they feel is achievable.

Prerequisites

A compensation plan must already be created.

Login

Log in to Oracle HTML Applications.

Responsibility

Field Sales Manager (Oracle Field Sales)

Field Sales User (Oracle Field Sales)

Sales Force Incentive Compensation User (OIC)

Navigation

Compensation > Planning

Steps

1. Click the Compensation tab and click the Planning subtab.

    The My Compensation Groups page appears.

2. Select an organization from the drop-down list.

3. Select an effective date. You can click the calendar icon to open a date picker.

4. Any compensation groups within the parameters is displayed below.

1.2.1.2 Compensation Plan

This subtab is divided into two areas: My Compensation Plans and My Salespeople.

As a manager, you can see compensation plans for which you are responsible in the first area and also the resources to whom the plans can be assigned. You can then distribute compensation plans in the My Salespeople area.

Prerequisites

A compensation plan must already be created.

Login

Log in to Oracle HTML Applications.

Responsibility

Field Sales Manager (Oracle Field Sales)

Navigation

Compensation > Compensation Plan

Steps

1. In the Distribute column, check the box for each plan you want to distribute.

2. Click **Distribute**.

1.2.1.3 Income Planner

Income planner enables resources to plan their sales volumes to reach their commission earning goals. A resource can enter a Commission Forecast number and see the amount of commission he or she will earn, based on their compensation plan. Click the Compensation tab in Oracle Field Sales to access Income Planner.

Before you can use Income Planner in Oracle Field Sales, you need to assign forecast input and output formulas to your Compensation Plan in Oracle Incentive Compensation. The forecast formulas are the same as the formulas used in the elements of your compensation plan, except that you must insert Forecast Amount as a calculation expression in order to use Income Planner in Oracle Field Sales.

Note: Income Planner does not project income on bonus plan elements. Forecast expressions cannot be assigned to a bonus formula.

Login
Log in to Oracle HTML Applications

Responsibility
Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation
Incentive > Expression > Create

Steps
To create Forecast expressions, do the following:

1. Enter a name for the input formula.

2. In the Details area, select Others from the Type drop-down list.

3. Enter Forecast Amount from the Calculation Values block to the Expression block.

4. Add any other elements to the Expression block that you need. Forecast Amount MUST be one of the elements selected as part of your expression if the expression is to be used in Oracle Field Sales.

5. Click **Update** to save the input expression.

6. Repeat steps 1 through 5 to create an output expression.

   Note: The output expression must contain Rate Table Result as the first element selected and Forecast Amount should appear in the expression as well.

7. Click **Update** to save your output expression.

To assign your Forecast expressions to the formula in your plan element, do the following:

1. Click the Formula subtab in the Incentive tab.

2. Select the formula you want from the table or use the search parameters to search by name, type, or status.

The Formula Definition page appears.

3. Click the Expressions link to open the Expressions page.

4. In the Input area, select your input forecast expression from the drop-down list.

5. In the Output area, select your output forecast expression from the drop-down list.

6. Click **Update**.

7. Perform this series of steps for each formula that corresponds to a plan element used in Income Planner.

Example

For example, a resource's compensation is based on a revenue quota and the rate table tiers relate to achievement as a percentage of the quota. Because the forecast results are hypothetical figures, the forecast formula does not affect the actual achievement result. In this case, suppose the input forecast formula is Forecast amount/TARGET and the output forecast formula is Rate Table Result*Forecast amount. The input formula expresses the proportion of the forecast amount to the quota, and the output formula applies a commission rate to the forecast amount.

Guidelines

Multi-dimensional rate tables and split rates do not work for Income Planner.

A forecast amount based on each plan element is displayed if the Interest Type or Product Category from Oracle Sales is mapped to the plan element.

A resource can forecast commission only for periods for which commission has not yet been calculated.

1.2.1.4 Reports

Users of Oracle Field Sales can click the Reports subtab of the Compensation tab to see these Oracle Incentive Compensation reports:

- Year to Date Summary: This report is an overview of a resource's achievements, commission and bonus earnings and advances or draws. The figures are grouped by period and by plan element. The SuperUser can control which plan element appears as a quota or bonus category through the Quota Group box on the Plan Element form. The payout section is grouped by earnings type and by period.

- Quota Performance: This report is a snapshot of a resource's achievement and earnings. Achievements are shown against interval to date quota and annual quota. Earnings total are broken down by period to date and interval to date.

- Earnings Statement: This report shows transaction details broken down by period for a resource. It is configurable and you can hide or show selected columns. You can use search parameters to make the report specific to your needs. This report was called the Commission Statement in previous releases.

- Commission Statement: The new Commission Statement Report includes a Balance Summary that shows balances, earnings, recoverable and nonrecoverable amounts, payment due and ending balance. In the Commission Summary section a resource can select details for commission, bonus, or payment adjustments. This section also includes a graph.

To view the reports, perform the following steps.

Login

Log in to Oracle HTML Applications.

Responsibility

Field Sales Manager (Oracle Field Sales)

Field Sales User (Oracle Field Sales)

Sales Force Incentive Compensation User (OIC)

Navigation

Compensation tab

Steps

1. On the Compensation tab:

    a. To view the Commission Statement, click the Commission Statement subtab.

    b. For the other three reports, click the Reports subtab.

2. On the Summary of Compensation Reports page, click a link in the Report Name column to open a report.

1.2.1.5 Top Performers Bin

The Top Performers bin in Oracle Field Sales enables you to monitor the performance of your direct reports and indirect reports in a number of ways. You can:

- View total payments by quarter.

- Show reports for direct and indirect resources in the same organization.

- Show Year to Date as well as quarterly information.

- View payments and earnings in the currency you select.

- View the payments and earnings for the accounting calendar by manager.

The Top Performers bin contains two columns: Period and Payments. You can drill down on the Period link to display a group of four reports. Each report displays revenue and payment amounts and carries the period name at the end of its title:

- Top Paid: Displays information about your directs

- Top Paid Individual Contributors: Displays information for your directs and your indirects (everyone who reports to your directs)

- Top Paid Year To Date: Displays year to date information for your directs

- Top Paid Individual Contributors Year To Date: Displays year to date information for your directs and your indirects (everyone who reports to your directs)

You can drill down on each resource listed in the Name column to view their Year To Date Summary report.

Login

Log in to Oracle Field Sales.

Responsibility

Field Sales Manager

Navigation

Profile icon

Steps

1. Click the Profile icon in the upper right.

A side panel menu opens.

2. Under Sales Online, click the Home Page link.

   The Home Page Preferences page appears.

3. In the Narrow Bin Preferences area, any bins that have already been set up are displayed. If no bins have been set up yet, the columns are contracted.

4. Click **Add New Rows**.

   The Narrow Bin Preferences area expands and fields become available in the Bin Name column.

5. Select a bin number in the Bin Number column.

   This controls the order the bins are displayed on the Home page. This is a required field. If this is the only bin on the Home page, select 1.

6. In the Bin Name column, select Top Performers from the drop-down list.

7. Click **Update**. A confirmation message appears at the top of the page.

8. Click the Home tab.

   The Top Performers bin is displayed in the upper left part of the page.

9. You can edit the parameters of the Top Performers bin. Click **Edit** in the bin itself or during setup steps 7 through 9 above.

   Select appropriate scaling from the drop-down list.

To make sure that current data is displayed in bins on the home page, Oracle Field Sales requires that the bins be refreshed using a concurrent request in Forms. To set up the ability to refresh the Top Performers bin, perform the following procedure:

Login

Log in to Oracle Forms

Responsibility

Oracle Sales Administrator

Steps

1. Select System Administrator responsibility and navigate to Security > Responsibility > Define.

2. Query for Oracle Sales Administrator. (See Guidelines).

3. Note down the request group (Sales and Marketing Super User) that the responsibility belongs to. (See Guidelines)

4. Return to the Navigator window and navigate to Security > Responsibility > Requests.

5. Query for the Sales and Marketing Super User request group.

6. In the Requests area, add the Refresh Top Performers Report request.

7. Save.

8. Switch the responsibility to Oracle Sales Administrator.

9. Run these concurrent requests in order:

   a. Refresh AS_PERIOD_DAYS table: Lists all days of the period.

   b. Refresh Multi-Currency Conversion Rate (AS_PERIOD_RATES): Gets conversion rates from General Ledger tables.

   c. Refresh Top Performers: Applies results of steps a and b to update information in the Top Performers bin.

Guidelines

Setting up the Top Performers Bin needs to done only once.

A request group saves time and effort by grouping individual requests so that an administrator can assign all requests to a responsibility with one entry rather than assigning each request individually.

1.2.1.6 Forecast Hierarchy Drilldown to Year to Date Summary

You can drill down to the Year to Date Summary from the Forecast page in Oracle Field Sales.

You can drill down to the Year to Date Summary from the Forecast page in Oracle Field Sales. Perform the following procedure to do this:

Prerequisites

A hierarchy must be set up in Resource Manager (usage Sales and Telesales). The corresponding compensation plans must be set up, calculation must be run, and the payrun for the resources in this hierarchy must be paid.

Login

Log in to Oracle Field Sales.

Responsibility

Field Sales Manager

Navigation

Forecast tab

Steps

1. In the Subordinate Forecasts area, click the icon in the Compensation column for the corresponding subordinate.

2. Click the hyperlinks to navigate to commission statements.

   If there is no compensation plan or pay group for the period selected, the hyperlinks do not appear.

1.2.2 Oracle Payable

If you want to pay commission to a contract employee who is not part of your standard payroll system, you can set up the employee as a supplier in Oracle Purchasing. This creates an integration with Oracle Payable to pay the resource. For purposes of collecting transactions and paying commissions, Oracle Incentive Compensation treats a supplier contact the same as any other resource.

For the steps to this procedure, see the *Oracle Payables User Guide*. Please also refer to the *Oracle Purchasing User's Guide* for more information.

Full-time, regular employees are paid using Payroll (See Section 1.2.3, "Oracle Payroll").

After a payrun has been processed (Paid status against the Payrun name), the Salespeople Sub-ledgers are updated to reflect the amounts paid in the appropriate accounts and balances, and the data is transferred to the Oracle Payable Invoices Interface table. See Guidelines for details.

To enable integration with Oracle Payable, see Section 2.3.4, "Payment".

Oracle Payable uses the following two interface tables as entry points for data from other applications, including Oracle Incentive Compensation:

- AP_INVOICES_INTERFACE

- AP_INVOICE_LINES_INTERFACE

The following two tables show the columns that map to the columns in each invoice interface table in Oracle Payable:

AP_INVOICES_INTERFACE	Populated with
INVOICE_ID	AP_INVOICES_INTERFACE_S.NEXTVAL
INVOICE_NUM	CN_PAYMENT_ TRANSACTIONS.PAYMENT_ TRANSACTION_ID
INVOICE_DATE	CN_PAYRUNS.PAY_DATE
VENDOR_ID	PO_VENDOR_SITES.VENDOR_ID
VENDOR_SITE_ID	PO_VENDOR_SITES.VENDOR_SITE_ID
INVOICE_AMOUNT	CN_PAYMENT_ TRANSACTIONS.PAYMENT_AMOUNT
INVOICE_CURRENCY_CODE	FUNCTIONAL CURRENCY CODE
PAYMENT_CURRENCY_CODE	REP CURRENCY CODE
SOURCE	"OSC" (NEW quick code of type SOURCE)
ACCTS_PAY_CODE_COMBINATION_ ID	CN_PAYMENT_TRANSACTIONS.LIABILITY_ CCID
INVOICE_TYPE_LOOKUP_CODE	CREDIT (if amount <0); STANDARD (if amount >0)

AP_INVOICE_LINES_INTERFACE	Populated with
INVOICE_ID	Same value as entered for AP_INVOICES_ INTERFACE
INVOICE_LINE_ID	AP_INVOICE_LINES_INTERFACE_S.NEXTVAL
LINE_NUMBER	1
LINE_TYPE_LOOKUP_CODE	ITEM
AMOUNT	CN_PAYMENT_TRANSACTIONS.PAYMENT_ AMOUNT
DIST_CODE_COMBINATION_ID	CN_PAYMENT_TRANSACTIONS.EXPENSE_CCID

1.2.3 Oracle Payroll

You can integrate Oracle Incentive Compensation with Oracle Payroll for employee type resources. When enabled, this integration transfers data from Oracle Incentive Compensation to the Oracle Payroll Batch Element Entry (BEE) interface. Oracle

Incentive Compensation has an API that calls the payroll package to populate data into the BEE interface.

The payroll mapping is stored in these tables:

- CN_QUOTAS_PAY_ELEMENTS_ALL

- CN_PAY_ELEMENT_INPUTS_ALL

Prerequisites

A resource must already be set up in Resource Manager and be assigned to a role with a compensation plan (see Section 2.14, "Define Resources" and Section 2.15, "Assign Resources to Roles and Groups"). Pay elements must be set up in Oracle Payroll.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Navigation

Administration > Parameters

Steps

1. Check the payroll integration flag on the System Parameters page. See Section 2.3.4, "Payment"

2. Map plan elements in Oracle Incentive Compensation to pay elements in Oracle Payroll. See Section 2.20, "Set Up Plan Element to Oracle Payroll Pay Element Mapping".

3. Map Pay Element Input Values. See Section 2.20.1, "Pay Element Input Values Mapping".

1.2.4 Oracle Quoting or Third Party Quoting Application

In this release, there is a new public API which you can use to project commission for salespeople. Projected Compensation provides an estimation of projected variable compensation earnings and their potential impact on quota attainment. Oracle Quoting uses Sales Credit Allocation.

Oracle Incentive Compensation receives data through the API and then sends back projected commissions to the calling application. See the *Oracle Incentive Compensation API Reference Guide*, section 1.7 for details on the API.

The projection calculator cannot be configured with the complexity of an actual compensation plan, so projections are estimates only and are not guaranteed amounts. The more complex the compensation plan, the more inaccurate the projection can be. You can include disclaimer text in the output.

The calling application provides the following values to the Oracle Incentive Compensation API table (CN_PROJ_COMPENSATION_GTT):

- resource_id
- Sales_credit_amount
- calc_date
- currency_code
- projection_identifier

In order for the application to process the projected commission, the following must be verified:

- The resource has a compensation role for the date of the projection.
- The compensation plan is valid for the date of the projection.
- The plan element is Commission incentive type and is valid for the date of the projection.
- The formula package is generated and has a status of VALID.
- The Plan Element Classification ruleset must be valid for the date of the projection.

Oracle Incentive Compensation returns the following information to the calling application:

Plan Element Name (PE_NAME)

Projected Compensation (PROJ_COMP)

Plan Element Quota (PE_QUOTA)

Plan Element Quota Achieved (PE_ACHIEVED)

Plan Element Credit (PE_CREDIT)

Plan Element Interval (PE_INTERVAL)

Setups

These are the setups required to use Projected Compensation with Oracle Quoting or with a third party quoting application. See the separate sections for any steps that are specific to them.

1. Define input and output calculation expressions to be used by the Projected Compensation API. See Section 2.8, "Define Calculation Expressions".

2. Reference the expressions in a formula as forecast input expressions and forecast output expressions. The formula must be of the Commission type. The expressions can reference calculation values from the following tables:

    - CN_QUOTAS

    - CN_SRP_PERIOD_QUOTAS

    - CN_PERIOD_QUOTAS

    - CN_SRP_QUOTA_ASSIGNS

    See Section 2.11, "Define Formulas".

3. Configure the Plan Element Classification Ruleset to include the Projection Identifiers that are sent to the Projected Compensation API. These identifiers, which are set up in Oracle Quoting, identify the appropriate plan element to be used to determine the projected compensation for a given transaction. You must use the Rules Attributes hyperlink for the corresponding rule in the Rules Hierarchy to configure the projection identifiers. See Section 2.24.1, "Build a Rules Hierarchy" for the steps.

Integrating with Oracle Quoting

Out of the box, Oracle Quoting integrates to Oracle Incentive Compensation's projected commission API. After viewing the projected commission amounts, Oracle Quoting users can perform commission what-if analysis by changing quantities and prices of the items, which in turn alters the sales credit amount and recalculates the projected commission. The changes are not saved to the quote itself--they are used only for projecting commission. Projected commission can be displayed at three levels of granularity: the header level, product category level, or individual quote line level.

When integrating with Oracle Quoting, you must set the system profile ASO: Calculate Projected Commission to Yes. This is an Oracle Quoting profile. See the *Oracle Quoting Implementation Guide*, Chapter 8 and Appendix A.

If Sales Credit Allocation is implemented as well, you must refresh sales credit before viewing commissions.

Integrating with a Third Party Quoting Application

Use the same three integration steps as shown previously. Then, write SQL code to:

1. Populate the API table with data

2. Call the Projected Compensation API with the required parameters.

Note: Both of these steps should be performed in the same SQL session.

1.2.5 Oracle Territory Manager

Oracle Incentive Compensation provides the ability to integrate with the Territory Assignment Engine (TAE) during the collection process. The TAE is used to allocate the correct territory resources for transactions, based on the business setup.

The integration between Oracle Incentive Compensation and the Territory Assignment Engine occurs during the Post Collection phase. Post Collection is one of the user code blocks that are provided in Collections to enable users to incorporate extra logic into the collection process.

1.2.5.1 Integrate with the Territory Assignment Engine

To integrate with the Territory Assignment Engine, perform the following steps.

Navigation

Connect to your database.

Steps

1. Modify the code template provided in file cnppcols.pls and cnppcolb.pls.

   This code template contains a package CN_POST_COLLECTION_TAE_PUB with one procedure Get_Assignments. This procedure allows you to add your code to populate the attribute data into the TAE input interface table, make the TAE calls to process the territory assignment, and update the original Oracle Incentive Compensation transactions with the new territory resource information.

2. Compile and apply the revised CN_POST_COLLECTION_TAE_PUB package to the database.

3. In the Post-Collection user code block, make the following call:

```
cn_post_collection_tae_pub.get_assignments
(
p_api_version          => 1.0                        -- IN parameter
p_init_msg_list        => FND_API.G_FALSE,           -- IN parameter
p_commit               => FND_API.G_FALSE,           -- IN parameter
p_validation_level     => FND_API.G_VALID_LEVEL_FULL, -- IN parameter
x_start_period_id      => x_start_period_id          -- IN parameter
x_end_period_id        => x_end_period_id            -- IN parameter
x_conc_program_id      => x_col_audit_id             -- IN parameter
x_return_status        => x_return_status,           -- OUT parameter
x_msg_count            => x_msg_count,               -- OUT parameter
x_msg_data             => x_msg_data                 -- OUT parameter
);
```

4. Save and generate the Collection package.

You should be able to run the Collection process, which integrates with TAE during the post collection process.

1.2.5.2 Modify the Code in the API Template

To add or modify the code in the API Template, use the code template CN_POST_ COLLECTION_TAE_PUB.Get_Assignments to integrate with the Territory Assignment Engine process.

Steps

1. Populate data from Oracle Incentive Compensation transaction interface table (cn_comm_lines_api) into the TAE input interface table (jtf_tae_1001_sc_trans).

Populate SOURCE_ID with -1001, TRANS_OBJECT_TYPE_ID with -1002, TRANS_OBJECT_ID with COMM_LINES_API_ID, and WORKER_ID with 1. For details of the Territory qualifier attribute mapping in jtf_tae_1001_sc_trans, please refer to Oracle Territory Manager documentation.

2. Make the TAE call to process the territory assignment of transactions (see Guidelines).

3. Read the winning territory-resource data from the TAE output table (jtf_tae_ 1001_sc_winners).

4. Update the original transactions with new winning territory resource information.

Guidelines

In this code template, first write the statement(s) or make your custom call(s) to insert transaction data into the TAE input interface table. After that, perform the following two procedure calls, which are already in the code template:

- JTF_TAE_ASSIGN_PUB.Get_Winners_Parallel: This is the TAE call to trigger the territory assignment engine. It corresponds to step 2 above and should be called after you populate the data in the TAE input interface table. The results of the territory assignments are stored in the TAE output table.

- CN_PROCESS_TAE_TRX_PUB.Process_Trx_Records: This call reads the territory resource from the TAE output table and populates the allocated resource information back to the Oracle Incentive Compensation transaction interface table. The original transaction in the Oracle Incentive Compensation transaction interface table is obsoleted and a corresponding new one with a new allocated resource is created.

1.2.5.3 Column Mapping of Account Qualifiers to JTF_TAE_1001_SC_TRANS

Sales Credit Allocation uses Account transaction objects from Oracle Territory Manager to match a territory to a transaction. It does not use Leads or Opportunities transaction objects for this purpose. The following section shows the data mapping between the Account transaction object qualifier attributes and the corresponding value columns in the JTF_TAE_1001_SC_TRANS table.

The account qualifiers are categorized into four types.

- Type 1: No Oracle dependencies; can be used for any mapping. Type 1 qualifiers can be repurposed because there are no dependencies other than aligning your API call to the territory setups.

- Type 2: Oracle Trading Community Architecture (TCA) dependencies. This means that you must store your customer data in TCA.

- Type 3: Oracle Accounts Receivable (AR) dependencies, specifically for seeded values in the HZ_LOCATIONS table. This means that you must seed these lists of values to use them.

- Type 4: Oracle Field Sales dependencies, specifically for seeded interest codes in the AS_INTERESTS table. You must seed these lists of values to use them.

Use the following questions to determine which qualifiers you should use for column mapping for territories.

1. Is this a stand alone implementation of Oracle Incentive Compensation?

a. If the answer is No, is your customer data stored in TCA?

   – If Yes, you can use qualifiers of type 1 and type 2.

   – If No, you can use qualifiers of type 1.

b. If the answer is Yes, and you want to create territories that use a qualifier of type 2, you must place your customer data into TCA.

c. If the answer is Yes, you can use one of the qualifiers of type 1 for any purpose without dependencies.

2. Are you creating territories that use a qualifier of type 3 or type 4?

a. If the answer is Yes, you must seed values appropriately.

b. If the answer is No, then ignore this question.

In the table below, column 1 indicates the JTF_TAE_1001_SC_TRANS column name. Column 2 contains the name of the account qualifier. Column 3 displays the Type of dependencies, as described earlier. Column 4 contains comments regarding the territory qualifier mapping.

Table 1–1 Account Qualifier Mapping

JTF_TAE_1001_SC_TRANS Column	Account Qualifier	Type	Comments
SOURCE_ID	-	N/A	Must be -1001
TRANS_OBJECT_TYPE_ID	-	N/A	Must be -1002
TRANS_OBJECT_ID	-	1	Map to unique OIC transaction identifier
TRANS_DETAIL_OBJECT_ID	-	2	Only if your customer record is stored in Oracle's Trading Community Architecture, this is a unique identifier to the party site ID on a transaction. Otherwise, set it to NULL
-	Account Classification	4	This qualifier derives its values from a set of lookups and requires account classifications to be set up in Oracle Field Sales.
SQUAL_NUM02	Account Code	2	Only if your customer data is stored in Oracle's Trading Community Architecture (TCA), maps to TCA's PARTY_SITE_ID
SQUAL_NUM04	Account Hierarchy	2	Maps only to parties rolling up to a specific PARTY_ID within Oracle's Trading Community Architecture

Table 1–1   Account Qualifier Mapping

JTF_TAE_1001_SC_ TRANS Column	Account Qualifier	Type	Comments
SQUAL_CHAR08	Area Code	1	Area Code
SQUAL_CHAR09	Category Code	2	Maps only to TCA's CATEGORY_CODE
SQUAL_CHAR02	City	3	Maps only to Cities set up in Oracle AR (Need to seed HZ_Locations table to use)
SQUAL_CURC01	Company Annual Revenue (Currency Code)	1	Currency of Company Annual Revenue, for example, EUROS (Both SQUAL_CURC01 and SQUAL_NUM06 need to be populated)
SQUAL_NUM06	Company Annual Revenue	1	Company Annual Revenue, for example, 100,000,000 (Both SQUAL_CURC01 and SQUAL_NUM06 need to be populated to work together)
SQUAL_CHAR07	Country	3	Maps only to Countries set up in Oracle AR (Need to seed HZ_Locations table to use)
SQUAL_CHAR03	County	3	Maps only to Counties set up in Oracle AR (Need to seed HZ_Locations table to use)
SQUAL_NUM01	Customer Name	2	Maps only to Party IDs set up in TCA, identifying a unique customer
SQUAL_FC01	Customer Name Range (First Character: for LIKE processing)	1	First character of Customer Name Range (Both SQUAL_FC01 and SQUAL_CHAR01 need to be populated to work together)
SQUAL_CHAR01	Customer Name Range	1	Customer Name Range (Both SQUAL_FC01 and SQUAL_CHAR01 need to be populated to work together)
SQUAL_NUM10	DUNS Number	2	Maps only to DUNS Number of parties set up in TCA
SQUAL_NUM05	Number of Employees	1	Number of Employees
SQUAL_CHAR06	Postal Code	1	Postal Code
SQUAL_CHAR05	Province	3	Maps only to Province set up in Oracle AR (Need to seed HZ_Locations table to use)

Table 1–1   Account Qualifier Mapping

JTF_TAE_1001_SC_ TRANS Column	Account Qualifier	Type	Comments
SQUAL_NUM03	Sales Partner Of	2	Maps only to parties that are partners of a specific PARTY_ID in TCA
SQUAL_CHAR10	SIC Code	2	Maps only to SIC Codes set up in TCA
SQUAL_CHAR04	State	3	Maps only to States set up in Oracle AR (Need to seed HZ_Locations table to use)
WORKER_ID	N/A	N/A	Must be set to 1

These are the steps for integrating with the Territory Assignment Engine (TAE).

Steps

1. Create a territory.

    See the *Oracle Territory Manager User Guide*.

2. Modify the code in Oracle Incentive Compensation (CN_POST_COLLECTION_ TAE_PUB)

    a. Go to section or comment, which says == > " OIC CODE TO INSERT DATA INTO JTF_TAE_1001_SC_TRANS GOES HERE"

    b. Enter the following SQL script.

    ```
    Insert into JTF_TAE_1001_SC_TRANS (
            source_id,
            trans_object_type_id,
            trans_object_id,
            squal_char02,
            squal_num01,
            squal_char04)
     select(
            -1001,
            -1002,
            trans_object_id,
            ATTRIBUTE15,
            customer_id,
            ATTRIBUTE14)
     from cn_comm_lines_API
     where process_batch_id in
            (select process_audit_id)
    ```

```
                    from cn_process_audits
                    where parent_process_audit_id = x_conc_program_id

        Note ATTRIBUTE15 ==> Mapped to city Indirect mapping
                  customer_id,
                  ATTRIBUTE14 ==> Mapped to state Indirect mapping.
```

3. Call CN_POST_COLLECTION_TAE_PUB.get.assignments as a post collection action for transaction source order booking/Receivable posting.

   a. Log in to Oracle HTML Applications with an Oracle Incentive Compensation responsibility.

   b. Click Administration > Incentive > Collection > Action.

   c. Select Order Booking.

   d. Select Post-Collection in the user code section.

   e. Enter the following code (see Section 1.2.5.1, "Integrate with the Territory Assignment Engine", step 3, for complete code).

   ```
   cn_post_collection_tae_pub.get_assignments
   ```

   f. Click **Update**.

Guidelines

All character fields which are passed into JTF_TAE_1001_SC_TRANS must be passed as in UPPERCASE. The Qualifier Values stored in the materialized views used in Territories are all UPPERCASE, so for matching to work the passed in values must also be in UPPERCASE.

The Trans_object_id can be a unique identifier. So, you can pass in comm_lines_api_id.

You can use a Where clause, for example, on load_status, if you do not want to insert every record from comm_lines_api.

1.2.6 Oracle Sales

If you are implementing Oracle Sales and want to provide resources with access to their commission statements, you can create a link to the Commission Statement report on the Sales Dashboard.

Login
Oracle Forms Applications

Responsibility
System Administrator

Navigation
Application > Function

Steps

1. Copy the existing CN_COMM_STMT_REPORT2 function to a new function called CN_COMM_STMT_REPORT3.

2. Change the type from SSWA jsp function to JSP Interoperable with OA.

3. Leave the HTML call the same: OA.jsp.

4. Log in to the ASN Self Service application.

5. Navigate to Sales User > Sales Dashboard.

6. Click **Personalize Page**.

7. Select a scope of **Shared Region: Shortcuts**.

8. Click the **Create Item** icon on Bulleted List.

9. Select **Static Styled Text** in the Item Style dropdown list.

10. Enter the following and click **Apply**:

    - ID: Compensation Link

    - Destination Function: CN_COMM_STMT_REPORT3

    - Prompt: Commission Statement Report

11. Return to the Sales Dashboard and verify that the shortcut link is present and works correctly.

2

Implementing Oracle Incentive Compensation

Perform the following tasks to implement Oracle Incentive Compensation:

- Section 2.1, "Implementation Overview"
- Section 2.2, "General Ledger Setups"
- Section 2.3, "System Parameters"
- Section 2.4, "Open and Close GL Periods"
- Section 2.5, "Open Accumulation Periods"
- Section 2.6, "Define Tables"
- Section 2.7, "Define External Table Mapping"
- Section 2.8, "Define Calculation Expressions"
- Section 2.9, "Define Rate Dimensions"
- Section 2.10, "Define Rate Tables"
- Section 2.11, "Define Formulas"
- Section 2.12, "Define Resource Groups (Compensation Groups)"
- Section 2.13, "Define Roles"
- Section 2.14, "Define Resources"
- Section 2.15, "Assign Resources to Roles and Groups"
- Section 2.16, "Activate Pay Periods"
- Section 2.17, "Define Pay Groups"

2.1 Implementation Overview

Oracle strongly recommends that you implement Oracle Incentive Compensation in the order listed.

Section 2.1.1, "Process Description"

Section 2.1.2, "Implementation Task Sequence"

2.1.1 Process Description

The steps needed for implementing Oracle Incentive Compensation are listed in the recommended order in which they should be carried out. When the step includes steps performed in another application, the relevant implementation guide is referenced.

2.1.2 Implementation Task Sequence

Table 2-1 below summarizes the necessary steps to successfully implement Oracle Incentive Compensation. Further information detailing the implementation procedures is provided in the sections following the table.

To implement Incentive Planning, see Chapter 3.

To implement Sales Credit Allocation, see Chapter 4.

Prerequisites

Completion of installation and implementation steps as outlined in the following documents:

- *Oracle System Administrator's Guide*
- *Supplemental CRM Installation Steps Release 11i*

Table 2–1   Standard Oracle Incentive Compensation Process

Step		Description	Forms or HTML	Responsibility
1.	General Ledger Setups	Define period types, calendar, periods, currency, and set of books.	Forms	General Ledger Super User
2.	System Parameters	Pick a set of books, and set up parameters for collection, calculation, payment, Income Planner disclaimer.	HTML	IC Super User, IC Analyst, IC Analyst
3.	Open and Close GL Periods	Create Period Type, Create Accounting Calendar, and Activate Pay Periods.	HTML	IC Super User, IC Analyst, IP Analyst
4.	Open Accumulation Periods	Set the status of the accumulation periods.	HTML	IC Super User, IC Analyst, IP Analyst
5.	Define Tables	Optional. Define tables and columns used in collecting transactions into the application.	HTML	IC Super User, IC Analyst, IP Analyst
6.	Define External Table Mapping	Optional. Join external tables to destination tables in the application.	HTML	IC Super User, IC Analyst, IP Analyst
7.	Define Calculation Expressions	Define input expressions, output expressions, and performance measures, and create bonus calculation expressions.	HTML	IC Super User, IC Analyst, IP Analyst
8.	Define Rate Dimensions	Define the tiers that are used in a rate table.	HTML	IC Super User, IC Analyst, IP Analyst

Table 2–1   Standard Oracle Incentive Compensation Process

Step		Description	Forms or HTML	Responsibility
9.	Define Rate Tables	Set up compensation percentage rates or fixed amounts for different performance levels.	HTML	IC Super User, IC Analyst, IP Analyst
10.	Define Formulas	Set up how compensation is calculated in a plan element.	HTML	IC Super User, IC Analyst, IP Analyst
11.	Define Resource Groups	Performed in Resource Manager. Refer to: Appropriate sections of *Common Application Components Implementation Guide* or *Common Application Components User Guide* (Resource Manager)	Forms HTML	CRM Administrator Resource Self Service Administrator
12.	Define Roles	Define the details of sales roles, which describe a set of resources that share a common compensation structure.	Forms HTML	CRM Administrator Resource Self Service Administrator
13.	Define Resources	Performed in Resource Manager. Also set up teams. Refer to: Appropriate sections of *Common Application Components Implementation Guide* or *Common Application Components User Guide* (Resource Manager)	Forms HTML	CRM Administrator Resource Self Service Administrator
14.	Assign Resources to Roles and Groups	Refer to: Appropriate sections of *Common Application Components Implementation Guide* or *Common Application Components User Guide* (Resource Manager)	Forms HTML	CRM Administrator Resource Self Service Administrator
15.	Activate Pay Periods	Activate a pay period before paying a payrun.	HTML	IC Super User, IC Analyst, IP Analyst
16.	Define Pay Groups	Defines frequency of payments for resources assigned to a pay group.	HTML	IC Super User, IC Analyst, IP Analyst
17.	Set up Collections	Optional. Set up transaction sources, source tables, queries, collection mapping, direct and indirect mappings, and add user code blocks and filters. Generate and run collections.	HTML	IC Super User, IC Analyst, IP Analyst
18.	Set up Expense and Liability Account Mapping	Optional. Used to set up outside suppliers and vendors to use Oracle Payable.	HTML	IC Super User, IC Analyst, IP Analyst

Table 2–1   Standard Oracle Incentive Compensation Process

Step		Description	Forms or HTML	Responsibility
19.	Set up Plan Element to Oracle Payroll Pay Element Mapping	Optional. Integrates Oracle Incentive Compensation with Oracle Payroll.	HTML	IC Super User, IC Analyst, IP Analyst
20.	Map Classification Attributes and Collection Attributes	Define descriptive flexfields in the CN_ COMMISSION_HEADERS table.	HTML	IC Super User, IC Analyst, IP Analyst
21.	Define Revenue Classes	Set up user-defined categories to determine sales credit.	HTML	IC Super User, IC Analyst, IP Analyst
22.	Define Revenue Class Hierarchy	Set up or modify the relationship between revenue classes.	HTML	IC Super User, IC Analyst, IP Analyst
23.	Define Classification Rulesets for Revenue Classification	Set up rules hierarchy for classifying sales transactions as they enter the application.	HTML	IC Super User, IC Analyst, IP Analyst
24.	Define Interval Types	Optional. Set up specific periods during which sales accumulate to determine commission rates.	HTML	IC Super User, IC Analyst, IP Analyst
25.	Define Credit Types	Optional. Define monetary and nonmonetary credit types used in the application.	HTML	IC Super User, IC Analyst, IP Analyst
26.	Define Plan Elements	Build plan elements from formulas, rate tables, revenue classes, and transaction factors.	HTML	IC Super User, IC Analyst, IP Analyst
27.	Define Compensation Plans	Build compensation plans from plan elements. Make changes to existing compensation plans.	HTML	IC Super User, IC Analyst, IP Analyst
28.	Define Payment Plans	Optional. Create optional plans to set up advance or deferred payments.	HTML	IC Super User, IC Analyst, IP Analyst
29.	Assign Payment Plans	Optional. Assign payment plans created in step 46 to resources or roles.	HTML	IC Super User, IC Analyst, IP Analyst, IP Contract Approver, IP Finance Manager, IP Sales Manager

Table 2–1   Standard Oracle Incentive Compensation Process

Step	Description	Forms or HTML	Responsibility
30. Assign Pay Groups	Resources must be assigned a pay group to receive compensation. You also can assign a pay group to a role.	HTML	IC Super User, IC Analyst, IP Analyst, IP Contract Approver, IP Finance Manager, IP Sales Manager
31. Customize Quota and Rates for Resources	Optional. Make changes to plan elements of a compensation plan for a specific resource.	HTML	IC Super User, IC Analyst, IP Analyst, IP Contract Approver, IP Finance Manager, IP Sales Manager
32. Verify the Implementation	Confirm the minimum setups required to activate the application and allow users to begin entering setups and data. Verify profiles, system parameters, period types, accumulation periods, and so on.	Forms HTML	System Administrator IC SuperUser

2.2 General Ledger Setups

To use Oracle Incentive Compensation, at the beginning of the implementation you must define in General Ledger the period types, calendar, periods, currency, and set of books on which you want to base your compensation periods. After you have defined these in Oracle General Ledger, you need to identify this information in Oracle Incentive Compensation on the System Parameters page (Administration > Incentive > Parameter).

For the specific General Ledger setups, please refer to *Oracle General Ledger User's Guide*, Setup.

Perform the General Ledger setup in Oracle Forms. You can also use the HTML version of the application to define period types and the accounting calendar by clicking Administration > General and selecting from the side panel menu.

Responsibility

General Ledger Super User

2.2.1 Define Period Types

Oracle Incentive Compensation requires the period types to be defined in General Ledger so that compensation can be calculated. Examples of period types are:

- Period (month)

- Quarter

- Year

Custom period types can be defined.

A period type determines how you divide your calendar or fiscal year. The Calendar Type page enables you to create period types for either a calendar or a fiscal year. On the page you can also indicate the number of periods per year and enter a description. After you have defined the period type, you must create an accounting calendar. If the period type you need is already defined, proceed to section 2.2.2.

Navigation

Administration > General > Calendar Type

Steps

1. Enter the information.

2. Click **Update**.

2.2.2 Define Accounting Calendar

The accounting calendar contains the exact date ranges for all the periods in a specific calendar or fiscal year.

You can define different calendars for different business activities. Examples of these calendars include Fiscal, Standard 12-month, or variations such as a Fiscal 13-month calendar with 12 months and an adjustment period.

Navigation

Administration > General > Accounting Calendar

Steps

1. Enter the information.

2. For prefixes, for a month, you can use the abbreviation, such as Jan for January. For a year, it can be FY-02 or something similar.

3. Number indicates the sequence of the period. For monthly periods, for example, enter 4 for April, 8 for August, and so on.

4. The Name field is required, but it is automatically populated by the application.

   By default, the application builds the contents of the Subject field by combining the data in the Prefix column with the year suffix and hyphenating them. You can customize the field by entering a new name.

5. Click **Update**.

2.2.3 Define Periods

After you have defined your calendar, you need to add periods to it in General Ledger. If no periods are defined in General Ledger, Oracle Incentive Compensation cannot collect transactions or make payruns.

2.2.4 Define Currency

Any currency that Oracle Incentive Compensation needs to calculate compensation must be defined in General Ledger. For example, if your company trades in North America, you want to define US dollars, Canadian dollars, and Mexican pesos. You can also define multiple forms of the same currency, such as US dollar (next day) and US dollar (same day).

2.2.5 Define Set of Books

The Set of Books provides a means to collect and quantify financial data. Oracle Incentive Compensation requires that a set of books be set up in General Ledger. The set of books includes a chart of accounts, calendar, and currency.

A chart of accounts is the account structure that you define to fit the specific needs of your organization. An accounting calendar defines the accounting year and the periods it contains.You select the functional currency for your set of books as well as other currencies that you can use to transact business and can use in reports.

One set of books can be used for your entire company or different sets of books can be set up for different divisions or locations.

2.3 System Parameters

Identify the information you set in General Ledger on the System Parameters page.

Login

Log in to Oracle HTML Applications

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Parameter

2.3.1 General Ledger

The application processes incentive compensation payments according to periods defined in a calendar associated with a set of books you define in Oracle General Ledger (see *Oracle General Ledger User's Guide*, Setup).

This information is displayed for the General Ledger set of books:

- Currency associated with this set of books

- Calendar associated with this set of GL books (view only, cannot be edited)

- Period type associated with this set of GL books (view only)

2.3.2 Collection

These selections affect how transactions are collected. The batch size affects the amount of time the application requires to process the total transactions. Clawback grace days determines the number of days allowed after the payment due date before sales credit is taken back from resources.

2.3.3 Calculation

Four of the fields in this section may affect calculation performance: Transaction Batch Size, Latest Processed Date, Salesperson Batch Size, and Managerial Rollup.

Rule Batch Size does not affect calculation in any way. This option is used when creating the Classification Rules Package.

The Transaction Batch Size and Salesperson Batch Size together determine how many transaction batch runners get submitted for calculation. During the transaction batch pre-processing phase, Oracle Incentive Compensation determines how many batches will be run for this calculation process. For example, if you want to calculate 10,000 transactions and the batch size is 1,000, ten batches will be created.

The resources are first assigned to physical batches (identified by PHYSICAL_ BATCH_ID) based on the transaction batch size and salespeople batch size as defined on the System Parameters page. A physical batch contains at most the number of resources specified by the salespeople batch size parameter and at most the number of transactions specified by the transaction batch size parameter. When a physical batch is filled up, Oracle Incentive Compensation creates another physical batch to continue the assignment process until all resources and their transactions are assigned to a physical batch.

Calculation assigns each resource to a single physical_batch_id. It does not split the resource across two batches.

To improve the performance of concurrent calculation, and thereby save time, Oracle Incentive Compensation reuses existing resource groupings to create batch runners. Sometimes, over time or due to certain circumstances, the existing groupings create a skewed distribution of transactions and need to be regrouped. A simple setting of the Transaction Batch Size parameter controls this. To reuse existing groupings, enter a transaction batch size ending in a zero (0), for example, 2,500. To make the application regroup resources and transactions into new batch runners, enter a transaction batch size ending in a number other than zero, for example, 2,501. After you are satisfied with the new grouping and want to reuse it, reset the transaction batch size parameter to a number ending in zero.

Note: A good starting point for setting the values for salesperson batch size is a rough equivalent to the maximum number of concurrent manager slots and the number of server processors available. You can then fine tune the numbers to get the best setting for your setup.

The view-only Latest Processed Date field indicates the date of the latest transaction for which calculation has been run. If the system profile OSC: Prior Adjustment is set to No or N, it allows all plan elements in a period to be calculated incrementally. Before enabling the profile option, be sure that any transactions that have a processed date earlier than the latest processed date showing in the System Parameter window have been calculated.

Note: After you change the setting of a profile option, you must bounce the server to reset it.

Check the Managerial Rollup box if you want sales credits to roll up through the compensation group hierarchies. If the box is checked, Oracle Incentive Compensation awards indirect credit for each transaction whose direct credit receiver is in the compensation group hierarchy. This parameter affects all transactions. You can use pre_processed_code to control indirect credit on a transaction-by-transaction basis.

2.3.4 Payment

Use this section to integrate Oracle Incentive Compensation with Oracle Payable or Oracle Payroll. You can also indicate where you want to populate account codes for expense and liability information.

Navigation

Administration > Incentive > Parameter

Account Generation is an option you can use to populate account codes at the appropriate detail level and then select from where the application pulls expense and liability information.   **Note:** If the account level population is set to Classification or Revenue Class, the system profile Pay by Transaction must be set to Yes or Y for the account to be populated to the Accounts Payable interface.

There are four levels of detail where population can occur:

- Classification - The application takes expense and liability accounts that are provided on the Ruleset Details page and passes that information to Accounts Payable.

- Plan Element - The application takes expense and liability accounts that are provided on the Plan Element page and passes that information to Accounts Payable.

- Revenue Class - The application takes expense and liability accounts that are provided on the Revenue Class Summary page and passes that information to Accounts Payable.

- Custom - The Custom option provides flexibility for companies that want to pass along expense and liability data which are independent of the normal Oracle Incentive Compensation classification process. Mapping to this data is required.

Oracle Incentive Compensation pulls expense and liability information from the Plan Element tables to populate expense and liability account codes in Oracle Payable for manual transactions or payments related to payment plans which have an account generation type of Classification or Revenue Class and are in pay by transaction mode.

Account Generation is set at the application level. Once it is set, the application obtains all of the information from only that level. This means that regardless of where you populate data, if it doesn't match the system option, it cannot be used. For example, if you set the system parameter to Plan Element and begin populating expense and liability account information at the Revenue Class level, the application ignores whatever you enter at the Revenue Class level.

If you select the Classification level from the Account Generation drop-down list, you must create a ruleset type of Account Generation to define conditions and their corresponding accounts. See Section 2.19.1, "Account Generator" for the procedure.

In order for the system to know to transfer the account code, you must first be able to classify the transactions. To classify the transaction, see Section 2.24, "Define Classification Rulesets". Create the same rule as you created in the Ruleset for Account Generation. Then, you can calculate and pay for transactions.

Guidelines

The application checks to see what account generator level has been set. Based on this level, the appropriate Accounts Payable accounts are associated to the line item. The three levels are as follows:

- Revenue Class: Each revenue class is assigned a specific liability and expense account. This option should be used if tracking expenses for each product is required.

- Plan Element: Each plan element is assigned a specific liability and expense account. This option should be used if all products assigned to the plan element will be assigned to the same expense and liability account.

- Classification: An entire rule is assigned a specific liability and expense account.

2.3.5 Income Planner Disclaimer

An organization can add a disclaimer to what resources see when they use Income Planner in Oracle Field Sales. A typical disclaimer warns the user that amounts generated using Income Planner may not match the exact amount of commission paid. Disclaimer text is limited to 2,000 characters.

This text can also be included in the Projected Compensation output record.

2.4 Open and Close GL Periods

To administer Oracle Incentive Compensation periods, set up your periods to the future enterable state. It can be Never Opened at the beginning. When you are ready to calculate the compensation payments, open the appropriate accounting period. You may close an accounting period after you have calculated and paid the compensation, or you may leave multiple periods open if you expect to make adjustments for prior periods.

You must have an active pay period in order to use Oracle Incentive Compensation to pay commission to resources. If a pay period has any transactions associated with it, you can not deactivate it.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Pay Periods

Steps

1. To activate pay periods, select **Active** next to the period you want to activate.

2. Click **Update**.

2.5 Open Accumulation Periods

Accumulation periods are used to define the time period during which commissions are collected. You must open an accumulation period in order to use it to calculate commission. After commissions are calculated, you can close or permanently close the accumulation period, after which you cannot calculate commission for that period. You can set up a Future Entry status for an accumulation period before it is used. An accumulation period with a status of

Never Opened has not yet been used, and must be opened before commission can be calculated for it.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Accumulation Period

Steps

1. Select a year and click **Apply**.

2. For each period, choose a period status:

3. Check the Freeze box if you want to prevent the data from being changed, for example, when you want to run reports in Oracle Field Sales.

4. Click **Update**.

Guidelines

You can change a Never Opened period to Future - Entry and then to Open. You can close an Open period and open a Closed period. After you open a period, the choices in the drop-down list become Permanently Closed, Open, and Closed.

After you permanently close a period, you cannot reopen it, and no transactions of any kind can be processed. Be sure that there are no new transactions, adjustments, takebacks, payments, or any other outstanding transactions before you permanently close a period.

You cannot close a period if there is a period before it that is open. For example, you cannot close the June 2004 period if the March 2004 period remains open. If you attempt to close a period that has an open period before it, a message displays at the top of the page:

> Cannot close a period when previous period is not closed.

If this occurs, click the Back button on your browser and close any previous periods with an Open status.

You cannot open a period if the previous period is in Never Opened status.

When you are updating or changing accumulation periods to Open, update only one date range at a time. Wait until the status changes from *In Progress* to *Open* before changing the next date range.

2.6 Define Tables

Use the Tables page to specify tables from Accounts Receivable, Order Management, or an external source that are used in collecting and calculating transactions in Oracle Incentive Compensation. Tables must be defined before they can be used in collection or calculation. See Section 2.21, "Map Classification Attributes and Collection Attributes".

Oracle Incentive Compensation uses the CN_COMMISSION_HEADERS table to collect transaction data for processing commissions for resources. You can set up attribute columns in the table to support your business requirements. See Section 2.6.1, "Define Columns" for details.

Prerequisites

Tables must exist in the database.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Tables

Steps

1. Query a table.

Enter a user name and specify whether the table and its columns are used in collection or calculation.

2. Click **Update**.

3. Click **Columns** in the details column to go to the Columns page.

2.6.1 Define Columns

After you have defined tables for collection or calculation, use the Columns page to define specific columns and relate them to columns in other tables. The column name is set in the application, but you can assign a user name to it to match your business process or for ease of use. The external call column is currently not used.

There are four views of the Columns page:

- The Columns view displays information and is where you can select which columns to use.

- The Dimensions view is used to specify a hierarchy as the source of the values for the column.

- The Classification view enables classification as alphanumeric, date, or numeric, and provides a place to select a previously defined value set name.

- The Primary Key view is not used in the current release.

Login

Log in to HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Tables > Columns

Steps

1. For the Columns view, perform the following steps:

a. You can change the name in the User Name field. If used in Calculation, you can see it on the Create Expressions page. If used for Collection, you can see the name on the Collection related pages.

b. The Data Type field indicates if the column contains alphanumeric material (VARCHAR2), numerical data (NUMBER), or a date (DATE).

c. The Data Length column indicates the length of the data, which is already defined in the database.

d. Check the Usage box to identify whether this column is available to build expressions for formulas.

e. Click **Update**.

2. For the Dimensions view, perform the following steps:

a. You can change the name in the User Name field.

b. The dimension name identifies the dimension (of hierarchies) associated with this column.

c. The Value box indicates whether the User Name column is being used.

d. Click **Update**.

3. For the Classification view, perform the following steps:

a. You can change the name in the User Name field.

b. Check the Value box next to a column to indicate that the column can be used in the classification process.

c. The Value Set Name is used to set a value when this column is defined as a rule attribute.

d. Click **Update**.

4. The Primary key view is not in use.

2.7 Define External Table Mapping

If the information you need is in tables that are not in Oracle Incentive Compensation, you can join those tables to destination tables in Oracle Incentive Compensation.

Prerequisites

Tables must already exist, and must be in the same instance as Oracle Incentive Compensation.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > External Table

Steps

1. Enter the required information.

2. Click **Update**.

    The table name alias is system generated and the Columns link appears in the External Columns column. It is used by the system to generate SQL code.

3. Click **Update**.

4. Click **Columns** to open a page where you can join a source table with an external table.

2.8 Define Calculation Expressions

Calculation expressions are interchangeable, reusable parts that are used in input and output expressions of formulas, expression-based rate dimensions, performance measures, forecast expressions, and for projected compensation.

You can use these calculation expressions as performance measures, input expressions, output expressions, or rate table dimensions. You can also embed one calculation expression within another. After they have been saved, the expressions can be assigned and reassigned to any number of formulas you need.

Any column from any table can be part of your expression, as long as the Calculation Value box for the column is selected in Columns and Tables.

You can place a formula inside a calculation expression if you want to be certain that the formula output result is used in the expression. Sequencing plan elements in a compensation plan can also assure that calculations are performed in the order you need.

You can add functions to an expression by selecting them from the Functions list of values. This feature is used in the procedure below. See Guidelines for an example of a user defined function.

2.8.1 Input Expressions

Input expressions tell Oracle Incentive Compensation what to evaluate from the transactions and how to match the results to the corresponding rate table. A simple input formula expression looks like this:

TRANSACTION_AMOUNT

For example, a company can establish that its sales force will be compensated based on transaction amount. The input expression evaluates transactions from the TRANSACTION_AMOUNT column of the CN_COMMISSION_HEADERS table.

This is an example of a rate table:

Transaction Amount	Commission
$0 - $100	4%
$100 - $500	5%
$500 - $99,999	6%

As transactions are sorted by through the input expression they are matched to the established rate table tiers. If a transaction is collected in Oracle Incentive Compensation with the following attributes:

1. Customer X

2. Transaction Amount $100

3. Product Z

Oracle Incentive Compensation, using the TRANSACTION_AMOUNT input expression, matches the above transaction of $100 with the rate table and determines that 5% will be paid on this order.

2.8.2 Output Expressions

Output expressions instruct the application how much to pay resources. The payment amount can either be tied to a rate table or not. This will be determined by the users.

Example of a typical output expression, which uses a rate table:

Rate Table Result * TRANSACTION_AMOUNT

2.8.3 Performance Measures

A performance measure is part of a plan element that captures an accumulation of transaction values by plan element and uses the data in reports that compare achievements to quota, goal and performance measure. Performance measures are not used to calculate commission.

You can use a performance measure to track revenue. You select and define the columns where revenue information for transactions is held. Then, as transactions are entered and collected for the assigned plan element, the transaction values are accumulated. An example performance measure is:

TRANSACTION_AMOUNT

Note: Performance measures must use numeric expressions to work correctly. In a formula, if no performance measure is assigned, the application uses the first input expression. If that expression evaluates to string values, the calculation will fail. Therefore, it is important to assign a numeric performance measure when the first input expression is not numeric.

2.8.4 Defining Calculation Expressions

Use the following procedure to define calculation expressions.

Prerequisites
Table and column mapping is complete.

Login
Log in to Oracle HTML Applications.

Responsibility
Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Expression > Create

Steps

1. After naming the expression, select elements on the left side of the expression builder and move them into the Expression box on the right.

2. You can use operands, user created functions, and numeric constants or string values when building an expression.

3. You can use values from another plan element and plan element metrics. See Guidelines.

   See the *Oracle Incentive Compensation User Guide,* Chapter 6, for more information on interdependent plan elements.

4. Click **Update**.

   The status of the expression reads Valid if it has compiled properly. If an expression is not valid, it cannot be used. Check the error message and fix the problem before attempting to validate the expression again.

5. The usage of the expression is also displayed once it is saved. The usage rules determine where the expression may be applied. See Guidelines.

Guidelines

The six selections in the View drop-down list represent groups of calculation elements. Only the calculation elements for that selection are displayed in the Calculation Values box.

- Sales Compensation Elements: These include seeded and previously defined columns from the transaction headers and lines tables, as well as compensation plan related tables.

- Expressions: Any previously defined expression can be used as part of another expression.

- Formulas: Any previously defined non-cumulative commission formula can be used as part of an expression.

- External Elements: For non-seeded tables or views to be available for expression building, they must be registered on the Tables page and mapping between them and seeded OIC tables should be defined on the External Table page (Administration > External Tables).

- SQL Functions: SQL Number, Group, and other functions can be added to an expression.

- Others: Other elements, such as Rate Table Result and Forecast Amount, are listed here.

Selected columns are accessible for use in building formulas and performance measures.

The following Oracle Incentive Compensation tables are predefined in the system and can be used as calculation values in defining performance measures and formulas:

- CN_COMMISSION_HEADERS: Contains information relating to the transaction, such as employee name and number.

- CN_COMMISSION_LINES: Stores transactions created as part of calculation

- CN_SRP_QUOTA_ASSIGNS: Stores resource plan element assignments

- CN_SRP_PERIOD_QUOTAS: A multi-org view of quotas and achievements based on interval to date and period to date

- CN_QUOTAS: Stores plan elements

A rate dimension calculation expression can only be defined from the following tables:

- CN_SRP_PERIOD_QUOTAS: see above

- CN_SRP_PLAN_ASSIGNS: Stores resource plan assignments

- CN_SRP_QUOTA_ASSIGNS: see above

- CN_SALESREPS: Stores resource personal data, such as name, salesrep-id, and email address.

An output expression cannot contain both ITD_TARGET and ITD_PAYMENT. ITD_TARGET is typically used in input expressions to determine achievement levels by looking up the commission rate. ITD_PAYMENT is normally used in output expressions to payment. If both are used together in an output expression, it causes conflict.

This is an example of a user defined function. Create a user defined function in SQL Plus in the APPS schema, and make sure it is valid. Then you can select it from the List of Values in the expression builder in the application. It is difficult to create a thresholding/cap function using the simple SQL elements supplied in Oracle Incentive Compensation. However, you can create a function in which if a given value is less than the threshold, the function returns to 0; if it is greater than the cap, the function returns the cap value; otherwise it returns the value itself.

In SQL Plus, the function is:

```
create or replace function
  threshold_cap (value number, threshold number, cap number)
return number IS
begin
  if value < threshold then
    return 0;
  elsif value > cap then
    return cap;
  else
    return value;
  end if;
end;
```

You can now build an expression that uses this function in the expression builder in Oracle Incentive Compensation:

threshold_cap(Commission Headers.Transaction Amount,1000,5000).

Warning: When creating user defined expressions, do not perform any updates of transaction related tables or perform any commits. This will potentially cause data corruption in the transaction tables. However, you are allowed to select any values from any table without causing data corruption.

Depending on how an expression is defined, the usage is one of the following:

- As the input, output, or performance measure of a commission type formula which is applied to individual transactions

- As the input or output of a commission type formula which is applied to individual transactions

- As the output or performance measure of a formula of any type

- As the input of a bonus type formulas or a commission formula which is applied to a group of transactions

- As the input of a commission type formula which allows multiple inputs

- As the output of the forecast version of a formula

- As the input of the forecast version of a formula which allows multiple inputs

- As the tier expression of a dynamic dimension

- As a forecast input or output expression

2.8.5 Create Bonus Calculation Expressions

Bonus calculation expressions are used in a formula to pay a bonus to a resource that is based on something other than transactions. For example, if a company has had a successful year and wants to pay every employee a percentage of their annual salary as a bonus, it can be calculated by using employee salary information. You can map to this information in another schema and use it to calculate the bonus.

However, because bonus expressions, unlike commission expressions, are not based on individual transactions, you can't calculate bonuses based on transactions and you can't use any table that contains transactional information.

Bonus expressions cannot include a column from the following tables or from any external table that is mapped to these tables:

- CN_COMMISSION_HEADERS

- CN_COMMISSION_LINES

A Bonus calculation expression cannot be used as an embedded formula and cannot be mixed with a commission type formula. However, if you want to calculate bonuses based on the accumulated total sales credit for the resource, you can perform the following procedure.

1. Create a view that contains the total sales credit information.

2. Register this view on the Tables page. See Section 2.6, "Define Tables" for steps.

3. On the External Table page, enter a name (user definable). See Section 2.7, "Define External Table Mapping" for steps.

4. Choose the view created as the external source table and CN_SRP_PERIOD_ QUOTAS as the destination table.

5. Map source column and destination column, for example:

   - Salesrep_id > Salesrep_id

   - period_id > period_id

6. Define input/output expression using information from the external view, which will appear under external element.

7. Use the bonus expression when you define the bonus plan formula.

Guidelines

To create a Bonus Plan element, see Section 2.27.4, "Creating a Bonus Plan Element".

2.9 Define Rate Dimensions

Rate dimensions define the tiers that are used in a rate table. The Dimensions summary page displays all of the rate dimensions that have already been created.

A dimension must have at least one tier, but can have as many as you need. See above regarding dimension type.

There are four kinds of rate dimensions:

■ Amount: The rate tiers are amounts.

■ Percent: The rate tiers are percentages of a quota.

■ Expression: These rate dimensions reference calculation expressions, and can be used to create more complex rate tiers. For example, rather than creating a static set of rate tiers such as 0% to 25%, 25% to 50%, and so on, an expression rate dimension can be configured as 10% * Quota, 25% * Quota, and so on, using a calculation expression.

■ String: The rate tiers are alphanumeric, such as product numbers or the names of states.

These values comprise the ranges from which compensation is calculated in a rate table.

You can select only Amount or Percent dimensions on the Dimensions page when using Incentive Planning.

If a commission rate is based on multiple criteria, then a multidimensional rate table can be created to reflect all criteria. Use one dimension per criterion.

Oracle Incentive Compensation supports accumulated revenue with multidimensional rate tables. Accumulation is limited to one dimension.

See the *Oracle Incentive Compensation User Guide*, Section 6.3 for an example of rate dimensions.

Prerequisites

None

Login

Log in to HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Rate Dimensions

Steps

1. Click **Create**.

2. Enter information as required.

   For Amount or Percent dimensions, in the Rate Tiers area, you must enter numbers in the From and To columns. Follow the sequence, and do not leave any gaps in the rates.

   For String dimensions, enter the string value for the rate tier.

   For Expression dimensions, select expressions from the drop-down list for the From and To columns.

3. Click **Update**.

Note: You can also create rate dimensions on the Rate Table Details page (Incentive > Rate).

Guidelines

After you create a rate dimension with a type of String or Expression, you cannot change the type with a future update. However, for rate dimensions created with a type of Amount or Percent, you can update a rate dimension definition.

For expression rate dimensions, expressions must be defined in the application in order for the drop-down list to contain any selectable values.

If the application is unable to find a match in a string dimension in a rate table, the application picks the last rate value by default. For example, suppose that in the example above, a transaction has dimension values of 10,000, Iowa, and Service. No matches occur, and the rate table result is 9.25%, the last value in the Rate column.

This setup permits you to define a catch-all tier that captures all unmatched values. If you want the non-matching transactions to receive no commission, add OTHER as the last string value to each string dimension with a corresponding commission rate of 0%, for example.

Another method of dealing with non-matching transactions is to use classification rules. Transactions with attributes that do not match your classification rules will have a failed classification status. You can correct these failed transactions' attributes by changing their values and maintain a record of the adjustment through the manual adjustments window.

If you are using a dimension as part of a rate table in Incentive Planning, you can use only Amount and Percent type of dimensions. String and Expression type dimensions are not recognized.

Note: If you have string-based dimensions in a rate table, you must be sure that the formula input type matches the rate table dimension type. If they do not, the generated formula package assumes that all of the inputs evaluate to numeric values, and an error message and XCALC status results.

2.10 Define Rate Tables

Rate tables are used to establish compensation percentage rates or fixed amounts for different performance levels. The compensation formula and plan element determine the type of information to be compared to the rate table as well as how the resulting rate is used in the calculation.

Rate tables contain one or more dimension, of an amount, percent, expression, or string type. The rate table input depends on the kind of dimensions that are used. A multidimensional rate table can use different kinds of dimensions to generate a percent or amount result. See Section 2.9, "Define Rate Dimensions".

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Rate > Create

Steps

1. Enter information and click **Update**.

2. To assign or change commission rates, click the Commission Rates link to go to the Rate Table Detail - Commission Rates page. You can click the Rate Table link to return to the Rate Table Details page.

3. To create a new dimension while you're creating a rate table, click **Create** in the Dimension section and build it on the separate page.

4. Click **Update**.

Guidelines

Incentive Planning uses only one dimensional rate tables. Multidimensional rate tables are not permitted.

If a rate table is already assigned to a formula or plan element, it cannot be deleted and the commission type cannot be updated. Dimension assignments cannot be changed. An error message displays if you attempt to delete or change a rate table that is already assigned.

If you have string-based dimensions in a rate table, you must assign the same table or one of similar structure to the formula in the plan element. If you do not do this, the generated formula package assumes that all of the inputs evaluate to numeric values, and an error message and XCALC status results.

If a transaction matches the amount or percent that is the top of one tier and the bottom of the next higher tier, it is calculated using the higher tier. For example, using the percentage rate table below, a transaction that matches 50% exactly is paid at the 3% rate.

Percentage of Target	Commission
1-25%	1%
25-50%	2%
50-75%	3%

Percentage of Target	Commission
75-100%	4%

A rate table can be customized for an individual resource. See Section 2.32, "Customize Quota and Rates for Resources" for details.

2.11 Define Formulas

You have complete flexibility to create formulas for calculating compensation. Some formulas can be embedded in another formula definition or in a plan element definition. You can save an incomplete formula and return to complete it later.

Any expressions, rate tables, and that you use in a formula must be created before you define a formula. Expressions can be repeated in your formula and can be reused in other formulas as well. See Section 2.8.4, "Defining Calculation Expressions" for more information on the types of calculation expressions that you can use for commission and bonus formulas.

Prerequisites

Calculation expressions and rate tables must be created first.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Formula > Create

Steps

1. Enter a type of Commission or Bonus. See Guidelines.

   A Bonus Formula is a type of Formula where there are no links or references to transactions.

2. Indicate whether to apply transactions Individually or by Group.

   This affects how commission is calculated. See Guidelines.

3. Indicate any splits.

   Do not split tiers if you want a rate from the rate table applied to the full amount. Split tiers if you want portions of the full amount paid at each rate up to the top qualifying rate. (See Guidelines)

4. Check the Cumulative box if transactions are required to be aggregated in total.

   The rate applied will be determined by the transactions-total achieved to date within the interval. (See Guidelines.)

5. Check the Interval To Date box if you want to base the calculation on a period different from the plan element interval. (See Guidelines)

6. Check the Planning box if you want to use the formula for plan modeling.

   This validates that the formula can be used in Incentive Planning, and generates system code that is required for use in Incentive Planning.

7. Click **Update**.

8. Click the Expressions link on the side panel menu.

9. Select an input expression.

   You can use more than one input expression, but the number of input expressions must equal the number of dimensions in the rate table that you select later.

10. You can assign a forecast if you need it for Projected Compensation or for Income Planner in Oracle Field Sales.

11. Select an Output expression, and a forecast as needed.

12. Select a performance measure if you want to use it in the Year To Date Summary Report for comparison with achievement.

13. Click **Update**.

14. Click the Rate Tables link on the side panel menu to assign a rate table to the formula.

    You can view the rate table details and rates by clicking **Rate Table Details**.

15. Click the Detail link on the side panel menu and click **Generate**. If you have successfully created the formula, the status field above the Generate button changes from Incomplete to Complete. See Guidelines.

16. Click **Update**.

Guidelines

Formulas used in Incentive Planning must be designated as planning formulas with a specific combination of rules. Only one input expression is permitted.

For commission formulas, Individual Option for Transactions can be used with any Cumulative/Interval to Date option.

- By default Interval to Date and Cumulative options must be used together. You cannot select Interval to Date by itself. Split options are selectable (each is mutually exclusive).

- Accumulate can be selected by itself. Split options are selectable (each is mutually exclusive).

In commission formulas, Group by Interval for Transactions must be used with Cumulative. The difference between Group by Interval and Cumulative individual calculation is that Cumulative individual calculation calculates the commission for each individual transaction, whereas Group by Interval only calculates the total commission at the end of the interval.

Bonus formulas calculate only against Individual transaction options. Split options are selectable (each is mutually exclusive).

Use interval-to-date quotas and fixed amounts if:

- Calculation is to occur before the end of the plan element interval (for example, if the interval is quarter and calculation occurs monthly)

- Quotas are set cumulatively within the interval

- Performance to date is to be compared to the quota to date

Here is an example of split tiers. A rate table shows 0-1000 at 1%, 1000-2000 at 2%. The transaction amount is 1500. If you select No Split in the drop-down list, 2% is applied to the whole transaction amount of 1500. If you select Non-Proportional in the drop-down list, 1% is applied to 1000 and 2% is applied to 500.

The Proportional selection in the Split drop-down list is intended for use with amount rate tables. For example, if the rate table shows 0–1000 at 100, 1000–2000 at 200. The first transaction amount is 200. The commission for this transaction is 20 because 200 is one fifth of the first rate tier and one fifth of the 100 rate is 20. If the second transaction amount is 1300, the remaining four fifths of the first rate tier pays 80, and half of the second tier [(1300–800)/(2000–1000)] pays 100 (half of the rate 200). Total commission for the second transaction is 180.

In a multidimensional rate table, only one dimension can have split rate tiers.

If you are selecting the Cumulative or Split functions, you can use percent, amount, or expression type rate dimensions. You cannot use string dimensions.

Performance measures must use numeric expressions to work correctly. In a formula, if no performance measure is assigned, the application uses the first input expression. If that expression evaluates to string values, the calculation will fail. Therefore, it is important to assign a numeric performance measure when the first input expression is not numeric.

You must generate a formula for it to be available when you are selecting formulas for a plan element. Formulas that do not have a Complete status do not appear in the Formulas drop-down list. When you generate a formula the application verifies that the expressions and rate tables are compatible and that they will work when they are called during the calculation.

2.12 Define Resource Groups (Compensation Groups)

Compensation Groups are defined in Resource Manager. To define compensation groups, refer to appropriate sections of the Oracle *Common Application Components Implementation Guide* (Implementing Resource Manager) or Oracle *Common Application Components User Guide*. For Oracle Incentive Compensation, be sure to enter three usages on the Usages tab: Sales and Telesales, Sales Compensation, and Salesforce Planning.

2.13 Define Roles

In Oracle Incentive Compensation, compensation plans are assigned to roles, and resources are assigned a role. A Role may encompass one or more job descriptions and job titles. Within the role type used for Oracle Incentive Compensation, roles are assigned to resources, resource groups and resource teams. Oracle Resource Manager is delivered with predefined roles for all E-Business Suite modules, including Oracle Incentive Compensation, however you can define additional custom roles for your enterprise. See the Managing Roles and Role Types chapter in the *Oracle Common Application Components Implementation Guide* for the steps for this procedure.

2.14 Define Resources

Resources are created in Resource Manager. Refer to appropriate sections of the *Oracle Common Application Components Implementation Guide* (Implementing

Resource Manager) or *Oracle Common Application Components User Guide*. For Oracle Incentive Compensation, on the Receivables tab in Resource Manager be sure to enter a Start Date in the Date Active field and Quota Sales Credit as the Sales Credit Type.

2.14.1 Sales Compensation Payment Analyst Role Type

The Sales Compensation Payment Analyst is a new role type in this release. Use it whenever you define an analyst in Resource Manager for use in Oracle Incentive Compensation. Payment analysts belong to the payment analyst hierarchy, and have access to resources assigned to them and to any unassigned resources.

Resources that belong to groups with a usage of Sales Compensation Payment Analyst should be assigned only to a Sales Compensation Payment Analyst role, and they should not be given salesrep numbers. A resource cannot be assigned to both a Sales Compensation Payment Analyst role and to a Sales Compensation role.

2.14.2 Set Up Resources for Team Compensation

You can use Resource Manager to define resource teams that are recognized by Oracle Incentive Compensation when calculating compensation amounts for members of a team.

A transaction typically is associated with a single resource (especially if Oracle Order Management is the transaction source). If the resource on the transaction is a member of a team, then Oracle Incentive Compensation automatically calculates compensation for every member of the team. For example, assume Steve is a member of a team consisting of Steve, John, and Bill. A transaction for $100 is collected into OIC. Steve is entitled to 100% credit for this transaction, but because he is also a member of a team, OIC automatically gives 100% credit to John and Bill as well.

However, even though team members all receive credit for the transaction, the sales credit rolls up a sales hierarchy only on the original transaction. For example, if Steve, John, and Bill all report to Bob, Bob receives only $100 sales credit (from Steve). If Steve reports to Bob but John and Bill report to Sally, only Bob receives rollup sales credit. Even if Steve, John, and Bill each have different managers, only Bob receives the rollup sales credit.

Team compensation is different from split commissions set up in Sales Credit Allocation (see Chapter 4, "Implementing Sales Credit Allocation"). A team setup assigns the entire original sales credit amount to each group member, but Sales

Credit Allocation uses rules to assign credit to receivers, so it can divide the credit and assign it proportionally to different receivers.

Refer to the *Oracle Common Application Components Implementation Guide* for the specific steps necessary for creating a team and adding resources to it.

2.15 Assign Resources to Roles and Groups

Resources are assigned to roles and groups in Resource Manager. Refer to the appropriate sections of the *Oracle Common Application Components Implementation Guide* (Defining Dynamic Groups) or *Oracle Common Application Components User Guide*.

Guidelines

Do not change a role type or delete a role if it is already assigned to any resources. This can cause corrupted data in the system. Only the member flag and manager flag can be updated.

To be sure that commission is calculated correctly, a sales role should not be associated with a resource that is attached to a group with no group member role.

In some cases you may not be able to find Sales Compensation in the Role Type list of values. If this is the case, try the following:

Run the following SQL query.

```
select table_name, nullable
from dba_tab_columns
where column_name = 'ROLE_MODEL_ID'
and owner = 'CN' ;
```

This is the correct output for the above query:

TABLE_NAME	Nullable
CN_PLAN_TEXTS	Y
CN_ROLE_MODELS_ALL	N
CN_ROLE_PLAN_MAPS	Y
CN_ROLE_QUOTA_CATES	Y

TABLE_NAME	Nullable
CN_SRP_QUOTA_CATES_ALL	Y
CN_SRP_ROLE_DTLS_ALL	Y
CN_SRP_TOTAL_COMPS_ALL	Y

If `CN_ROLE_QUOTA_CATES`, `CN_SRP_QUOTA_CATES_ALL`, and `CN_SRP_ROLE_DTLS_ALL` are not set to 'Y', run the following SQL scripts and commit after each script:

```
ALTER TABLE CN.CN_ROLE_QUOTA_CATES MODIFY (ROLE_MODEL_ID
NULL);
```

```
ALTER TABLE CN.CN_SRP_QUOTA_CATES_ALL MODIFY (ROLE_MODEL_ID
NULL);
```

```
ALTER TABLE CN.CN_SRP_ROLE_DTLS_ALL MODIFY (ROLE_MODEL_ID
NULL);
```

2.16 Activate Pay Periods

Before paying a payrun, you must activate the pay period. This page displays essential information about pay periods that have been set up for your calendar and enables you to activate them.

Prerequisites

Pay periods must be defined in General Ledger. See Section 2.2, "General Ledger Setups".

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Pay Periods

Steps

1. Select a calendar.

2. Click **Apply**.

3. Activate a pay period by selecting **Active** in the Period Status column.

   Note: Active periods cannot be deactivated if they have transactions associated with them.

4. You can select Previous Year or Next Year to view earlier or later pay periods.

5. Click **Update**.

2.17 Define Pay Groups

A pay group defines the frequency of payments, such as monthly, for the resources who are assigned to the pay group. A resource must be assigned a pay group in order to be included in a payrun and receive commission. You can assign a pay group to a resource or to a role.

The Pay Groups page lists all pay groups that have already been created, and you can create new pay groups. In addition, after a pay group is defined, you can access a detail page to view periods and pay group assignments to resources.

Prerequisites

Calendars and related pay periods are defined in General Ledger and activated in Oracle Incentive Compensation. See Section 2.2, "General Ledger Setups" and Section 2.16, "Activate Pay Periods".

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Pay Group

Steps

1. Assign a name and dates to the pay group and click **Update**.

2. Click **Details** to view periods and pay group assignments, or to assign a pay group to a role.

3. Select from the View list and click **Apply**.

   The Role Assignment view provides fields to assign the pay group to other roles.

Guidelines

Each pay group can have one or many pay periods. A **pay period** is a range of dates over which calculated commissions are collected for payment.

Each pay group can be associated with one unpaid payrun at any time.

Pay groups can be assigned to multiple resources at the same time and you can start and end pay group assignments by individual resource at any time within the duration of the pay group.

When you assign a pay group to a resource, the application automatically checks to see if there are any conflicts between the start and end dates of the pay group and the start and end dates for every resource to which the pay group has been assigned. For example, if you define a pay group starting Jan 1 and ending on Mar 31 and you have assigned it to a resource, the application will not let you change the end date for the pay group assignment beyond Mar 31.

To assign a pay group to a resource, see Chapter 2.31, "Assign Pay Groups".

2.18 Set Up Collections

Two major processes are required to compute incentive compensation: data collection and compensation calculation.

Oracle Incentive Compensation collects data from the seeded sources: Oracle Receivables and Oracle Order Management (Order Booking), or from other data sources, and prepares that data to be transferred to the Oracle Incentive Compensation calculation processes.

2.18.1 Setting Up A New Transaction Source

You need to set up from which source you want to get the data for processing your transactions, and also to determine which Oracle Receivables or Oracle Order Management events you want to generate the transactions.

Prerequisites

Tables must be set up already in the transaction source.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection

Steps

1. Enter the name of the transaction source, and a type, which is an abbreviation for a legacy source.

   See Guidelines for restrictions.

2. Select a Line Table and a Key Column.

   These names, which you defined previously (see Section 2.6, "Define Tables"), tell the application the primary transaction line table to use for collecting transactions and the column in the transaction line table that uniquely identifies each transaction.

3. Click **Update**.

The Receivables Event area displays which receivables events are set up to collect transaction data. To set these events to collect data, check the box in the Collect Column next to the event for which you want to collect and click **Update**.

Guidelines

The Status column tells you whether the collection package has been generated for the Transaction Source since the latest setup changes were made.

For each Transaction Source there are three pieces of information:

- Name: User-defined and changeable, and may include legacy sources.

- Type: The short name of the Transaction Source. It is user-defined, must be unique, and cannot be changed after it is created. When creating a new transaction source, the Type (for example, the short name of the transaction source) has the following restrictions:

    - It cannot be empty

    - It must be unique

    - It cannot be the same type as any existing seeded transaction source, such as OC - Order Booking, or AR - Receivables.

    - It cannot be the same as the type of existing receivables events, such as INV, PMT, CBK, or WO.

- Status: Complete/Incomplete. This indicates whether the Collection package has been generated for the Transaction Source since the latest setup changes were made.

2.18.2 Adding the New Transaction Source to the TRX TYPES Lookup

For any open or custom transaction source, you must create a new line in the TRX TYPES lookup in Oracle Incentive Compensation. If this is not done, all transactions collected with the custom transaction source will not appear on the Transactions page (Transactions > Adjust) until after they have been loaded using the Load Transactions process.

Prerequisites

The new transaction source must be already be defined.

Login

Log in to HTML Applications

Responsibility

Incentive Compensation Super User

Navigation

Administration > Incentive > Collection

1. Find the value in the Type column for the custom transaction source.

2. Log into the Forms application as the Incentive Compensation Developer responsibility.

3. Navigate to Lookups.

4. Query the lookup type TRX TYPES.

5. Add a new row for the custom transaction source and enter the value from step 1 into the Code column in the lookup set.

6. Save.

2.18.3 Source Tables

This page is used to specify all the tables which are used during the creation of compensation transactions--the Direct Mapping tables. For the two standard transaction sources, Receivables Posting and Order Booking, all the transaction source data is predefined and cannot be deleted or modified.

A Line table is mandatory. It contains the line items against which compensation is to be paid. L_ORDER_LINES has been designated as the Line table.

The Key Column of the Line table is also mandatory. It is the field in the table that uniquely identifies each line.

Specify any additional tables to be used in creating compensation transactions in the Extra Direct Tables List.

Prerequisites

Tables must be registered in the Tables subtab (see Section 2.6, "Define Tables").

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Source Tables

Steps

1. Select a transaction source.

2. Click **Apply**.

3. Enter information into the Line Table and Header Table areas.

4. Enter any extra direct tables in the Extra Direct Tables area below.

5. Click **Update**.

Guidelines

Optionally, you can specify a header table in the Header Table area. If you specify a Header Table, also specify a key column for it and in the Line Table Header Identifier field specify the field in the line record (foreign key) which allows it to be joined to the Key Column field of the Header Table.

Before using any table, be sure that table is registered using the Tables page (Administration > Incentive > Tables). Table aliases are system defined. These are the values that you must use if you refer to a table by its alias.

2.18.4 Queries

If you are collecting data from a source other than the two standard collection sources, Receivables Posting and Order Booking, you need to tell Oracle Incentive Compensation from where to collect the transaction data and what data to collect. You can generate a list of transactions that are eligible for compensation using the Notification Query and Parameters.

The Queries subtab is active only if new transaction sources have been created, because for standard integration with Oracle Receivables and Oracle Order Management, you cannot edit the query conditions.

On the Queries page, the *Notification Query* area shows the exact query which will be used to create the Notification list of line-level transactions which are eligible for compensation. It marks transactions for collection and also enables tracking of those transactions during and after the collection process. The Parameter subsection of the Notification Query area allows you to narrow your focus, for example, by start date and end date.

The *Collection Query* area lists the exact tables and rows from those tables that you need to perform a collection.

Prerequisites

The Queries page is only accessible for nonstandard collection sources.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Queries

Steps

1. Enter the name of the parameter in the field.

2. Click **Update**.

   Note: The value field of the parameter is read-only on this page. When the parameter is created, the value field is empty. The value can be assigned in the Collection Submission - Runtime Parameter page before running the collection.

Guidelines

For any custom collection, the Notification query joins together the mandatory Line table (for example, L_ORDER_LINES) and the optional Header table (for example, L_ORDER_HEADERS). You must specify a header table, even though the purpose of the notification query is to get a list of identifiers from the Line table. The reason for this lies in the additional criterion which has been added to the end of the WHERE clause:

AND loh10000.booked_date BETWEEN p_start_date AND p_end_date

This restriction means that the user wants to collect only the orders that were booked between a specific start and end dates. The booked date of the order resides in the Order Header, so it is necessary to bring the L_ORDER_HEADERS table into the Notification Query to allow this. This requirement often applies, so the Header

Table field on the Source Tables is provided to enable this match without the need for advanced SQL knowledge.

P_start_date and p_end_date are parameters whose values are set by the user before collections is run for this Transaction Source. Although the parameters must be registered on this tab, their runtime values are set on a different page. A separate page is used because for any changes made on the Collections page to take effect, it is necessary to regenerate the collections package, whereas the parameter values can be changed without needing to regenerate. See Section 2.18.12.1, "Define Runtime Parameters".

The list of tables in the Collection query FROM clause (the Direct Mapping tables) consists of the Line table, the (optional) Header table and all of the tables listed as Extra Direct Tables on the Source tables tab.

The WHERE clause of the query already contains the necessary join information to get the right rows from the Line and Header tables. The user is required to complete the WHERE clause with all the join information necessary to get the right rows from the Extra Direct tables.

Once the information on the Queries page is entered, you have completed all the setup necessary to build a correct set of compensation transactions from the source tables in your legacy system. The next step is to define what information will actually be stored in the compensation transaction. That is the function of the Mapping tab.

2.18.5 Set Up Collection Mapping

Use the Mapping page to specify what data is needed to fill each destination column when a compensation record is collected from the Transaction Source.

When you move to the Mapping page for the first time after creating a new Transaction Source, you will see that the Source Expression/Destination list has been prepopulated with a number of records. These records are the mappings for the mandatory Destination Columns, those columns in CN_COMM_LINES_API that must always be filled before a CN_COMM_LINES_API record can be imported into Oracle Incentive Compensation. Examples of mandatory columns are Employee_Number, Transaction_Amount, Transaction_Type and Source_Doc_Type. You cannot delete these mandatory mappings.

In some cases the Source Expression Field for the mapping, that is, the description of the data used to fill the Destination Column, has been prepopulated and cannot be updated. An example of this is the mapping for Source_Doc_Type, which is set to be the Type that you enter when you name the Transaction Source ('LEG' in our

example). Most Source fields are left blank, though, and you have to define the source data for these mappings. You cannot generate a Collection package if any mapping has a blank Source Expression (although you can enter the value NULL in the Source Expression field if you need to).

The Source Expression field can contain a simple column specification or any other valid SQL expression. Each of the following is potentially a valid Source value:

NULL	NULL Value
'My Text'	literal value
booked_date	column_name
l_order_headers.booked_date	table_name.column_name
loh10000.booked_date	table_alias.column_name
NVL(lol10001.ordered_quantity, 0)	SQL function
my_function(loh10000.booked_date,lsc10002.salesrep_id)	user function

Direct and Indirect Mappings are set up differently. A description of each follows.

2.18.6 Direct Mappings

Direct Mappings are those in which the source data is derived exclusively from one or more tables in the FROM clause of the Collection Query (any table listed on the Source Tables tab).

If the source data does not include any database information at all, and it is just NULL or a literal value, then this can also be regarded as a Direct Mapping.

To define a Direct Mapping, type the appropriate SQL expression into the Source Expression field. A Direct Mapping is simply incorporated into the Collection Creation query that was described earlier. This single SQL statement already knows how to join all of the Direct Mapping tables together, so you need to define only what column information (if any) you need from these tables.

Notice that all seven of the example expressions shown in the table in 5.12 refer either to no table data at all, or only to columns from one of the Direct Mapping tables. These are therefore valid Direct mappings in the context of our example setup. Suppose for example that for the *Quantity* Destination Column, you want to use **NVL(lol10001.ordered_quantity, 0)** as the Source value. All you would need to do is type exactly this text into the Source Expression field for that mapping.

Although you can type this text directly into the Source field, this approach is potentially error prone. You need to spell the column name (*ordered_quantity*) correctly and you should normally precede that with either the full name of the source table (*l_order_lines*) or the exact alias of the table (*lol10001*). Instead of this manual procedure, you can click the Go button next to the Source Expression field to get a List of Values (LOV) to help you.

The required Source field text, for example, can be created as follows:

Prerequisites

Tables must exist in the Transaction Source and the destination. For relationship indirect mapping, a Join relationship must be set on the External Tables page of the Administration tab for any tables you plan to use.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Mapping

Steps

1. Enter a source expression in the Source Expression field.

2. Enter a destination.

3. Click **Update**.

2.18.7 Indirect Mappings

Indirect Mappings are implemented as UPDATES to the existing CN_COMM_ LINES_API record. You need to define the FROM and WHERE clauses of this UPDATE statement. The FROM clause indicates which table is being updated and the WHERE clause indicates under which conditions it is updated.

There are two ways that this mapping is performed: the Free-Form Indirect Mapping and the Relationship Indirect Mapping. With a Free-Form mapping you must manually enter the exact FROM/WHERE clause on the Mapping tab. With a Relationship Mapping you first use the External Tables form to define a join relationship between CN_COMM_LINES_API and the table from which the source data is to be collected. Then, on the Mapping tab, you specify this join relationship in the Relationship field. The FROM/WHERE field then becomes read-only and is automatically set according to that Relationship definition.

2.18.8 Example of Indirect Mapping

If you want to store the resource territory in the Attribute1 field of CN_COMM_ LINES_API, the territory can be taken from L_TERRITORIES, using the Salesrep_ ID, which is also present in the L_SALES_CREDITS table.

The first requirement to implement this is to set up a direct mapping to store the Salesrep_Id from L_SALES_CREDITS, as shown below.

Prerequisites

Tables must exist in the transaction Source and the destination. For relationship indirect mapping, a Join relationship must be set on the External Tables page of the Administration tab for any tables you plan to use.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Mapping

Steps

1. Create a new record in the mappings list.

2. Enter **lsc.salesrep_id** in the Source Expression field.

3. In the Destination field, select a spare column, such as Attribute99, from the LOV.

2.18.8.1 Free-Form Indirect Mapping

To set up a Free-Form Indirect Mapping for Territory, perform the following steps:

Prerequisites

Tables must exist in the transaction Source and the destination. For relationship indirect mapping, a Join relationship must be set on the External Tables page of the Administration tab for any tables you plan to use.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Mapping

Steps

1. Create a new record in the mappings list.

2. Enter **FROM l_territories lte WHERE lte.salesrep_id = api.attribute99** in the FROM/WHERE field.

3. Enter **lte.territory_name** in the Source Expression field.

   Note: If you click **Go** to do this, the Table Name LOV lists all of the tables that are currently registered in Oracle Incentive Compensation. This is because the FROM clause is free-form text which could contain multiple tables. It is easier to list all the tables for the user to choose from than to try to extract table names out of the FROM/WHERE clause.

4. In the Destination field, select Attribute1.

2.18.8.2 Relationship Indirect Mapping

Alternatively, you can set up a Relationship Indirect Mapping for Territory.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Login

Log in to Oracle HTML Applications.

Navigation

Administration > Incentive > External Tables

Steps

1. Use the External Tables page to set up a join relationship. In this relationship the Source Table is L_TERRITORIES and the Destination Table is CN_COMM_ LINES_API. The Source Column is *Salesrep_id* and the Destination Column is *Attribute99*.

2. Go back to the Mappings page of the Collections subtab (Administration > Incentive > Collections > Transaction Source > Mapping). Create a new record in the mappings list.

3. Select the relationship that you have just set up. The FROM/WHERE clause is automatically populated.

4. Enter **lte.territory_name** in the Source Expression field.

5. In the Destination field select Attribute1.

Whether you set this up as a Free-Form or a Relationship mapping, you will see that the following text is displayed beneath the Relationship field:

UPDATE cn_comm_lines_api api SET attribute1 = SELECT lte.territory_name

The FROM/WHERE field completes the statement:

FROM l_territories lte WHERE lte.salesrep_id = api.attribute99

This shows you in SQL exactly how your Indirect Mapping will be physically implemented.

2.18.8.3 Free-Form vs. Relationship Indirect Mapping

When should you use a Free-Form Indirect mapping and when should you use a Relationship Indirect mapping?

The Relationship Mapping is more restrictive than the Free-Form version. On the External Tables form you can define simple equivalence joins only between tables, which means joins of the form:

WHERE table1.columnA = table2.columnB

AND table1.columnC = table2.columnD

This rules out the use of other tests such as OR, BETWEEN, <, != and so on as well as the use of functions such as NVL and the outer join operator.

A relationship also only allows you to join to a single Indirect table. If you need to join multiple tables together, then you cannot use the Relationship option, unless you create a custom view to hide the join.

Therefore, Free-Form mapping is the one to choose.

There is no occasion where you actually have to choose a Relationship mapping over a Free-Form one. Relationship mappings are chosen because of setup simplicity (they can be reused in multiple mappings) and maintainability.

2.18.9 User Code Blocks

You can change the Collection processing for a transaction source in two ways--the addition of User Code Blocks and the specification of Transaction Filters (see Section 2.18.10, "Filters").

User code blocks are PL/SQL statements (functions and procedures) that you can insert at certain points in the collection procedure. You can insert user code blocks into the cn_comm_lines_api_all table.

User code blocks are single or multiple PL/SQL statements which you can choose to have inserted at three defined points within the Collect procedure that will be generated for your Transaction Source:

- At the beginning of the Notification query

- Between running the Notification and Collection queries

- After the Collection query has been run

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collections > Actions

Steps

1. Select a location for the user code block from the Location drop-down list.

2. Enter the code in the Code field.

3. Click **Update**.

2.18.10 Filters

Filters allow you to define criteria for the removal of unwanted transactions. Suppose, for example, you do not want to compensate people for any transaction with a value of less that $100 (assuming that all your sales are in dollars). You can specify this on the Actions page simply by entering the text *api.transaction_amount < 100* on a line in the Filters area.

You can also decide which method of filtering should be carried out for your transaction source, using the button in the Filter section. If you select Physical Delete then filtered transactions are physically deleted from CN_COMM_LINES_ API. If you select Mark As Filtered, the transactions are not deleted—they are marked as FILTERED and are never loaded into the header table CN_ COMMISSION_HEADERS.

Transaction filters are especially relevant to Oracle Receivables and Oracle Order Management, because you cannot change the collection query for those standard transaction sources. Filters allow you to define criteria for unwanted transactions.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collections > Actions

Steps

1. Select the method of filtering by clicking one of two buttons:

   - Mark as Filtered: The transaction will appear in CN_COMM_LINES_API but be marked as filtered.

   - Physically Delete: The transaction will be deleted from CN_COMM_ LINES_API.

2. Enter the text of the action you want in the Filters area of the page.

3. Click **Update**.

2.18.11 Generate

When the collection setup is complete, you are nearly ready to generate your Collections package. However, because clicking the Generate button on the Generate page will replace the existing version of the package with a new one based upon the current setup, first use the Test Generate button on the Generate page to test whether this new package is valid.

When the Test Generate button on this tab is clicked, a test version of the Collection package is generated for the selected Transaction Source.

After the setup is complete, use the Generate page to generate a test collections package. After it tests successfully, you can generate the final collections package from this page as well.

Prerequisites

Collections setup must be complete:

- Transaction sources

- Queries

- Collection mapping

- Direct and indirect mappings

- Actions

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Generate

Steps

1. Select the transaction source for which you want to run a test generation.

2. Click **Test Generate**.

3. If Error appears in the Test Status column, click it to open the details area below the Summary area.

4. Fix the errors and rerun the test generation until you are satisfied with the result.

5. You can click **Yes** or **No** in the Collect Flag to return to the Transaction Sources page and verify it or change it.

6. If everything is correct, click **Generate** to generate the actual Collection package.

Guidelines

The Error Text field lists compilation errors in the generated package together with their line numbers. The Package Text field displays the entire code, with line numbers, for the package. This way, if any errors are listed for the package, you can easily find the offending line of code in the Package Text field.

The usual cause of a compilation error is invalid SQL which has been typed in on the Queries or Mappings tabs or in a User code Block. It is easy to identify such

problems during the test generation, go back and fix them, and then rerun the test generate.

Apart from finding compilation errors, the other main use of this function is to allow you to scan through the generated package and confirm that it is doing what you had intended when you set up the information on the other tabs. It enables you, for example, to see exactly where in the Collect procedure your User Code Block(s) will be executed.

2.18.12 Run Collections

After performing all of the setups on Administration > Incentive > Collect, you are ready to run the package to collect transactions that you created in the Collection - Generate page. Collection Submission has three parts, represented by three pages:

- Runtime Parameter
- Submit Request
- View Request Status and Logs

2.18.12.1 Define Runtime Parameters

Use runtime parameters to narrow the range of transactions collected in a collection package if you are using a custom transaction source. For the standard transaction sources you cannot make any changes to the Source Tables or Queries tabs, so runtime parameters are not used.

For example, for a custom transaction source, a start date and end date can be defined. The parameters are defined on the Queries page in the setup process. These values are not provided during the collection setup, but are instead entered during the collection submission process. This allows you to change the values without regenerating the collection package.

Prerequisites

Parameters must already be created in the Collection setup process.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Navigation

Transaction > Collect > Collection Submission - Runtime Parameter

Steps

1. Select the parameter you want to change.

2. Enter a value in the Runtime Parameters field.

3. Click **Update**.

2.18.12.2 Submit a Request

You can submit a transaction collection request for any source.

Prerequisites

The collection setup must be completed and the collection package must have been generated successfully.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Navigation

Transaction > Collect > Submit Request

Steps

1. Select a collection type and click **Apply**.

  If you select Collect Custom Transaction Source, the parameter changes to Transaction Source. Specify the custom transaction source on which you want to run collection and skip to step 3.

2. Select Start Period and End Period dates.

3. Click **Submit Request.**

4. Click **OK** to submit the request.

5. Click **Refresh Data** periodically to monitor the progress of the calculation submission.

Guidelines

The Collect Orders collection type collects data from Oracle Order Management. The Collect Custom Transaction Sources collection type collects data from external sources. The other events collect data from Oracle Receivables.

The Process Log page shows the details of the processing of a request.

Transactions collected for a specific period cannot be collected again for the same period unless the collected_flag is set back to N or the records are physically deleted.

2.18.12.3 Viewing the Request Status and Logs

Data must be collected from the external tables into Oracle Incentive Compensation before calculation for payment can occur. You can view the status of the collection submission.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Navigation

Transaction > Collect > View Request Status

Steps

1. Query by one or more of the following:

    ■   Collection event type

    ■   Phase

    ■   Status

    You can also enter a search string in the Request ID field.

2. Click **Apply** to view a list of collection submissions.

3. Click **View Log** in the Log column to go to the Process Log.

2.18.13 Set Up A Standard Transaction Source

Oracle Incentive Compensation is delivered with two predefined Transaction Sources: Receivables Posting (integrated with Oracle Receivables) and Order Booking (integrated with Oracle Order Management).

The setup of Collections for these Transaction Sources is very similar to the setup of new user-defined sources that was described in the previous sections. The difference is that for the standard transaction sources you cannot make any changes to the Source Tables or Queries tabs. This is because collection from Oracle Receivables and Oracle Order Management is implemented as complex procedural logic rather than as simple Notification and Collection queries and it is not possible to express that logic on the Queries page.

Both of the standard transaction sources are delivered with a set of mappings to populate the important columns in CN_COMM_LINES_API. You can change source values for these mappings and create new mappings of your own to meet your business needs.

Prerequisites

None.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Navigation

Administration > Incentive > Collection > Mapping

Steps

1. Enter a source expression in the Source Expression field.

   The source expression can be the table column or an expression using the table column.

2. Enter a destination to which you want to map your source expression.

3. If you want to perform indirect mapping, click **Indirect** to open the Indirect Mapping Details area at the bottom of the page.

4. In the Indirect Mapping Details area, enter a join relationship.

   See Section 2.18.7, "Indirect Mappings" for more information.

5. Click **Update**.

Guidelines

When you first display the Mappings page for a standard transaction source, the Inherited column displays === for every mapping. This tells you that the mapping is a standard one and has not been changed. If you change the value in either the Source, Relationship or FROM/WHERE field for a standard mapping, the Inherited column will change to display =X=. If you want to revert a mapping to its original standard setup, click the Inherit button. The Source, Relationship and FROM/WHERE fields change back to their original values and the Inherit field reverts to ===. If you create any new mappings, the Inherited column is blank for these rows and the Inherit button has no effect.

2.18.14 Receivables Posting and Order Booking Special Features

2.18.14.1 Receivables Posting

The predefined Oracle Receivables data source differs slightly from any other data source because it really represents five transaction sources that have been combined into one so that the sources can share a set of mappings. The five sources are referred to as receivables events and are as follows:

- Invoice, credit memo posting
- Payment, giveback posting
- Writeoff posting
- Takeback posting
- Revenue Adjustment Posting

A credit memo is generated when an invoice is fully or partially reversed and posted to Oracle General Ledger. Credit memos are later collected and applied against transactions. A giveback is a past due invoice that had been taken back but has now been paid. For a writeoff posting, a sale is written off the books and posted to Oracle General Ledger. For a takeback posting, if an invoice due date goes beyond the set grace period, the credit for the sale is deducted from the resource's sales credit. Revenue Adjustment Posting is used to collect revenue adjustments

that were made in Oracle Receivables using the Revenue Adjustment Module (RAM).

These events occur when the relevant transaction is posted to the Oracle General Ledger application.

The transaction collection queries for these events are all based around the same core set of Receivables source tables, but the tables are joined together in different ways so five different Transaction Sources would normally be required. The five have been combined into a single Transaction Source so that you set up only the Mappings that you want once and they are applied to the collection of Compensation Transactions for all five Events.

When you click the Generate button for the receivables transaction source (Administration > Incentive > Collections > Generate), five packages are generated, one for each Receivables event. This generation takes five times as long as for any other transaction Source. However, you may not be interested in all of these events. It is therefore possible to restrict the generation to only those packages for the events that you require.

Login
Log in to Oracle HTML Applications.

Responsibility
Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation
Administration > Incentive > Collection

Steps
1. In the Receivables Event area, check the boxes in the Collect column for which you want to collect transactions and click **Update**.

2. Click **Generate** to open the Collection - Generate page.

3. Click **Generate**.

Guidelines

Each receivables event has a dedicated concurrent program. Each of these requires two parameters: a start period and end period. The parameter entry is supported by a list of values. The concurrent programs are as follows:

- Collect Invoices

- Collect Takebacks

- Collect Payments and Givebacks

- Collect Writeoffs

- Collect Revenue Adjustments

2.18.14.2 Order Booking

Compared with Oracle Receivables, the Order Booking transaction source behaves more like the user-defined transaction sources which were defined earlier.

A single collection package, Collect Orders, is run. The concurrent program requires two parameters, a start period and an end period. The parameter entry is supported by a list of values.

See the *Oracle Incentive Compensation User Guide*, section 8.3.1 for more information.

2.18.15 Adjustments

Order information often is changed after the Order has been set to the status of Booked. Such changes, known as adjustments, can be automatically applied to transactions which have already been collected. If a change is made to any line on an order, then all of the sales credits (compensation transactions) for that line are considered to be changed. There are two possible scenarios:

- Scenario 1: The compensation transactions have been collected but have not been loaded into Oracle Incentive Compensation.

- Scenario 2: The compensation transactions have been collected and also loaded into Oracle Incentive Compensation.

In the scenario 1, the transactions have only got as far as the CN_COMM_LINES_ API table. In such cases the original transactions are marked OBSOLETE and they will be re-collected into CN_COMM_LINES_API with their new values the next time Collect Orders is run.

In the scenario 2, the transactions are already inside Oracle Incentive Compensation and may have even been used to calculate resource commission. This requires a

different approach. The original transactions in CN_COMM_LINES_API are marked FROZEN. For each of these a reversing transaction is also created in CN_COMM_LINES_API. This is a duplicate of the FROZEN line, but with an opposite polarity (usually meaning it becomes negative) on the Transaction Amount. This transaction will have the effect of reversing out the original. Finally, as in scenario 1, the Compensation Transactions for this line will be re-collected into CN_COMM_LINES_API with their new values the next time Collect Orders is run.

Each time Collect Orders is run, the list of unprocessed updated Order Lines must first be processed. This can take a long time to complete. To avoid having a long wait when running Collect Orders against the Oracle Incentive Compensation tables, it is a good idea to process this list of updated Order Lines at regular intervals (perhaps daily). There is a Concurrent Program to do this called *Order Update Notification*.

Coping With Adjustments

You can make adjustments to transactions in your custom transaction sources in the same way as you do with seeded Collections from Oracle Order Management. All you need to do is to call the Collections API (CN_NOTIFICATION_PUB.Create_Notification), identifying the transaction that has been changed. See below.

If you specified a Header Table on your Source Tables tab then you need to pass the unique identifiers of both the Header record and the Line record of the changed transaction. Otherwise only the identifier of the Line record is required.

Suppose that Collections has already been run for October 2004 transactions in the example legacy system. Also, those transactions are already imported into Oracle Incentive Compensation. Now, a change is made to one of the orders for that month. In the table below, the ID of the Order Header is 1001 and the ID of the Order Line is 1234. To notify Oracle Incentive Compensation of this change you make the following call:

CN_NOTIFICATION_PUB.Create_Notification

This API can be called either:

- At the time that the adjustment was done in the source system
- In the prenotification phase, or
- In the notification phase itself.

This is the code:

```
( p_api_version        => 1.0,
  x_return_status      => l_return_status,  -- OUT parameter
```

```
x_msg_count            => l_msg_count,       -- OUT parameter
x_msg_data             => l_msg_data,        -- OUT parameter
p_line_id              =>1234,               -- Line Table Id
p_source_doc_type      => 'LEG',             -- Transaction Source Type
p_adjusted_flag        => 'Y',               -- Adjustment(not new record)
p_header_id            =>1001,               -- Header Table Identifier
p_org_id               => your_org_id,       -- Operating Unit (optional)
x_loading_status       =>  l_loading_status  -- OUT parameter
);
```

The next time Collections is run for this Transaction Source, reversing transactions will be created to nullify all sales credits associated with this transaction line. All sales credits will then be collected again with the new values in. This reversal and re-collection of the October transaction will occur even if you specify that you want to collect only November transactions this time.

Note: To understand the p_org_id parameter, you need to first understand the Oracle Applications 'Multi-org' strategy, which allows data for multiple operating units to exist, partitioned from each other, within a single database. Discussion of Multi-org is beyond the scope of this document. Please see *Multiple Organizations in Oracle Applications*.

If your procedure which calls *CN_NOTIFICATION_PUB.Create_Notification* is running in a database session where the Org-Id has been set, and your procedure is only dealing with transactions for this Org-Id, then you can omit the p_org_id parameter. In any other situation (for example where you have a single procedure or database trigger which detects updates to transactions from multiple Org-Ids) you must specify the correct value of p_org_id for the transaction when you call *Create_Notification*.

When collecting an invoice, if a resource is assigned non revenue credit only, quantity is not populated for this particular resource. However, the transaction amount is populated as the total of revenue amount and non revenue amount. This can cause some confusion. If you want to display the quantity for resources with non revenue credit only, set the profile OSC: Apply non-revenue split to quantity to Y (see Appendix C, "System Profile Options".

2.19 Set Up Expense/Liability Account Mapping

Information can be transferred and posted from Oracle Incentive Compensation to Oracle Payable. This function is used for outside suppliers and vendors, not for regular employees. Regular employees are paid using Oracle Payroll.

Expense and Liability Accounts can be assigned at four levels: plan element, revenue class, classification, and custom. This assignment is done on the System Parameters page (See Section 2.3.4, "Payment" for details).

2.19.1 Account Generator

Expense and Liability Account information is supported by default at four levels of detail:

- Revenue Class
- Plan Element
- Classification
- Custom

See Guidelines for more about the four levels.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Parameter

Steps

1. In the Payment area, select the level of account generation.

2. Click **Update**.

If you select the Classification level of Account Generation, you must perform the following setup, which is similar to the current classification Ruleset procedure.

Navigation

Administration > Incentive > Ruleset

Steps

1. Define the ruleset with a type of Account Generation.

2. Click **Update**.

3. Click the Rules link in the Rules column.

4. In the lower part of the page, enter a name for the new rule.

5. Select Expense Code and Liability Code names from the lists of values.

6. Click **Update**.

7. Click the Attributes link for the new rule.

8. Choose an attribute and a value.

9. You can check the Not box to specifically exclude the value of the attribute from classification.

10. Enter any additional attributes for the rule.

    Note: Every attribute is assumed to be linked to other attributes with AND. If you want any of the attributes to be related with OR, use the Build Expression tab to relate the first two attributes with AND or OR.

11. Save the rule.

12. To add rules in the rules hierarchy, position your cursor over the parent rule, right click, and choose New Rule. Repeat the steps.

13. Return to the Ruleset form for every ruleset that has new or changed rules and click **Synchronize**.

In order for the system to know to transfer the account code, you must first be able to classify the transactions. To classify the transaction, see Section 2.24, "Define Classification Rulesets". Create the same rule as you created in the Ruleset for Account Generation. Then, you can calculate and pay for transactions.

Guidelines

The application checks to see what account generator level has been set. Based on this level, the appropriate Accounts Payable accounts are associated to the line item. The four levels are as follows:

- Revenue Class: Each revenue class will be assigned a specific liability and expense account. This option should be used if tracking expenses for each product is required.

- Plan Element: Each plan element can be assigned a specific liability and expense account. This option should be used if all products assigned to the plan element will be assigned to the same expense and liability account.

- Classification: An entire rule can be assigned a specific liability and expense account.

- Custom: The Custom option provides flexibility for companies that want to pass along expense and liability data which are independent of the normal Oracle Incentive Compensation classification process. Mapping to this data is required.

Note: If the account generator level population is set to Classification or Revenue Class, the system profile Pay by Transaction must be set to Yes or Y for the account to be populated to the Accounts Payable interface.

2.20 Set Up Plan Element to Oracle Payroll Pay Element Mapping

Oracle Incentive Compensation collects transactions, calculates compensation, and creates a payrun. However, in order to pay a resource that has earned compensation, you must set up an integration with Oracle Payroll or some other payroll system. This is the purpose of mapping the plan elements in Oracle Incentive Compensation to the Pay Elements in Oracle Payroll.

Prerequisites

Plan elements and pay elements must already be created. See Section 2.27, "Define Plan Elements" for plan element setup; see Oracle HRMS documentation for pay element setup.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Payroll

Steps

If you want to make a change in mapping or dates to an existing line, perform the following procedure.

1. Enter the changes to the Plan Element or Pay Element fields.

2. Check the Remove box if you want to eliminate the plan element to pay element mapping.

3. Click the Inactive Employees box if you want to keep the mapping but not use it now.

4. Click **Update** to complete steps 2 and 3.

5. You can click **Element Input** to go to the Pay Element Input Values Mapping page (see Section 2.20.1, "Pay Element Input Values Mapping").

To enter a new mapping, perform the following procedure.

1. Enter a plan element in the first blank plan element field.

2. Enter the pay element from Oracle Payroll that you want to use.

3. Enter a start date and an end date.

4. Click **Update**.

Guidelines

The mapping information is stored in the CN_QUOTA_PAY_ELEMENT_ALL map table. The three-column table below shows examples of how the mapping is set up between Oracle Incentive Compensation plan elements and Oracle Payroll pay elements, with the resource status indicated in the third column:

Plan Element (OIC)	Pay Element (Payroll)	Resource Status
01 Account Quota	Commission Pay	ACTIVE
01 Account Quota	Commission Pay	INACTIVE
Recoverable Payment Plan	Commission Pay	ACTIVE
Payment Plan Recovery	Commission Pay	ACTIVE
Q1 OCG Bonus	Bonus Pay	ACTIVE
Q1 OCG Bonus	Bonus Pay	INACTIVE
Education	Commission Pay	ACTIVE

Plan Element (OIC)	Pay Element (Payroll)	Resource Status
Education	Commission Pay	INACTIVE

In the Plan Element field, two seeded values are available to be used when recoveries must be performed but they are not related to a specific plan element:

- Payment Recovery: Amounts need to be recovered, but multiple plan elements are consolidated on the payment worksheet.

- Carry Over Plan Element: The plan element end date has passed but recoverable amounts remain. This value serves as a placeholder until the amount is recovered.

If the Pay by Transaction profile is set to No (N), the commission amounts are summarized at the plan element level. Therefore, the pay element name is displayed against the plan element name on the Payment Transactions page if the mapping exists and the payrun date falls within the mapping date range. But, in the case of a payment recovery, the amounts are aggregated at the resource level and not at the plan element level, so the pay element is listed but the plan element name is not displayed.

For a given date range, a pay element can be mapped to more than one plan element, but a plan element can be mapped to only one pay element. However, a plan element can be mapped to the same or a different pay element for an overlapping date range if the box in the Inactive Employee column is checked.

A plan element and pay element mapping cannot be deleted unless the element input lines mapping between the table name and column name are deleted first. After the payrun has been paid that used a plan element which has been mapped, it can be end dated as per the end dating rules mentioned above.

2.20.1 Pay Element Input Values Mapping

If a pay element in Oracle Payroll has been defined to have input values, then you can define a mapping in Oracle Incentive Compensation that identifies which data columns in application tables map to the input value of a pay element. The following tables can be used to map Oracle Incentive Compensation to pay element input values:

CN_PAYRUNS

CN_SALESREPS

CN_PAYMENT_TRANSACTIONS

This mapping is stored in the CN_PAY_ELEMENT_INPUTS table in Oracle Incentive Compensation.

Prerequisites

Plan elements and pay elements must already be created.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Payroll

Steps

1. Query a plan element or pay element.

2. Click the Element Inputs link next to the plan element and pay element that you want to work on.

3. Select a table name and a column name.

4. Click **Update**.

2.21 Map Classification Attributes and Collection Attributes

Use the Columns page to define the descriptive flexfields in the CN_COMMISSION_HEADERS table. You can link a user Name for an attribute to the application's name for it. This process makes the names easier to use because they specifically describe the attribute. For example, Sales Region is easier to remember and apply than Attribute 6. You can find these fields exposed on the Transaction Details - Adjust page (Transaction > Adjust > Adjust).

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Tables

Steps

1. Query the CN schema and click **Update**.

   Note: Be sure to enter CN in uppercase letters.

2. Scroll down to CN_COMMISSION_HEADERS.

3. Click **Columns**.

4. Select a View and click **Apply.**

5. Search to find the column name you need.

   You can use one of the numbered Attribute columns to create a new column.

6. Enter a user name relevant to your enterprise.

7. Check the Usage box to identify that this column is available for building expressions for formulas.

8. The Foreign Key box feature is currently not in use.

9. Click **Update**.

2.22 Define Revenue Classes

Revenue classes are user-defined categories of business revenue used to determine whether sales credit is applied toward a compensation payment. Revenue classes are placed in hierarchies composed of broader revenue classes at the top, or root, with subclasses as children of the root. A revenue class hierarchy makes it possible to pay compensation for broader revenue classes without specifying all possible subclasses in a compensation plan.

Each revenue class represents a different type of sale for which an organization pays compensation. Different companies have different revenue classes, because each sales organization awards compensation differently. After defining your

organization's revenue classes, you assign one or more revenue classes to a plan element, assign the compensation plan to a role, and then assign the role to a resource. By assigning revenue classes, you specify the types of revenue for which each resource can earn compensation.

All revenue classes on the same plan element share the same quota and compensation rate table. If revenue classes in a compensation plan have different quotas or are paid according to different rate tables, you must create a plan element for each revenue class that has a different quota or compensation rate.

Many companies award compensation based on the types of products or services its salespeople sell. Depending on the business practices of your sales organization, you might award compensation based on factors other than products or services sold. For example:

- Your sales organization might have customer account teams, where salespeople only receive compensation for sales to their assigned set of accounts. In this case, each customer account is probably a separate Oracle Incentive Compensation revenue class.

- Your company might organize its sales strategy around expansion into new markets, where each new market is defined as a separate revenue class.

- Your company might use industry-based incentive compensation, paying compensation only for sales made in a resource's assigned set of industries.

For a specific example, a computer hardware company awards compensation based on the types of products or services its salespeople sell. At the broadest level, the company sells PCs, peripherals, education services, consulting services, and support maintenance services. While some types of resources, such as resellers, are only authorized to sell a subset of this offering, the company awards compensation to some of its salespeople for all types of products and services. Thus, for the company, each product or service category is an Oracle Incentive Compensation revenue class.

Each transaction gets classified with a specific revenue class. A plan element lists all revenue classes that are eligible for commission calculation. Therefore, using the revenue class, a transaction is mapped to the plan element and thus the formula where commissions are calculated.

Login
Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Revenue Class

Steps

1. Enter the name in the first blank Name field and an optional description.

2. Select an expense code and a liability code if needed to integrate with Oracle Payable.

   The default wildcard (%-%-%-%) indicates the number of segments that are defined for the expense codes and liability codes. Each percent sign represents a segment.

3. To search for liability codes and expense codes, click the search icon to open a list of values. You can filter a search when using either list of values by entering values into the default wildcard, for example 1-%-%-%.

4. Click **Update**.

Guidelines

Be sure to keep the names of revenue classes to 30 characters or fewer. Names longer than 30 characters can cause errors when you attempt to import them into Oracle Incentive Compensation.

If you want to update a revenue class name, description, expense code, or liability code, you must clear any default wildcards from the Expense Code and Liability Code fields before clicking **Update**. If expense codes or liability codes are already assigned to the revenue class, they can remain. Any cleared wildcards reappear in the Expense Code and the Liability Code fields after you update the revenue class.

2.23 Define Revenue Class Hierarchy

When matching the revenue class on a compensation transaction, such as a sales order, to a revenue class on a resource's compensation plan, the class of the classified transaction is rolled up in the revenue class hierarchy to determine matches to any revenue class on the plan.

You can use this process to create new hierarchies or to make changes to an existing hierarchy. To access an already created hierarchy, simply click **Details** on the Hierarchy Types page and click Details next to the hierarchy name on the Hierarchy page that appears.

There are three placements of nodes that you can make for any hierarchy:

- Root

- Parent

- Child

Root node is the highest level of the hierarchy. In Oracle Incentive Compensation, you can place as many nodes under the root node as necessary to meet the business objective. Oracle Incentive Compensation provides you with the flexibility of creating multiple root nodes. For example, you can create a root node for France Products and another for Germany Products.

A parent node is a node that has at least one node that rolls up to it. A parent node typically summarizes information concerning the nodes below it, referred to as child nodes. An example of a parent node would be Western States and under it child nodes called California, Oregon and Washington.

A child node rolls up to a parent node. A child node can roll up to only one parent node. For example, under the parent node of California the child nodes could be called San Francisco and Los Angeles.

You can create a new hierarchy under an existing hierarchy type, or you can create a new hierarchy type and then build the hierarchy there.

The hierarchy determines the eligibility of other revenue classes. A transaction can be classified with a revenue class at a granular level, but by creating a revenue class hierarchy, other revenue classes are eligible for compensation as long as they exist higher in the hierarchy.

For example, sales representatives sell laptops and desktop computers and the transactions are classified at the lowest level, the product name. In the revenue class hierarchy, the revenue class All Computers exists higher than the Laptops and Desktops revenue classes. The manager of the sales representatives does not have to list Laptops and Desktops on her plan element but only All Computers, because it exists higher in the hierarchy. She will get calculated commissions even though the transaction was classified as Laptops.

You cannot delete the Base Node of the seeded Revenue Class hierarchy.

For more information on the structure of a hierarchy, see Guidelines.

Prerequisites

Revenue classes have been created (see Section 2.22, "Define Revenue Classes").

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Hierarchy

Steps

1. Create a new hierarchy on the first blank line.

   The Base Table is the domain where the elements are located that you want to use in your hierarchy. The primary key identifies each hierarchical element in the base table.

2. Click **Update**.

3. Click **Details** and enter the name of the new hierarchy.

4. Enter the name of the new hierarchy in the Name field and click **Update**.

5. Click **Details** and enter the start and end dates for the hierarchy.

   Only one revenue class hierarchy can be effective at a time.

6. Click **Update**.

7. Click **Details**.

   The application provides a default root class called Hierarchy Base Node.

8. Start building a hierarchy by entering one or more root class names.

   When you select the root name, a plus sign next to the name indicates you can click it to expand and view the hierarchy that is part of the selected root. You can expand and view any level of the hierarchy.

9. To add a child, select the parent revenue class for which you want to add a child, click the Add Child button, and select where you want the new node to appear.

   ■ Add new node under selected node: The node is added as a child to the selected parent node

   ■ Add new node as root node: The node is added to the hierarchy as another base node

10. Select a new node type.

11. Click **Update** to add the revenue class to the hierarchy.

12. Repeat the steps to build your hierarchy.

13. Click **Update** periodically as you go and at the end to save your work.

Guidelines

Hierarchy deletes are cascading. This means that if you delete a node, all children of that node are deleted along with it.

You can create as many revenue class hierarchies as you need. However, only one revenue class hierarchy can be effective at a time. Use the interval dates to keep the hierarchies separate.

You can import any portion of another hierarchy to become a child of your selected node in the hierarchy you are building. See the Imports and Exports section in the *Oracle Incentive Compensation User Guide*, Chapter 8.

2.24 Define Classification Rulesets

A classification ruleset is used to classify sales transactions to determine the appropriate revenue class for the transaction as part of calculating commissions. Then, using the revenue class, a transaction is matched with a compensation plan and a compensation amount to be paid when the transaction is calculated. Add a rules hierarchy that accurately reflects your business requirements. The rule names are user defined, but many customers have found it useful to give rules a name that is similar to the revenue classes that is assigned to the rule. Rules do not require unique names.

Rulesets are of three types, Revenue Classification, Account Generation, and Plan Element Classification.

- Revenue Classification defines the rules that are used to identify a revenue class for each transaction that the system processes as part of calculating commissions.

- Account Generation is used to integrate Oracle Incentive Compensation automatically with Accounts Payable and to classify transactions to identify Expense and Liability Accounts. See Section 2.19.1, "Account Generator" for details.

- Plan Element Classification is used to classify quotes, opportunities, and so on, for the Projected Compensation API. See Guidelines.

The Rulesets page lists all rulesets that have already been created. To view or edit a ruleset, find it and click **Rules**. Or, use the Saved Searches drop-down list. Click **Personalize** to create a custom search.

Prerequisites

Revenue Classes have been created (see Section 2.22, "Define Revenue Classes") and any necessary Attribute flexfields of the CN_COMMISSION_HEADERS table have been defined (see Section 2.6, "Define Tables"). These flexfields become the attributes that are evaluated when determining a revenue class.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Ruleset

Steps

1. Create a new ruleset in the first blank field.

   Select the ruleset type.

2. Click **Update**.

Note: If the ruleset dates overlap the dates of another ruleset, an error message displays at the top of the page and you cannot continue with creating the ruleset.

3. You can click the **Rules** link in the Rules column to display the Rules Hierarchy.

2.24.1 Build a Rules Hierarchy

At this point, the ruleset status is incomplete. Now, you must create the rules and put them into a hierarchy. A rules hierarchy sets up relationships between rules. The structure of a rules hierarchy starts with a root, then adds one or more parent rules, and then as many child rules as needed. A rule can have one or more child rules or siblings.

Prerequisites

Classification Ruleset has been created (see Section 2.24, "Define Classification Rulesets").

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Ruleset > Rules link

Steps

1. Query for a rule.

2. To add a rule, in the lower section of the Rules Hierarchy page, select Root from the Add Rule column list.

3. Name the rule and it a revenue class name. See Guidelines.

4. Click **Update**.

5. To define attributes for the rule, click **Attributes** in the Rule Attributes column.

For Revenue Classification, all of the columns defined in the CN_COMMISSION_HEADERS table that have been designated for classification appear as attributes in the drop-down list. If more attributes are needed, then the administrator must modify the CN_COMMISSION_HEADERS table. For Plan Element classification rulesets, the only selection in the Attribute column is Projection Identifier, and the list of values for the Value field is not usable.

6. In each of the three areas, enter values in the Attribute field:

   ■ For Single Value attributes, enter a single value.

   ■ For Range Value attributes, enter a low value and a high value.

   ■ For Hierarchy values, enter a hierarchy and a value.

7. You can check the Not Flag box to indicate that you want to exclude that value from the rule. See Guidelines.

8. To add rules in the hierarchy of rules, select the button next to the rule in the Add Child/Sibling column, then enter the rule information in the lower section of the page.

   An alternative is to drill down on the rule name link itself. This takes you to the Create Rules page. The same functionality for creating child and sibling rules is available here as it is on the Rules Hierarchy page.

9. When you are done, return to the Rulesets page and check the Synchronize box next to the changed ruleset. Click **Update**. See Guidelines.

   If any rules do not have attributes, an error message displays along the top of the page indicating which rule requires attributes to be assigned to it. The messages continue to display for one rule at a time until all contain attributes.

10. To get to the Build Expression page, Return to the Rules Hierarchy page. Click **Expressions** in the Rule Expression column. The Expressions link is enabled only when the rule has two or more attributes defined. See Guidelines.

11. Click **Update**.

Guidelines

The classification engines evaluates the rules from top-to-bottom, left-to-right. As soon as a positive match is made and any child rules evaluated, the transaction is classified and no longer evaluated against any other rules. The rules higher in the hierarchy must be built accordingly so that the transactions locate the appropriate rule.

You can define multiple date-effective classification rulesets. Ruleset active dates may not overlap.

When you make changes to a ruleset, you must synchronize it. When you check the Synchronize box and click **Update**, the application generates a PL/SQL script based on the revenue classes and revenue class rules and saves it in an internal table. Before the status changes from Incomplete to Complete, it may display Install Pending. You do not need to synchronize a ruleset if you only rearranged the rules but did not otherwise change them.

A hierarchy of rules can be defined for each ruleset.

Every rule must have at least one attribute.

You can build expressions on the rules using the Build Expression page.

A rule may or may not have a revenue class. If the rule does not have a revenue class, then its children rules must define the revenue class. If a rule has a revenue class, then the revenue class is assigned to the transaction only if none of its child rules match the transaction.

If you specify high and low values in a rule condition, the values can be alphanumeric.

Every attribute is assumed to be linked to other attributes with AND. If you want any of the attributes to be related with OR, use the Build Expression page to relate the first two attributes with AND or OR.

Selecting the Hierarchy Values option allows you to enter the value in the hierarchy you want to match. The fields that appear are Hierarchy and Hierarchy Values. If the value of the transaction attribute rolls up the hierarchy to the value you specify, then the compensation transaction satisfies the condition.

You can specify the exclusion of a value you defined by checking the Not box. The compensation transaction satisfies the condition if the attribute is not equal to the specified value, is not between the range of values specified, or does not roll up to the specified ancestor value.

When you are setting up a Plan Element Classification ruleset for Projected Compensation, *****

Warning: Always customize the classification rules using the setup forms available. Do not modify the generated PL/SQL code. Manual changes to the PL/SQL code are not automatically copied into the application.

Troubleshooting

When a transaction fails classification for a rule that uses hierarchy values, the most common problem is that the primary key value in the transaction attribute column is not the same as the primary key value defined in the hierarchy (the value for the EXTERNAL_ID field).

2.25 Define Interval Types

Intervals are associated to a plan element to accumulate achievements for a specific period of time. The accumulated achievements in turn determine the rate at which commission is calculated.

Commonly used intervals include period, quarter, and year. These intervals are predefined. You must define interval numbers for these intervals using the Interval Numbers page before they can be selected during creation of plan elements.

The Interval Types page displays all intervals that have been created and enables creation of new intervals.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Interval Types > Create

Steps

1. Enter a name and description for the new interval and click **Update**.

2. Select the year for which you want to enter interval numbers.

3. Enter interval numbers. See Guidelines for suggested formats.

4. Click **Update**.

Guidelines

Interval numbers are user definable. When an interval is first created, all of the interval number fields contain a single numeral 1. You must then manually enter the interval numbers that you need for each year. After you have entered the numbers and clicked Update, they will remain stored, even if you select other years from the drop-down list.

Interval numbers must be unique for each interval whenever the interval is monthly, quarterly, or yearly. For example,

For quarterly intervals:

- JAN-05, FEB-05, MAR-05 are all numbered 2005001
- APR-05, MAY-05, JUN-05 are all numbered 2005002, and so on.

For Monthly intervals:

- JAN-05 is numbered 2005001
- FEB-05 is numbered 2005002
- MAR-05 is numbered 2005003, and so on.

2.26 Define Credit Types

Credit types are associated with plan elements and are also used in reporting. Credit types include Functional Currency, points, air miles, or any custom form of credit that you want. These definitions are optional, and nonmonetary credits must be converted to functional currency to be paid. Only nonmonetary credit types can be defined. Oracle Incentive Compensation uses the functional currency to perform all calculations. It is the currency used by General Ledger to record transactions and maintain accounting data for the set of books.

2.26.1 View, Change, or Remove a Credit Type

You can view, change, or remove a credit type.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation
Administration > Incentive > Credit Type

Steps
1. Query for a credit type.

2. Change the values in the Precision and Extended Precision fields as needed.

    Precision defines the number of decimal places in which the credit type is displayed. Extended precision is the number of places in which calculation is performed.

3. Click **Update**.

2.26.2 Add a New Credit Type

You can add a new credit type.

Login
Log in to Oracle HTML Applications.

Responsibility
Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation
Administration > Incentive > Credit Type

Steps
1. Enter a name and precision and extended precision information.

2. Check the Functional Currency box if you want the new credit type to be used as the functional currency.

3. Click **Update**.

2.26.3 Credit Conversion

Use the Conversion Factor page to set conversion factors for converting one credit type to another, such as setting the conversion rate between the nonmonetary credit type and the functional currency. The credit types are defined using the Credit Types page.

Login

Log in to HTML Applications.

Responsibility

Incentive Compensation Super User

Navigation

Administration > Incentive > Credit Conversion

Steps

1. Enter a credit type and indicate the credit type to which you want to convert the credit.

2. Enter a conversion factor and effective dates.

   For example, $100 credit can equal 10,000 Air Miles.

3. Click **Update**.

2.27 Define Plan Elements

A plan element is part of a compensation plan. It specifies the conditions a resource must meet to be eligible for compensation, and it determines how the compensation is calculated. You can assign multiple plan elements to a compensation plan and you can assign a plan element to multiple compensation plans.

The following steps explain how to create a plan element using the Create Plan Element page. You can access this page by clicking **Create** on the Plan Elements page.

Warning: If you want to change the setup of plan elements for new periods, for example, at the beginning of a new year, be sure to end date the existing plan elements rather than deleting them. If you delete a plan element when replacing it with a new one, you will lose the old calculated and paid commission amounts that were run against the old plan element.

Warning: Do not open a new window during a browser session and navigate to the same page in the two windows simultaneously while you are creating a plan element.

Prerequisites

Create any formula, rate tables, and revenue classes that you plan to assign to the plan element first (see Section 2.11, "Define Formulas", Section 2.10, "Define Rate Tables", Section 2.22, "Define Revenue Classes").

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Element > Create

Steps

1. Enter the information about the new plan element. See Guidelines for explanation of the fields.

2. Check the Eligible for Payee Assignment box if you want to assign the payment to someone other than the resource receiving the sales credit.

   For example, this feature may be used if the credit receiver leaves the company and a new resource takes over an account. It can also be used to assign credit to a resource's company instead of to the resource directly.

3. In the Variables area, the Sum Revenue Classes box lets you choose to combine the amounts from all revenue classes assigned to the plan element to meet a target or goal. (See Guidelines.)

4. Click **Create**.

Guidelines

Target is the specific amount set for resources as their attainment amount. The most common way that a target is used in an expression is for evaluating transactions as

a percentage of quota. **Goal** is the amount that management sets as the actual goal expected of the resources. This amount is typically used for reporting purposes and is not exposed to the resources. **Fixed Amount** is a constant amount that is used for calculation purposes. Resources do not have a view or access to the fixed amount.

Target, Goal, and Fixed Amount are indicated here in the application, but are used when building calculation expressions. See the Guidelines of Section 2.32, "Customize Quota and Rates for Resources".

The Quota Group offers three choices. If you select:

- None: The plan element name does not display in the Year to Date Summary.

- Bonus: The plan element displays in the Bonus category of the Year to Date Summary.

- Quota: The plan element name displays in the Quota category of the Year to Date Summary.

The Payment Group setting is used to set how you want payments from a resource's payment plan to be allocated between plan elements. The payment group codes are customizable; the default setting is Standard. If all plan elements are set to Standard, the payment plan amounts are allocated equally. See Section 2.29.2, "Setting Up Payment Group Codes" to add group codes to the list of values.

Formulas are based on the Commission incentive type of a compensation plan. Bonus incentives, which are based on the Bonus incentive type, are additional compensation based on aggregated transactions. **Note:** On the Plan Element Create page, the Formula list of values displays only formulas that match the incentive type value selected in the Incentive Type drop-down list.

The credit type is normally the preset functional currency, but it can be any type that you define in the application.

The commonly used intervals are Period (month), Quarter, and Year. However, you can define a custom interval on the Administration tab (Administration > Incentive > Interval). After a compensation plan has been assigned to a sales role, in order to change the interval, you must remove the plan assignment, change the plan element's interval, then reassign the compensation plan.

Formula types can be Formula or External. Each formula type requires a different action:

- Formula: Select a formula from the list of values.

- External: Enter a PL/SQL package name in the Package Name field. This enables the application to find the external formula.

If you choose an external formula type, you must enter the name of the PL/SQL package in the Package Name field. If you select a formula type of Formula, be sure to select a formula with a status of Complete.

Optionally, you can identify a liability or expense account (if the application is integrated with Oracle Payable). Liability and expense accounts can be identified at the plan element level. Earnings for the plan element are assigned to the specified liability or expense account.

For plan elements used in Incentive Planning, Quota Group defaults to Quota, Interval defaults to Year, and the formula and rate table are assigned to the plan element. Plan elements in Incentive Planning do not:

- Distribute variables by period, quarter, and year

- Use external formula packages

This page supports an optional descriptive flexfield, which you can configure to your requirements. For more information on flexfields, see Appendix A.1, "Flexfields" or the *Oracle Applications Flexfields Guide.*

> **Note:** You can use an **external formula** in a plan element in this release of Oracle Incentive Compensation. External formulas are similar to system generated formulas, except that they contain customized material. This means that when you upgrade the application, any changes that were made are not automatically applied to the external formula, so they must be applied manually.
>
> To use an external formula in a plan element, select External Formula type in the Formula Type field and enter the name of the PL/SQL package in the Package Name field.
>
> To create an external formula, perform the following steps:
>
> - Start with a system generated formula that resembles your desired formula as closely as possible.
>
> - In the PL/SQL code, rename the formula, changing the name in every place it appears.
>
> - Change the formula number to Null.
>
> - Add customization as required.
>
> See Oracle MetaLink Note 284954.1 for external formula code examples.

2.27.1 Assign Revenue Classes

You must assign at least one revenue class for each plan element. See Section 2.22, "Define Revenue Classes" to create revenue classes or for more information about them.

Click Revenue Classes in the side panel menu and use the Plan Element Detail - Revenue Classes page to assign previously defined revenue classes to a plan element.

Prerequisites

Revenue classes must already be defined. Plan element details have been defined.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Element > Plan Element link > Revenue Classes

Steps

1. Query for a revenue class.

2. Assign a quota, fixed amount, and goal

3. Click **Update**.

4. On the Revenue Classes page, click **Details** to specify transaction factors and other factors that affect commission payments. See below for a detailed procedure.

2.27.2 Accelerators and Transaction Factors

In a plan element, you can modify the incentive amounts by using payment and quota accelerators, as well as transaction factors and other factors. You define the effective period for these temporary changes by assigning a Start Date and an End

Date. Accelerators increase compensation during that time period, and can be used as incentives for resources. Transaction factors stage sales credit over the life of a sale.

2.27.2.1 Accelerators

For each revenue class, at plan element level, you can define incentives known as accelerators. Oracle Incentive Compensation provides two types of accelerators:

- Payment factor: Increases the resource's commission payment without affecting the level of quota achievement

- Quota factor: Increases a resource's quota credit, that is, level of quota achievement

When you want to provide an incentive without affecting a resource's quota achievement, you can define a payment factor. The payment factor is a percentage factor multiplied against the net sales credit, resulting in compensation credit. The application then applies the compensation rate to this compensation credit to calculate the compensation. Thus, a payment factor results in a higher or lower compensation amount but no change in quota achievement.

For example, a payment factor of 200% has been put onto the revenue class of LIC-DB compensation plans for field resources to promote sales of this type of license. When Salesrep A sells something with the revenue class of LIC-DB, the application takes the transaction amount and calculates the amount of sales credit due to Salesrep A. As an example, the net sales credit is $1,000. The payment factor of 200% is multiplied against this amount to get to the total compensation amount due to Salesrep A, which is $2,000.

How the Accelerators and transaction factors are used depends on how your calculation expression is defined. For example, a common input expression that complements a percentage rate table is as follows:

EVENT_FACTOR* QUOTA_FACTOR*TRANSACTION_AMOUNT/TARGET.

A typical output expression looks like this:

Rate_ Result* TRANSACTION_AMOUNT* EVENT_FACTOR* PAYMENT_ FACTOR.

A quota factor enables a resource to reach higher levels of quota achievement more quickly, resulting in higher compensation payments. This is because Oracle Incentive Compensation uses quota achievement to determine which rate to use.

The payment factor or a quota factor is a percentage expressed as a whole number.

If there is no payment factor or quota factor, calculation defaults to 100%, which means to multiply the calculated payment amount by 1. A factor of 200% (entered as 200) means to multiply the commission amount by 200% or a factor of 2 (as in the above examples).

If you enter a value for a payment or quota factor of less than 100, Oracle Incentive Compensation reduces the incremental credit to the commission payment amount for payment factors or the current quota performance level for quota factors.

Payment factors work only when they are used in the calculation *output* expression assigned to the formula. For example:

(Rate Table Result*Transaction_Amount)*Payment_Factor

Quota factors work only when they are used by the calculation *input* expression assigned to the formula. For example:

(Transaction_Amount*Quota_Factor)/Target

Payment factors can only be used when the Apply Transaction Type is set to Individually as they apply to each individual revenue class. Payment factors have no meaning if the Apply Transaction Type is set to Group by Interval.

2.27.2.2 Transaction Factors

Transaction factors help you stage **sales credit** over the life of a sale, assigning percentages of the transaction amount to important events in the sales process, including Invoice, Order, and Payment.

Transaction factors must add up to 100%. For example, you can have 50% of the commission calculated upon order, 20% calculated at invoice value and the final 30% calculated upon payment.

Other factors are used to indicate if any activity related to a sale, such as a credit memo or order return, should be credited at a percentage other than 100%:

- Clawback: When the invoice due date grace period is exceeded, the outstanding amount of compensation credited for this sale is taken back.

- Credit Memo: A credit memo is generated when an invoice is fully or partially reversed and posted to Oracle General Ledger. Credit memos are later collected and applied against transactions.

- Deposit

- Debit Memo: A debit memo is generated to fully or partially increase an invoice. It is posted to Oracle General Ledger. Debit memos are later collected and applied against transactions.

- Giveback: If an invoice for which a clawback has been performed is subsequently paid, then a giveback is used to restore credit to a resource.

- Manual Transaction: A transaction created by a user to reverse or change sales credit.

- Payment Plan: An optional arrangement in affect for some salespeople who need to receive a minimum payment regardless of their earnings. You can specify a minimum and/or a maximum payment as well as whether any minimum payments are recoverable or not against future amounts payable.

- Payment Plan Recovery: Payment plan payments are collected from a resource after the resource has earned commission to cover the amounts.

- Order Return

- Upgrade

- Write-off

Unlike transaction factors, other factors are each calculated separately, and do not need to total 100%. Each can be over or under 100%. For example, you can set the other factor of Order Return to be credited at 80%, or clawbacks at 110% to match your business procedures.

Prerequisites
Revenue classes must already be created.

Login
Log in to Oracle HTML Applications.

Responsibility
Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation
Incentive > Element > Plan Element name link > Revenue Classes link > Details link

Steps

1. Enter start and end dates and amounts of payment and quota percentages for accelerators.

    The default is 100, which is the full amount. Entries can be above or below 100.

2. Click **Update**.

3. For transaction factors, enter numbers to indicate how you want to stage the payment of commission.

4. In the Other Factors area, assign any changes you want to make to the listed events. The default entry for each column is 100.

5. Click **Update**.

2.27.3 Assign Rate Tables

Rate tables are used to establish compensation percentage rates or fixed amounts for different performance levels. The compensation formula and plan element determine the type of information to be compared to the rate table as well as how the resulting rate is used in the calculation.

You can assign parent rate tables and also a child rate table to a plan element. See Guidelines for an explanation of how child rate tables are created and used.

Prerequisites

Rate tables must already be created (see Section 2.10, "Define Rate Tables".

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Element > Plan Element name link > Rate Tables

Steps

1. Select the rate table information.

2. You can view the commission rates by clicking **Details**.

3. You can enter a child rate table. Use the same steps as you used for the Parent Rate Table section. See example.

4. You can click the Plan Element Name link at the top to return to the Plan Element Detail page.

5. Click **Update**.

Example

Child rate tables are referenced within embedded formulas. The following example illustrates how child rate tables are used.

First, you create the formula to be embedded, and then create the formula that is referenced by the plan element, which includes the embedded formula within it. Assume that you want to calculate commissions based on percentage of quota, but only for transactions where the sales credit is greater than $1,000. First you must create an expression to determine if the sales credit is greater than $1000. The expression looks like this:

Commission.Headers.TRANSACTION_AMOUNT/1000

Use this expression as the input expression for the embedded formula. If the result is greater than 1, then you know that the sales credit is greater than $1000.

Next, configure an amount rate table with two tiers (one tier for values less than 1 and one tier for values greater than 1):

Amount	Rate
0-1	0
1-999,999,999	1

In this example, the first tier with an amount of less than 1 has a rate of 0, and in the second tier, anything greater than one has a rate of 1.

Create an output expression that references the rate table result. Select Others from the Type drop-down list and click Rate Table Result.

Next, you need to configure the embedded formula out of the input expression, rate table, and output expression you have just created. It will be referenced by the other formula.

Now you can configure the formula that will be referenced by your plan element. First, configure an expression to reference the formula that you just created. This expression looks like this:

Commission Headers.TRANSACTION_AMOUNT/SRP Period Quota.TARGET_AMOUNT*<embedded formula>.

Next, create the rate table for your formula, as follows:

Percent	Rate
0-100%	3%
100-9999%	4%

Finally, create an output expression that multiplies your rate table result by the transaction amount:

Rate Table Result*Transaction_Amount

When you build this formula, use the expressions and the rate table you have just created. Then, when you configure your plan element, reference the second formula that you created.

When you save the plan element, the rate tables associated with the formula and with the embedded formula are both associated with the plan element. When you view the rate tables associated with the plan element on the Incentive > Element > Rate Tables page, the Parent Rate Table section shows the rate table that was created for the second formula, while the Child Rate Tables section displays the rate table associated with the embedded formula. Because it is possible to create multiple embedded formulas, OIC provides a drop-down menu that enables you to select any one of the embedded formulas that you may have configured.

2.27.4 Creating a Bonus Plan Element

This is an example of creating a bonus plan element. Bonus calculation is normally based on the total commission earned by the resource or transaction total (sales credit total) of the resource. But in this case the bonus is calculated based on the commission earned by the resource.

The resource has a commission plan element with the following details:

- Input expression = Transaction Amount

- Output expression = Transaction Amount * Rate table result /100

- Rate table for the commission plan element:

Amount	Commission
0-10,000	1%
10,000-50,000	2%
50,000-100,000	3%
100,000-999999999999	4%

- Commission Plan element Interval = Period

- Apply transaction= Individually

This resource also has bonus plan element with the following details.

- Input expression = Commission_paid_ptd column from a view created based on the cn_srp_period_quotas.

- Output expression = Commission_paid_ptd of the view * Rate table Result /100

- Rate table for the bonus plan element:

Amount	Bonus
0-500	75
500-1,000	65
1,000-5,000	55
5,000-10,000	45
10,000-99999999999	25

- Bonus Plan element Interval = Period.

The resource has the following transactions:

Date	Transaction Amount
01-Jan-01	9,000

Date	Transaction Amount
02-Jan-01	15,000
01-Feb-01	40,000

Commission calculated for the above transactions using the commission plan above is:

Date	Transaction Amount	Rate	Commission
01-Jan-01	9,000	1	90
02-Jan-01	15,000	2	300
01-Feb-01	40,000	2	800

Data from the view used for bonus calculation:

Period-id	Input_achieved_ptd	Commission_paid_ptd
2001001	24,000	390
2001002	40,000	800

Bonus calculation using the bonus plan and bonus rate table

Period_id	Input_achieved_ptd	Commission_paid_ptd	Rate	Bonus
2001001	24,000	390	75	292.5
2001002	40,000	800	65	520.0

Guidelines

Use Commission_paid_ptd in the bonus input expression if your bonus is based on the commission of the resource. Use Input_achieved_ptd in the bonus input expression if your bonus is based on the total sales credit of the resource.

Here is a suggested view definition for the quarterly bonus that you can build to create the example shown previously:

```
select salesrep_id, max(a.period_id) last_period_id, sum(input_achieved_ptd)
input_achieved_ptd, sum(commission_paid_ptd) commission_paid_ptd
from cn_srp_period_quotas a
```

```
where a.period_id between 2001001 and 2001012
and b.incentive_type_code = 'COMMISSION'
group by salesrep_id, ceil((a.period_id - 2001000)/3)
```

2.28 Define Compensation Plans

When you have created all of the pieces that go into a compensation plan, such as rate tables, formulas, and plan elements, you can assemble them into a compensation plan. After you assign the plan an effective start date and end date, you can assign it to multiple sales roles.

The Compensation Plan: <plan name> page provides a consolidated view of the details of an established compensation plan. You can click the links to view more detailed information. You can sort each section on any column that has a header with an underscore.

Prerequisites

Plan elements must already be created (see Section 2.27, "Define Plan Elements"). Valid formulas, rate tables, and calculation expressions that are referenced by the plan element must exist (see Section 2.11, "Define Formulas", Section 2.10, "Define Rate Tables", and Section 2.8, "Define Calculation Expressions").

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Plan > Create

Steps

1. Enter the plan information.

2. Check the Allow Revenue Class Overlap box if you need to compensate a resource more than once for a transaction. For example, you may have a quota

type plan element as well as a bonus based on achieving revenue targets, both of which have the same revenue classes.

3. Click **Create**.

4. Click the Plan Elements link.

5. Assign the plan elements.

   If one plan element is dependent upon another, enter a sequence number in the sequence column. The plan elements are processed in ascending order of sequence numbers.

6. Click **Update**.

7. Click the **Sales Roles** link to assign the compensation plan to sales role.

8. Return to the Compensation Plan Details Page.

9. Click **Update**.

   The Validation status changes from Incomplete to Complete. If the status does not change to Complete, check error messages and fix the problem (see Guidelines).

Guidelines

A sales role cannot be assigned plans with overlapping dates. For example, if you assign a plan to a role with a start date of 01-Jan-2004 and an end date of 31-DEC-2004, you cannot assign another compensation plan that starts on 01-SEP-2004. The new plan cannot start until 01-JAN-2005.

For easy identification, define plan names by job titles or area of sales you are compensating.

You can change or restructure any aspect of a compensation plan. Because you can assign the same plan to many resources, however, be aware of how the changes you are making impact individual resources.

When you change a compensation plan, the changes propagate to the resources assigned to the plans. For customized plans, the resource receives all changes except the customized changes.

Sequencing of plan elements is important when one plan element relies on the calculation results of another. For example, with independent plan elements, the dependent plan element requires that the necessary plan element be calculated first so that the most up-to-date data is present.

When you click **Update** to save a compensation plan, it automatically checks it to verify the following:

- The plan has a name and start and end dates.

- The plan has one or more plan elements assigned with start and end dates within the plan start and end dates.

- Each plan element has a rate table with contiguous tiers and with start and end dates within the plan start and end dates.

- Each commission type plan element has at least one revenue class assigned.

- The number of dimensions in the rate table assigned to the plan element matches the number of input expressions of the formula assigned to the plan element.

- Each plan element has a rate table structure that makes sense for the plan element type.

If each of the above conditions is met, then the Validation Status field shows **Complete**. If the Validation Status field displays **Incomplete**, the plan cannot be used to calculate compensation. You must check the items shown above and fix any problems and then **Update** the compensation plan again. Do this until you receive a validation status of Complete.

This page supports an optional descriptive flexfield, which you can configure to your requirements. For more information on flexfields, see Appendix A.1, "Flexfields" or the *Oracle Applications Flexfields Guide.*

2.29 Define Payment Plans

Payment plans are an optional way to set up advance or deferred payments (sometimes referred to as draws) and to define minimum and maximum payments. Use payment plans to set rules governing how, when, and how much is paid and at what frequency.

You can set amounts paid for a minimum to be recoverable (paid back by the resource) or non-recoverable (the resource does not have to pay them back). For maximum settings, you can set whether you want to pay commission earned above the maximum to the resource at a later time.

You can set up the recovery schedule independently of the earnings for the period. For example, you can set the payment interval to Period (monthly) and the recovery schedule to Quarter.

Payment Groups enable you to set up multiple payment plans for a resource during a specific time period, as long as the payment plans are in different groups. The payment group codes are customizable; the default setting is Standard.

Prerequisites

Credit types and payment intervals are defined (see Section 2.26, "Define Credit Types" and Section 2.25, "Define Interval Types").

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Payment Plan

Steps

1. Create a new payment plan in the first blank line.

   The default payment group setting is Standard. Functional Currency is the default credit type. Period is the default payment interval.

2. Check the Recoverable box if you want the minimum amount to be recovered from later earnings.

3. Check the Pay Later box if you want any amounts over the maximum to be rolled over and paid in future periods.

4. Select a recovery interval.

   The default recovery interval setting is Period. Based on the recovery interval, the 'true-up' of payments against commissions occurs at the end of the interval assigned. See Guidelines for an example.

5. Check the Pay Against Commission box if you want the payment plan to apply its rules using earnings that have been collected during the pay period interval. If you leave the box unchecked, the application calculates recovery at the end of

the recovery interval. See Section 2.29.1, "Pay Against Commissions Check Box Example".

6. Click **Update**.

After the payment plan is created, you can assign it to a resource or a role (see Section 2.30, "Assign Payment Plans".

Recovery Example

Recovery is based on the recovery interval. For example, the Pay Against Commission box is not checked, the payment interval is Period, and the Recovery interval is Quarter. The quarters are Jan-Mar, Apr-Jun, Jul-Sep, and Oct-Dec. If a resource has a payment plan that is valid from February to May, recovery occurs in March. In June, at the end of the quarter, there is no recovery, because the payment plan is no longer in effect. The resource is paid all earnings. For more details, see Section 2.29.1, "Pay Against Commissions Check Box Example".

2.29.1 Pay Against Commissions Check Box Example

This example shows the difference between what happens if you check the Pay Against Commission box and if you don't check the box.

If you check the Pay Against Commission box, any amounts used to meet a resource's minimum or maximum payment amount are recovered at the end of each payment interval period. For example, a resource has a payment plan that has a $200 minimum and a $300 maximum per payment interval period (the period can be month, quarter, or year). The resource earns $150 commission for the payment interval period. At the end of the period, the resource is paid $200, the minimum, but owes $50 to the company if the Recoverable box is checked. The next period, the resource earns $400. In this case, the resource receives a payment of $300. If the Recoverable box is checked, $50 goes to repay the payment plan for the amount advanced to meet the minimum payment in the previous period. If the Pay Later box is checked, the resource receives the remaining $50 later. Whether the resource earns below the minimum or above the maximum, any discrepancies are resolved at the end of each payment interval period.

If you don't check the Pay Against Commissions box, any payment adjustments are made at the end of the recovery interval, which you can set to be different from the pay interval period. The pay interval period can be month, quarter, or year. The resource receives the minimum amount for each period, but can receive a higher amount, up to the maximum, during the final period of the recovery interval, when the minimum and maximum payments are trued-up against the commissions earned.

Two scenarios can occur at the end of the recovery period: the resource has earned less than the minimum or more than the maximum. These scenarios are explained below. For these examples, the Pay Against Commission box is unchecked, the Pay Interval Period is Period, the Recovery Interval is Quarter, the Minimum payment per period is $200 and the maximum is $300. The transactions used in the example are displayed in the following table.

Table 2–2   Pay Against Commission Example

Month	Earnings	Payment Plan	Payment Plan Recovery	Total Payment
Jan-03	$180	$200	NA	$200
Feb-03	210	200	NA	200
Mar-03	150	60	-400	200
Apr-03	1000	200	NA	200
May-03	0	200	NA	200
Jun-03	1000	-1,240	-460	300
Jul-03	1000	200	NA	200

For January and February, the resource earns a little less and a little more than the $200 minimum, and receives the minimum payment of $200. No recovery occurs until March, when the resource receives the minimum $200 payment, and the payment plan advances $60 to cover the difference between the $600 paid out and the $540 of total commissions earned. Because the Recoverable box is checked, this $60 due from the resource is carried over to the second quarter. If the Recoverable box was not checked, no amount would carry over.

During the second quarter, the resource earns commissions above the maximum in April and June but no commissions in May. The payment plan pays out the minimum of $200 for April and May. When recovery occurs in June, the payment plan pays the maximum of $300 to the resource because earnings for the quarter were above the minimum of $600. The payment plan recovery takes back $200 for April and $200 for May, plus the $60 remaining from the first quarter, for a total of $460. The Payment Plan column amount of -1,240 represents the resource's second quarter total earnings ($2,000) less the amount of payments ($700), less the $60 that is recovered from the first quarter. If the Pay Later box is checked, the $1,240 is paid out later to the resource.

July starts a new quarter, so it is treated exactly the same as April.

2.29.2 Setting Up Payment Group Codes

The Payment Group setting enables you to assign multiple payment plans to a resource as long as they are in different payment groups for a specific date range. The payment group codes are lookups and are customizable; the default setting is Standard.

Because the calculation of payment plans amounts is always done at the payment group code level, if payment recoveries are not waived for the current period, the earnings used for payment plan calculation will take the commissions, bonus, manual payments, and payment recoveries that have the same payment group code as that of the plan element with the payment plan. This affects the amount that is shown in the Worksheet Total field on the resource's payment worksheet (Worksheet: <resource name>.

Login

Log in to Oracle Forms.

Responsibility

Incentive Compensation Developer

Navigation

Navigator > Lookups

Steps

1. Query the Lookup Type PAYMENT_GROUP_CODE.

2. Create the lookups you need.

3. Save.

4. Bounce the HTML server.

For more details on Lookups, see Appendix B, "Lookups".

2.30 Assign Payment Plans

Payment plans are used to set up advance or deferred payments and to define minimum and maximum payments. They are optional.

You can assign payment plans at the role level, so that all of the resources to whom the role is assigned receive the same payment plan at the same time. Or, you can assign payment plans at the resource level. If large numbers of resources were

assigned payment plans, the second method could take a long time and introduce the possibility of human error during the data entry process.

You must decide which method of assigning payment plans works best for your organization. However, even if you decide to assign payment plans in mass at the role level, you can still assign and modify payment plans for individual resources as needed.

You can lock a payment plan assignment at the resource level to prevent it from being deleted if the payment plan assignment is changed subsequently at the role level.

2.30.1 Assigning a Payment Plan to a Role

For speed and efficiency, you can assign a payment plan to a role. The resources who are assigned the role receive the payment plan automatically. A payment plan is assigned to the sales role with specific dates.

You can customize the payment plan for an individual resource for settings such as minimums, maximums, and start and end dates.

You can assign a payment plan to a role in two different ways. The first way uses the Payment Plans page (Administration > Incentive > Payment Plan). This is also the place where payment plans are created, so this way is convenient for assigning a newly created payment plan to a role without having to navigate to another tab. The second way uses the Role page (Resource > Role > Payment Plan).

2.30.1.1 Using the Administration Tab

Prerequisites

The payment plan must already be defined (see Section 2.29, "Define Payment Plans").

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Payment Plan

Steps

1. Select the payment plan that you want to assign to the role.

2. Scroll to the right and click the **Details** link.

3. Select the Role Assignments view and click **Apply**.

4. Enter the role information and click **Update**.

2.30.1.2 Using the Resource Tab

You can assign a payment plan to a role on the Resource tab.

Prerequisites

The payment plan must already be defined (see Section 2.29, "Define Payment Plans").

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Resource > Role

Steps

1. Query for a role.

2. In the side panel menu, click **Payment Plan**.

3. Enter the role information and click **Update**.

2.30.2 Assigning a Payment Plan to a Resource

You can assign a payment plan to a resource.

Prerequisites

The payment plan must be defined (See Section 2.29, "Define Payment Plans").

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager

Navigation

Resource > Resources

Steps

1. Query for a resource.

2. Click the Payment Plans link.

3. Select a payment plan, and enter the information.

4. You can customize the dates and the minimum or maximum amounts for the individual resource.

5. Click **Update**.

2.31 Assign Pay Groups

A **pay group** defines the length of eligibility and frequency of payments, such as monthly or semi-monthly, for the resources who are assigned to the pay group. A resource must be assigned to a pay group to receive compensation.

You can assign a pay group to a role or to an individual resource. If you assign a pay group to a role, every resource who is assigned the role receives that pay group automatically.

2.31.1 Assigning a Pay Group to a Role

You can assign a pay group to a role. Resources inherit the pay group when the role is assigned to them. After the pay group is assigned to the role, you can customize the pay group for individual resources, for example, changing the start and end dates. For an individual resource, you can lock a customized pay group to prevent it from being changed if the pay group for the role is in mass.

The steps for assigning a pay group to a role differ from those for assigning a pay group individually to a resource.

You can assign a pay group to a role in two different ways. The first way uses the Pay Group page (Administration > Incentive > Pay Group). This is also the place where pay groups are created, so this way is convenient for assigning a newly created pay group to a role without having to navigate to another tab. The second way uses the Role page (Resource > Role > Pay Group).

A role cannot have more than one pay group assigned at a time.

2.31.1.1 Using the Administration Tab

Prerequisites
The pay group must already be defined.

Login
Log in to Oracle HTML Applications.

Responsibility
Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation
Administration > Incentive > Pay Group

Steps

1. Query for a pay group, or click **Apply** to view all pay groups.

2. Scroll to the right and click the **Details** link next to the pay group you want to assign.

3. Select a view of Role Assignments and click **Apply.**

4. Select a role and enter start date and end dates.

5. Click **Update**.

Guidelines

You must enter a valid start date and end date for the assignment of a pay group to a role. An error message displays if the dates are not valid. A role cannot have more than one pay group assigned at a time.

In order to preserve the pay group assignment for a resource when their role is deleted from a pay group assignment, a Lock box has been added to the Assign Pay Groups page (Resource > Resources > Pay Groups). This feature can be used to prevent individual resources assigned to a pay group from leaving their pay group, even if the other resources assigned to a role are assigned to a new pay group. The Lock box also prevents manual updates to the resource's pay group.

2.31.1.2 Using the Resource Tab

You can also assign a pay group to a role on the Resource tab.

Prerequisites

The pay group must be defined (see Section 2.17, "Define Pay Groups").

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Resource > Role

Steps

1. Query for a role.

2. Click the **Pay Group** link.

3. On the first blank line, select a pay group and enter start and end dates.

4. Click **Update**.

2.31.2 Assigning a Pay Group to a Resource

Assigning a pay group to a role can be very efficient, but sometimes you want to assign a pay group individually to a resource, or customize a pay group that was assigned to the resource's role.

Prerequisites

The pay group must be defined (see Section 2.17, "Define Pay Groups").

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager

Navigation

Resource > Resources

Steps

1. Query for a resource.

1. Click the Pay Groups link.

2. Select a pay group name and enter start and end dates.

3. Click **Update**.

Guidelines

A resource can be assigned multiple pay groups, but only one pay group can be active at a time.

Pay groups can be assigned to multiple resources at the same time and you can start and end pay group assignments by individual resource at any time within the duration of the pay group.

When you assign a pay group to a resource, the application automatically checks to see if there are any conflicts between the start and end dates of the pay group and the start and end dates for every resource to which the pay group has been assigned. For example, if you define a pay group starting Jan 1 and ending on Mar 31 and you have assigned it to a resource, the application will not let you change the end date for the pay group assignment beyond Mar 31.

Pay group assignment is necessary for a resource to be paid, and is also required in order for the compensation plan that is assigned to the role to appear when you query for the compensation plan assignment using the Resource tab.

2.32 Customize Quota and Rates for Resources

Sometimes, you want to make changes to the plan elements of a compensation plan for a specific resource. Changes you can make include:

- Assigning and distributing variables (Target, Performance Goal, and Fixed Amount). See Guidelines.

- Assigning payees

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager

Navigation

Resource > Resources

Steps

1. Query for a resource.

2. Click Compensation Plan in the side panel menu.

3. Select the resource's role name and click **Apply**.

4. In the Compensation Plan area, click the Name link to display the plan elements.

5. Check the box in the **Customized Flag column** next to the plan element that you want to customize for the resource.

   If you check the box, the contents of the customized plan element are retained even if you make to the plan element at the role level.

6. Click the plan element Quota Name link**.**

7. Add or revise variables for the resource. See Guidelines.

8. Click **Distribute** to distribute the variables.

9. You can view the distribution by Period, Quarter, and Year.

   Regardless of the view, variables are distributed equally to each period.

10. Click **Apply**.

11. To complete the distribution, click **Distribute Target**.

    The amounts are equally distributed to each period, duplicating the amount set in the Variables area of the Resource Details - Plan Element Details page.

12. To perform payee assignment, enter a payee name and dates.

    A payee is a resource different from the resource whose name is on the transaction; it can also be the company for which the other resource works.

13. Click **Update**.

14. If you want to customize the commission rates on a rate table for a resource, click the Rate Tables link on the side panel menu. **Note**: Make sure the Customized Flag box is checked on the Compensation Plans page (see step 6 above).

15. Click the Details Link.

16. Make changes to the commission rates as needed.

17. Click **Update**.

Guidelines

Target is the specific amount set for resources as their attainment amount. Resources have views of this figure through their contract. To access the target amount when creating expressions for a formula, you must add the amount from the TARGET column of the CN_QUOTAS table. If a plan element for a resource is customized, then you must use the TARGET column from the CN_SRP_QUOTA_ASSIGNS table instead.

The most common way that a target is used in an expression is for evaluating transactions as a percentage of quota. The expression typically looks like this:

TRANSACTION_AMOUNT/TARGET

This expression gives you the percentage of quota a particular transaction yields.

Goal is the amount that management sets as the actual goal expected of the resources. This amount is typically used for reporting purposes and is not exposed to the resources. To access this amount when creating expressions, use the PERFORMANCE_GOAL column from the CN_QUOTAS or CN_SRP_QUOTA_ASSIGNS table.

Fixed Amount is a constant amount that is used for calculation purposes. It is normally used in output expressions to calculate commission. Resources do not have a view or access to the fixed amount. To access the fixed amount when creating expressions, use the PAYMENT_AMOUNT column from the CN_QUOTAS or CN_SRP_QUOTA_ASSIGNS table.

By entering the achievement levels at the plan element level, you create a generic plan. All resources assigned the compensation plan receive this quota figure.

The Sum Amounts from Revenue Classes box is read only at the resource level. You can check or uncheck this box at the plan element level.

2.33 Verify the Implementation

Verification of the implementation can be done by confirming the minimum setups required to activate the Oracle Incentive Compensation application and allow users to begin entering setups and data.

2.33.1 Verify Profile Options

Login
Log in to Oracle Forms.

Responsibility
System Administrator

Navigation
(Forms) Profile > System

Steps
1. Check the Site box.

2. Enter a profile of **OSC:%**

3. Click **Find.**

4. See Appendix C, "System Profile Options" for a complete listing of system profiles.

   Not all Oracle Incentive Compensation profiles begin with OSC:.

Guidelines
If custom responsibilities are being created for use with Planning modules of Oracle Incentive Compensation, be sure to set the profile option 'OSC: SFP Responsibility Group' at the appropriate responsibility level.

It is recommended that all debug and log file profile options be inactive during regular operation. Activating these options generally incurs performance overhead due to the recording of debug and log information. A common cause of unexpected performance drops is the unknown or forgotten activation of such options. These are the debug, logging profile options:

- OSC: Debug Mode

- OSC: Log File

- OSC: Mark Events

- OSC: Salesforce Planning Debug Mode

2.33.2 Verify System Parameters

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Parameters

Steps

See Section 2.3, "System Parameters".

Guidelines

The status change to ACTIVE after the first accumulation period is changed from 'Never Opened'. If the System Parameters Status is INACTIVE, users may be able to access application pages, but not utilize most of the functions.

2.33.3 Verify GL Calendar: Period Types

Use this page to verify your accounting period types.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Navigation

Administration > General > Calendar Type

Steps

See Period Type (in Setup Chapter) of the *Oracle General Ledger User Guide* for this procedure.

Example

Period Type	Periods Per Year	Year Type
Month	12	Calendar
Quarter	4	Fiscal
Year	1	Fiscal
Month	12	Fiscal

2.33.4 Verify Accumulation Periods

Verify the accounting periods in your calendar and provide detailed information for each of these periods. Select the Period Status, Forecast and Freeze settings. Use the Accumulation Periods page to open and close accounting periods in your Incentive Compensation calendar only.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Accumulation Period

Example

Name	Year	Qrtr	Start Date	End Date	Period Status	Forecast	Freeze
Jun-04	2005	1	01-Jun-2004	30-Jun-2004	Future-Entry	Checked	Unchecked
Jul-04	2005	1	01-Jul-2004	30-Jul-2004	Future-Entry	Checked	Unchecked

Name	Year	Qrtr	Start Date	End Date	Period Status	Forecast	Freeze
Aug-04	2005	1	01-Aug-2004	30-Aug-2004	Future-Entry	Checked	Unchecked
Sep-04	2005	2	01-Sep-2004	30-Sep-2004	Future-Entry	Checked	Unchecked
Oct-04	2005	2	01-Oct-2004	30-Oct-2004	Future-Entry	Checked	Unchecked
Nov-04	2005	2	01-Nov-2004	30-Nov-2004	Future-Entry	Checked	Unchecked
Dec-04	2005	3	01-Dec-2004	30-Dec-2004	Future-Entry	Checked	Unchecked
Jan-05	2005	3	01-Jan-2005	30-Jan-2005	Future-Entry	Checked	Unchecked
Feb-05	2005	3	01-Feb-2005	30-Feb-2005	Future-Entry	Checked	Unchecked
Mar-05	2005	4	01-Mar-2005	30-Mar-2005	Future-Entry	Checked	Unchecked
Apr-05	2005	4	01-Apr-2005	30-Apr-2005	Future-Entry	Checked	Unchecked
May-05	2005	4	01-May-2005	30-May-2005	Future-Entry	Checked	Unchecked

Guidelines

A Period Status of Future-Entry allows creation of setup information within these periods, such as classification rules, compensation plans, and revenue class hierarchies. Loading of transactions and calculations is not allowed until the Period Status is set to Opened.

See: Section 2.5, "Open Accumulation Periods".

2.33.5 Verify Interval Numbers

Use this procedure to verify Interval Numbers. Note in the examples below how the interval numbers vary depending on whether they are set by Period, Quarter, or Year. If they are by Period, each interval number is unique. If they are set by quarter, the number is the same for each period in a given quarter. If the interval numbers are set by year, they are the same for all periods in the year.

See Section 2.25, "Define Interval Types".

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Interval Types

Steps

1. Check the interval numbers.

2. Click the Quarter link.

3. Click the Year link.

2.33.6 Verify User Name Assignment to Tables

Verify the user names for tables depending on desired usage.

See Section 2.6, "Define Tables".

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Tables

Example

Schema	Name	User Name	Alias	Description	Usage
CN	CN_COMMISSION_ HEADERS	CN_COMMISSION_ HEADERS	CH	NA	Calculation
CN	CN_COMMISSION_ LINES	CN_COMMISSION_ LINES	CL	NA	Calculation

Schema	Name	User Name	Alias	Description	Usage
CN	CN_SRP_PERIOD_ QUOTAS	CN_SRP_PERIOD_ QUOTAS	CSPQ	NA	Calculation
CN	CN_SRP_QUOTA_ ASSIGNS	CN_SRP_QUOTA_ ASSIGNS	CSQA	NA	Calculation

2.33.7 Verify Table Column Settings

Verify the column settings for tables.

See Section 2.6.1, "Define Columns".

Logon
Log in to Oracle HTML Applications

Responsibility
Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation
Administration > Incentive > Tables >Columns

2.33.8 Verify Report Configuration

See: *Oracle Incentive Compensation User Guide* Section 11.5 Configuring Reports.

Changes are not visible to the user until after the Middle Tier is bounced. These settings apply to the basic report definition, so changing the visible columns in a report alters the report for any execution within the given database instance, regardless of the organization from which the report is run. This is important during a multi-org implementation; all organizations must agree on the column layouts prior to modification.

3

Implementing Incentive Planning

Perform the following tasks to implement the Incentive Planning functionality in Oracle Incentive Compensation:

- Section 3.1, "Associate Responsibilities with Responsibility Groups"

- Section 3.2, "Define Default Contract Text and Other Settings"

- Section 3.3, "Define User Access"

- Section 3.4, "Define Quota Components"

- Section 3.5, "Define Attainment Schedule"

- Section 3.6, "Define an Agreement"

- Section 3.7, "Define Agreement Details"

- Section 3.8, "Associate Jobs with Roles"

- Section 3.9, "Assign Job Titles to Roles"

- Section 3.10, "Assign Job Titles to Resources"

- Section 3.11, "Customize Anchors"

- Section 3.12, "Assign and Distribute Quotas to Resources"

Table 3–1 Setup Steps for Incentive Planning

Step		Description	Forms or HTML	Responsibility
1.	Associate Responsibilities with Responsibility Groups	Optional. Assign access privileges to responsibilities in Incentive Planning.	Forms	System Administrator
2.	Define Default Contract Text and other Settings	Optional. Customize and define the text that accompanies a compensation plan. Also, define workday calendar.	HTML	IC Super User, IC Analyst, IP Analyst
3.	Define User Access	Optional. Define the groups to which an Incentive Planning Finance Manager has access.	HTML	IC Super User
4.	Define Quota Components	Optional. Define the parts used to create agreements in Incentive Planning.	HTML	IC Super User, IC Analyst, IP Analyst
5.	Define Attainment Schedule	Optional. Set up attainment schedules, which calculate earnings for different levels of quota attainment.	HTML	IC Super User, IC Analyst, IP Analyst
6.	Define an Agreement	Set up how the agreement is going to work and which role is going to receive it.	HTML	IC Super User, IP Analyst
7.	Define Agreement Details	Complete the definition of the rate table and quota anchor details for a sales role.	HTML	IC Super User, IP Analyst
8.	Associate Jobs with Roles	Optional. Performed in Resource Manager.	Forms	System Administrator
9.	Assign Job Titles to Roles	Optional. Assign job titles used in Incentive Planning to a role for a given date range.	HTML	IC Super User, IC Analyst, IP Analyst

Table 3–1   Setup Steps for Incentive Planning

Step		Description	Forms or HTML	Responsibility
10.	Assign Job Titles to Resources	Optional. Performed in Resource Manager.	Forms	System Administrator
11.	Customize Anchors	Optional. Customize these parts of the role definition for individual resources.	HTML	IC Super User, IP Analyst, IP Contract Approver, IP Finance Manager, IP Sales Manager
12.	Assign and Distribute Quotas to Resources	Optional. Assign and distribute quotas to resources.	HTML	IC Super User, IP Analyst

3.1 Associate Responsibilities with Responsibility Groups

In Incentive Planning, an analyst creates agreements and a contract approver approves them. Some activities can be performed by multiple responsibilities. Because of their different job functions, users with one responsibility may see different tabs than those with another responsibility when they log in to the application.

Some Incentive Planning responsibilities are seeded within the application, such as Incentive Planning Analyst, Incentive Planning Contract Approver, and Incentive Planning Manager. However, you can create your own responsibilities to meet your business requirements. For example, you can create US Planning Analyst, Europe Planning Analyst, and Australia Planning Analyst, all with the same job function.

Whether the responsibilities are seeded or created by you, Oracle Incentive Compensation uses responsibility groups to assign access privileges to them. These groups determine which groups and resources the person assigned to the responsibility can work on. The five available responsibility groups are Super User, Finance Manager, Contract Approver, Sales Manager, and Sales Force Incentive Compensation User. All seeded responsibilities are already placed in appropriate responsibility groups during installation of the application, but any new responsibility that you create for use in Incentive Planning must be assigned a responsibility group.

This can be done by setting the OSC: SFP Responsibility Group profile for the responsibility. A typical responsibility group setup is displayed below:

Responsibility	Responsibility Group
Incentive Planning Analyst	Super User
Incentive Planning Finance Manager	Finance Manager
Incentive Planning Contract Approver	Contract Approver
Incentive Planning Sales Manager	Sales Manager
Sales Force Incentive Compensation User	Sales Force Incentive Compensation User

Login
Log in to Oracle Forms.

Responsibility
System Administrator

Navigation
Profile > System

Steps
1. Enter OSC%Resp% in the Profile field.

2. Check the Responsibility box.

3. Enter Incentive in the Responsibility field. Click **Find**.

4. Select Incentive Planning Analyst. Click **OK**.

5. In the Responsibility column, in the row for OSC:SFP Responsibility Group, select the access for the Super User responsibility from the list of values. Click **OK**.

6. Repeat these steps for each of the other responsibilities, as shown in the table above.

7. Save.

3.2 Define Default Contract Text and Other Settings

In order to set up Incentive Planning, you need to define a calendar, as well as laying out the default text that appears on any contracts created in Incentive

Planning for this operating unit. First, you set up the workday calendar, and then use it when you define the contract text.

3.2.1 Set up a Workday Calendar

The workday calendar is a type of transaction calendar that is assigned to a compensation plan. The value of a transaction calendar is that it defines the specific workdays of a particular year, and excludes weekends and holidays. For example, a USA Workday Calendar 2005 lists only the workdays in the United States for the calendar year 2005. The holidays vary from country to country, from state to state and even from organization to organization. For example, July 4th is a holiday in the United States but is not in the United Kingdom.

Workday calendars are useful for calculating compensation based on the exact number of workdays in a given month. For example, if you hire a new resource starting in the middle of a month, if there is no workday calendar in place, the employee is paid commission for the entire month. With a workday calendar set up, the employee is paid only for the actual salesrep workdays in that month.

A calendar's duration can be defined to match your organization's fiscal year. You need to assign a new workday calendar every year as the dates of weekends and many holidays change from year to year.

Prerequisites

The profile option OSC: Use Work Day Calendar must be set to Yes. See Appendix C.1, "System Profile Options".

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > General > Transaction Calendar

Steps

1. Enter the name of the new calendar in the first empty name field.

2. Check the boxes for the days of the week that you want to designate as workdays in the transaction calendar.

3. Click **Update**.

4. To define the exact dates of holidays or additional work days, click the transaction calendar link in the Subject column.

5. Check the box next to any date that you want to set as a business day.

6. Uncheck the box next to any date that you want to designate as a holiday.

7. Click **Update**.

Guidelines

The days of the week selected for a transaction calendar cannot be changed after it has been saved.

For steps 4 through 6, the Transaction Calendar page does not start at the current year, and the listing of dates is extensive. In the current release, dates begin at January 1, 1994 and run through December 31, 2010. To get to the beginning of the year you want, search by entering %<year>%, for example, %2003%, in the Date field and clicking Search.

Note: You can create a transaction calendar in the HTML version of the application, but to delete one, you must go to Forms and log in as the GL Super User (Setup > Financials > Calendars > Transaction).

3.2.2 Define Default Contract Text

Text from the Default Contract Text for the organization is carried over to the agreement contract text. The text can be customized at the Agreement level as follows:

- Display names for quota components

- Display names for rate tables

- Selection of displayed components for an attainment schedule

- Unique text for title, terms and conditions, club eligibility

Optionally, you can set up a workday calendar, which defines exactly which days of the year are workdays for your business. The workday calendar's duration can be

defined to match your organization's financial year. A workday calendar allows you to pay commission only for the exact days a resource works.

Prerequisites

If you plan to use a Workday Calendar, you must set the OSC: Use Work Day Calendar profile option to Yes. No is the default setting. See Appendix C.1, "System Profile Options".

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Settings

Steps

1. Select a Transaction calendar.

2. Enter information in the fields as needed.

3. Click **Update**.

Guidelines

The text in the Terms & Conditions text box can be made to refer to the location of the Terms & Conditions. Example, "I accept the Terms & Conditions as set out in the Company Handbook that is posted on the Notice Board or the Company Handbook that was issued with the Employment Contract." This text will appear at the bottom of the Compensation Plan that is generated later. The Approver's details will appear at the bottom of the Compensation Plan as well.

The Terms & Conditions text box can also contain hyperlinks to other text.

Contract text is limited to 2000 characters.

3.3 Define User Access

For Incentive Planning, groups of resources are set up in Resource Manager with a usage of Salesforce Planning. In order for an Incentive Planning Finance Manager to view or modify sales data for members of a group, the access must be explicitly defined. You can give someone with Incentive Planning Finance Manager responsibility access to data and can also assign the level of access: Update or View. Users with the Update access level can make changes in the data. Users with a View access level can only review it.

Prerequisites

Users must be assigned Incentive Planning Financial Manager responsibility to appear on the User Access screen.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Navigation

Administration > Incentive > User Access

Steps

1. Click a name link to open the User Access Detail page.

2. Enter a compensation group in the Compensation Group column.

   Only groups with a usage of Sales Force Planning can be selected.

3. Select an organization.

   An organization is a business unit of your company.

4. Select an access level of Update or View.

   Only users with an access level of Update can make changes to the data.

5. Click **Update**.

3.4 Define Quota Components

Components are parts of an agreement created in Incentive Planning. Components must be created before they can be used in Incentive Planning.

Components are either fixed or variable. Fixed pay components correspond to fixed payouts, such as salary, which are the same for each pay period and are not based on quota attainment or revenue achievement. Payouts from variable pay components change depending on sales activity and are associated with commission.

Variable pay components can be based on a quota or be non quota based. Non quota based components have a commission payout that is not dependent upon quota attainment. For example, a non quota based component can be assigned that pays 5% on all items sold.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Component

Steps

1. To view existing components, use the search parameters and click **Apply**.

2. To create a new component, click **Apply**.

3. Enter a name, type and unit type (see Guidelines).

4. Check the Computed Flag box if the value of the component is to be derived from variable pay, non computed components using a computation.

    See Section 3.4.1, "Edit Computed Component Formula".

5. Click **Apply**.

6. Click **Update**.

Guidelines

Unit and Revenue, selected in the Unit column, indicate if compensation is revenue based or unit based. Revenue can be used during currency conversion, but unit based components are not currency converted as they are point based. Because Fixed components can be of revenue type only, the unit type of Revenue is not displayed as a drop-down list.

See the Oracle Incentive Compensation User Guide, section 3.2.4, for a scenario of defining quota components.

3.4.1 Edit Computed Component Formula

When a computed component has been defined and assigned to an agreement, it requires inputs so that its value can be calculated. The valid inputs are variable pay non-computed components and other variable pay computed components that have already been defined. A percentage value is assigned to each input. Use this page to define a formula for a computed formula.

Prerequisites

Components must be created (see previous section).

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Agreement

Steps

1. Click the name link of an agreement.

2. Click the Edit hyperlink in the Variable Pay, Computed Components section.

3. Enter a percentage against each component until all variables of the formula have been defined.

4. Click **Save**.

Guidelines

The percentages entered against each component selected are multiplied with the value of each component. You can use any percentages that you like. The results of all multiplication are added together. Any changes you make appear in the Variable Pay, Computed Components section of the Sales Role Detail page.

3.5 Define Attainment Schedule

An attainment schedule is used in the Compensation Contract to display earnings for each level of quota attainment for quota based variable components. If quota based variable components are not used in an agreement, this step can be skipped, because an attainment table does not appear in the contract. After you define an attainment schedule, you can reuse it in multiple agreements.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Attainment

Steps

1. Enter the name of the new attainment schedule in the blank line at the bottom of the Attainment Schedule Summary and click **Update**.

2. Click the new name in the Attainment Schedule Summary.

3. Enter percentages of each achievement level you want to define in the attainment schedule.

If you need more than two fields, click **Update** and two more blank fields appear under the saved ones.

4. Repeat until your attainment schedule is complete.

5. Click **Update**.

Guidelines

To make changes to an existing attainment schedule, click the link in the Attainment Schedule Summary.

To delete an attainment schedule, check the Remove box and click **Update**. You cannot delete an attainment schedule that is already assigned to a role. To change the name of an attainment schedule, create a new schedule with the same percentages, assign it to the role, and remove the old schedule.

3.5.1 Seasonality Schedules

Seasonality schedules show how a product/service income or cost/expense is distributed throughout the year, expressed in percentages of the year's total. Seasonality schedules can be assigned to multiple agreements, and agreements can use multiple seasonality schedules for different components. Because of the variability from period to period, a new hire's quotas and pay are affected. If seasonality schedules are not assigned, an even distribution is assumed by default, where each period's quota is the same amount for the entire year.

Seasonality schedules make it possible to weight a quota. For example, if a resource works for only the last six months of the fiscal year, with the default seasonality of even distribution each month, the amounts for the variable non computed elements in their compensation plan are exactly half the annual total for the sales role. If, however, seasonality weighted the last two months of the fiscal year with a larger quota, the annual amount of variable non computed compensation is more than 50 percent of a full year's total.

Seasonality schedules can only be applied only to variable pay, non computed components. They are applied on the Sales Role Detail page (Incentive > Agreement > Sales Role Detail).

See the *Oracle Incentive Compensation User Guide*, Chapter 3, for an example.

Navigation

Administration > Incentive > Seasonality

Steps

1. Click **Create**.

1. Enter new seasonality schedule information and click **Update**.

2. In the Seasonality area, enter the percentage of annual quota in each field next to each month. Be sure that the percentages add up to 100 percent.

3. Click **Update**.

4. Click **Validate** to verify that your percentages add up to 100 percent. If validation is successful, then the Validation Status in the top area of the page reads *Valid*.

Guidelines

You must click Update to save a new seasonality schedule *before* clicking Validate. If you click Validate without clicking Update first, it will return the percentage entries to 0.

3.6 Define an Agreement

In Incentive Planning, you must set up how the agreement is going to work and which role is going to receive it. Steps include:

- Setting up quota minimums and maximums

- Deciding whether to use rounding

- Picking the agreement level in the Incentive Planning hierarchy

- Selecting an attainment schedule

- Indicating whether the role is entitled to club participation

Then, the process of selecting components begins, from the fixed pay components such as salary to variable components, which may or may not have a quota. If anchors are used, they must be defined.

Prerequisites

Sales Roles must already be created in Oracle Resource Manager. Rate tables, components, and attainment schedules must already be created.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Navigation

Incentive > Agreement

Steps

1. Query a sales role name. Click the sales role to go to the Sales Role Detail page.

2. The On Target Earning field, which is read-only, displays the Total Earnings if the resource assigned this role achieves 100% of quota. It is derived from information entered in the Fixed Pay Amount and Commission at 100% Attainment fields on this page.

3. Use a rounding factor if you want to round the assigned quota.

    For example, input 1000 if you want the assigned quota to be rounded up to the nearest 1000. **Note**: Rounding factor must be base 10 (10, 100, 1000, and so on.)

4. Enter the range of quota figures for the role (see Guidelines).

5. Enter the Plan Level to indicate the position of the role in the sales hierarchy (see Guidelines).

6. Select an Attainment Schedule.

7. Check the Club Eligible box if this role is entitled to Club participation on achieving Club rules.

8. Select Fixed Pay Components and amounts for each.

    Sequence numbers indicate the order that the components appear in the Assign Quota and My Quota Estimate windows.

9. Select Variable Pay, Non Computed Components and enter information for them.

    The % of Total Quota is the percentage of the quota that you want this component to represent in the compensation plan. The default seasonality schedule is even. Only formulas that are cumulative and have the planning box checked appear in the list of values.

10. Select a rate calculation method (see Guidelines).

11. Select Variable Pay Computed Components and enter information for them.

12. Select Variable Pay Non Quota Components and enter information for them.

    Rate tables can have no more than one dimension.

13. In the Map to Compensation Plan field, enter the name of the compensation plan, along with dates, to create a compensation plan with that name during activation.

14. Click **Update**.

Guidelines

Entering the Quota minimum and maximum enables the Quota Range Report to be run. The minimum quota on the Sales Role Details window is picked up on the Minimum Quota field on the Quota Modeling window when the minimum function is invoked by the user (Distribution).

Compensation Plan Levels are used in the Quota Model Summary and Average Quota Summary Reports where the quota for each Component are totaled for each level of resources in the Salespeople Hierarchy for the selected parameters (example, Organization, Effective Date) of each Report. As an example of plan level, a street level resource is assigned to Level 1. See the *Oracle Incentive Compensation User Guide,* Chapter 11 for more information.

The Attainment Schedule is used in the Compensation Contract where earnings for each level of achievement are displayed.

Oracle Incentive Compensation automatically accounts for seasonality when it calculates prorated annual quotas.

These are the rate calculation methods:

- Anchors - Anchors are used to customize the minimum or maximum that can be earned at each tier of the rate table you selected. When you select this method, an Anchors link appears in the Details column. See Section 3.7, "Define Agreement Details" for more information.

- Manual - The rates are directly defined without anchors.

- Single Rate - The rate table has only one tier, and the rate is determined by dividing On Target Earnings by Quota.

3.7 Define Agreement Details

If you are using the anchors rate calculation method for a computed component, you must complete the definition of the rate table and quota anchor details for a sales role.

Prerequisites

Rate tables must be created and assigned to the component to which you want to apply anchor values.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Navigation

Incentive > Agreement > Sales Role Detail

Steps

1. In the Variable Pay, Computed Components area, click **Anchors** in the Details column.

2. Select a calculation method, Line or Step, from the Anchor Rate Calculation Method drop-down list (See the example that follows).

3. Enter the Minimum Rate and Maximum Rate for each tier of the Rate Table.

4. In the Multi-Tier Rate Table Anchors area, enter the Percent of Attainment in the first column. This is displayed based on the rate dimension definition. You can change only the first and last values in this column (See the example following).

5. In the Anchor Type column, select the method of commission calculation to be used. Choose Amount if you are entering the commission earnings amount for each attainment/achievement level. If you want to use the percentage of quota, select Percent in the Anchor Type column and enter the percentage of quota for each attainment level. See the following example for more explanation.

6. Click **Update**.

Example of Two Methods of Anchor Rate Calculation

There are two methods of Anchor Rate calculation, Line and Step. These methods are used to fill in the Commission rates for the rate tables created when you activate an agreement and push the plan into the Commission module of Oracle Incentive Compensation.

Step calculation simply uses the amounts in the anchor (expected commission column), with no calculation. When attainment reaches the percent in the tier, the commission amount shown in the tier is paid. The Line method calculates commission on a sliding scale, with commission depending on the exact rate in each separate tier of the rate table, calculated on a sliding scale.

Here is an example of how Line and Step calculation works:

Step 1. Create a rate dimension in the administration part of Oracle Incentive Compensation:

Attainment
0-25%
25-50%
50-75%
75-100%
100-999%

Step 2. Assign the rate dimension to a rate table. Here the dimension type is percent and the rate type is amount. The rate dimension table supplies the structure of the rate table. The actual commission rates are generated by the application when the amounts for a specific resource are added:

From	To	Expected Commission
0	25%	calculated by application
25%	50%	calculated by application
50%	75%	calculated by application
75%	100%	calculated by application
100%	999%	calculated by application

Step 3. Assign this rate table to a component in Incentive Planning and define the anchors as follows:

% of Attainment	Type	Expected Commission
0%	Amount	0

% of Attainment	Type	Expected Commission
25%	Amount	100,000
50%	Amount	150,000
75%	Amount	180,000
100%	Amount	200,000
999%	Amount	200,000

Step 4. If the anchor method calculation is Step calculation, the commission rates for the rate table are:

From	To	Commission Rate
0	25%	0
25%	50%	100,000
50%	75%	150,000
75%	100%	180,000
100%	999%	200,000

Step 5. If the anchor calculation method is Line calculation, commission rates for the rate table will be calculated as follows (TQ = 20,000 total quota):

- 1st Tier (0 - 25%)

  100,000 - 0/(25% - 0%) TQ

  100,000/25% * 20,000 = 20

- 2nd Tier (25% - 50%)

  (150,000 - 100,000)/50% - 25%) TQ

  50,000/25%*TQ = 10

- 3rd Tier (50% - 75%)

  (180,000 - 150,000)/(75% - 50%) TQ

  30,000/25% *TQ = 6

- 4th Tier (75% - 100%)

  (200,000 - 180,000)/(100% - 75%) TQ

20,000/25% *TQ = 4

■ 5th Tier (100% - 999%)

(200,000 - 200,000)/(999% - 100%) TQ = 0

Note: Real data will be set up so that the commission rates increase from tier to tier.

Step calculation can be used only for rate table type of amount.

Anchors are used only to calculate the commission rates for the rate table. After activation from Incentive Planning to Administration, these rates can be seen in Resource > Resources, which are customized rates for the specific resource.

If the step calculation method is used in Incentive Planning, the rate table in step 4 will be used to calculation commission. If the line calculation method is used, then the rate table in step 5 will be used to calculation commission.

In step 3 above, if the rate dimension for a rate table is defined as:

Attainment
0-25%
25-50%
50-100%

Then when this rate table is assigned to a compensation plan in Incentive Planning, the multi-tier rate table percent of attainment column is displayed as:

Attainment
0%
25%
50%
100%

You can change only the 0% and 100% values.

3.8 Associate Jobs with Roles

In Incentive Planning, Roles are associated with jobs in Human Resources. This procedure must be performed in Resource Manager before you can assign job titles in Oracle Incentive Compensation.

Prerequisites

None

Login

Log in to Oracle Forms.

Responsibility

CRM Administrator or Resource Manager

Navigation

Resource Manager > Setup > Roles

Steps

1. Create a new or query an existing role with a type of Sales Compensation.

2. Associate a Human Resources Job to the role by entering or querying for it in the Jobs section of the form.

3. Save.

3.9 Assign Job Titles to Roles

Job titles created in Human Resources. Roles that are used in Incentive Planning must be assigned to these Job titles. This makes it easier to keep track of multiple roles that use the same job title. It is also important for quota modeling purposes.

For example, a job title of Sales Consultant in Human Resources could have multiple roles attached to it in Incentive Compensation. The different roles could be defined by product line, country, level of responsibility, or any other factor.

Prerequisites

Job titles must be defined in Human Resources.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Job Titles

Steps

1. Query for a job title.

   The Resource Details - Job Titles page appears. The page displays any roles that are already assigned to the Job Title and Job Code.

2. Associate a new role to the Job Title Code and Job Code by entering it in the Role field.

3. Enter a start date for the role. An end date is optional.

4. Click **Update**.

Guidelines

If you are using Oracle Human Resources, the job title information here is read from that application using Oracle Resource Manager. If you are not using Oracle Human Resources, please refer to Oracle Resource Manager section of the *Oracle Common Application Components User's Guide* for information on how to define resources.

3.10 Assign Job Titles to Resources

This procedure is performed in Resource Manager. See Section 1.1.1, "Oracle Resource Manager".

3.11 Customize Anchors

Anchors are used in Incentive Planning to indicate the maximum that can be earned at each tier of a selected rate table. Anchors are part of the definition of sales role

details in Oracle Incentive Compensation, and can be customized for individual resources.

Prerequisites

The sales role must already be created in Resource Manager. The sales role details must already be created. Rate tables must be created and assigned to the component to which you want to apply anchor values.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager

Navigation

Resource > Planning

Steps

1. Query for a resource.

2. Click the link in the On Target Earnings column.

3. Click **Anchor** in the Details column in the Variable, Quota Based area.

4. Enter the commission rate range for each tier of the Rate Table.

5. In the Quota Anchors Detail section, select Amount if entering the commission earnings amount for each attainment/achievement level. For Percentages, select percentage and enter the percentage for each attainment level (percentage of quota). See Example.

6. To view rate tables for variable non-quota elements, click the Rate link in the Details column of the Variable, Non-Quota area.

7. Click **Update**.

Example

In the example below, at 0% achievement of quota, the variable pay is zero. At 25% of quota, the additional variable pay is 5,000. At 50% of quota achievement, the additional variable pay is increased to a maximum of 12,000. This means that the earnings in the 25-50% tier of the rate table are compensated at a higher percentage than the 0-25% tier. At the 100% level of quota achievement, the additional variable pay is 20,000. Any achievements over 200% of quota are capped by entering the same value as the previous tier (no additional variable pay) against the highest rate tier.

Anchor	Type	Pay
0	Amount	0
25	Amount	5,000
50	Amount	12,000
100	Amount	20,000
200	Amount	50,000
9999	Amount	50,000

3.12 Assign and Distribute Quotas to Resources

3.12.1 Email Alert Messages

Email alert messages are a method to prompt the email receiver to perform an action. For example, when sales managers click the distribute button, their directs receive an email that prompts them to view and accept their compensation plan. Use Oracle Workflow Builder to edit the email alert messages as needed.

Steps

1. Start Oracle Workflow Builder and connect to the database by entering its name, user login ID and password.

2. In the Show Items Types window, select Compensation Plan Processing in the Hidden panel. Transfer Compensation Plan Processing to the panel called Visible by clicking the Visible button. Click OK.

3. In the Oracle Workflow Builder main window, expand the tree to view the approval process points that are represented by nodes. Expand the messages node. There are three messages for the sales force to view:

- Accept Compensation Plan

- Approve Compensation Plan

- Distribute Compensation Plan

4. Select one of the messages for editing. For example, select Accept Compensation Plan.

5. In the Navigator Control Properties window, select the Body tab.

6. Edit the standard text message to suit user requirements.

7. Save.

Guidelines

Workflow Attributes are commands to fetch actual values. Example, &FORWARD_FROM_NAME in the Body tab will enable the name of a user with Contract Approver responsibility to appear in the email alert. The Workflow Attributes can be identified as they are text expressed in capital letters and preceded by &. You should edit message text around these Attributes and not to edit the Attributes themselves.

3.12.2 Workflow Background Process

The Workflow background engine process needs to be scheduled so that the workflow notification process can run (refer to Workflow User Guide > Setup Steps > Setting Up Background Workflow Engines). To enable the notification process, the Workflow Background Process concurrent program must be submitted from the Submit Request form.

In the parameters window, enter the following parameters:

Item Type: Choose Compensation Plan

Processing:

Minimum Threshold: Ignore this field

Maximum Threshold: Ignore this field

Process Deferred: Choose Yes

Process Timeout: Choose Yes.

Schedule this concurrent program to run at regular intervals. For example, if notifications are required to be delivered every half hour, then set the schedule at

30-minute intervals and the workflow background process will activate every 30 minutes and process any unprocessed items.

3.12.3 Notification Mailer

For email notifications to be sent, submit the Notification Mailer concurrent program as a concurrent process or from the command line. Before this, the notification mailer configuration file wfmail.cfg that is provided as a part of Oracle Workflow will need to be modified for your installation. See the *Workflow User Guide* for details on how to do this.

4

Implementing Sales Credit Allocation

Sales Credit Allocation is designed to automate the credit allocation process by systematically applying a set of consistent rules. This minimizes errors, thereby reducing the time analysts must spend reconciling them.

To use Sales Credit Allocation, refer to *Oracle Incentive Compensation User Guide*, Chapter 12, Sales Credit Allocation.

Sales Credit Allocation setup requires the steps in this chapter.

4.1 Set up Profile Options

During credit allocation processing, the credit rules engine checks to see if the total output revenue allocation percentage is equal to 100%. If the total revenue allocation percentage is not equal to 100%, then the status of the transaction is updated to REV NOT 100.

The value set in the following system profile determines how the application handles transactions in which the total revenue allocation percentage is not equal to 100%.

There are three options:

- **Even Distribution**: The remaining revenue percentage is distributed evenly among the existing sales roles.

- **Weighted Average**: The remaining revenue percentage is distributed based on the weighted average.

- **Custom**: You can add custom code if none of the seeded choices suits your business requirements. You can use the Custom option to set up for the Workflow process to not process the transaction.

If you do not set the value at the application level, it defaults to the site level. If no selection is made, the Workflow process fails.

The following table includes the following columns from left to right:

- **Profile Name**: Name of the profile.

- **Description**: Explains what the profile does.

- **Level**: Level at which this profile option can be set. A = Application, S = Site, R = Responsibility, U = User.

- **Default**: Lists the seeded default for the profile, if any.

Profile Name	Description	Level	Default
Total Rev % is Not 100	In Sales Credit Allocation, Revenue Split Total is not 100%.	AS	Custom

To make changes to this profile option, see Appendix C, "System Profile Options".

4.2 Set up New Transaction Sources

The seeded transaction sources for sales credit allocation in this release are Oracle Incentive Compensation and Oracle Quoting. You can also set up a custom user defined source by adding it to the CN_LOOKUPS table in the Forms application. To add values to the CN_LOOKUPS table See Appendix B, "Lookups".

Guidelines

The Transaction Source name must be unique. It cannot be the name of an existing transaction source or an existing credit rule name.

If you delete a transaction source, you cannot view or access any rule associated with it.

4.3 Map Source Tables to Transaction Source

In order to use the Sales Credit Allocation engine, you must map the tables that contain the transactions to the tables in a transaction source. If the transaction source is Oracle Incentive Compensation, this mapping information is used to generate a dynamic PL/SQL package. This package is picked up when you transfer transactions to the Sales Credit Allocation Rules Engine.

In this release, Oracle Incentive Compensation and Oracle Quoting are the only seeded selections.

To create credit rules and run Sales Credit Allocation, see the *Oracle Incentive Compensation User Guide*, Chapter 12.

Prerequisites

Transaction sources that are not seeded must be added to the CN_LOOKUPS table.

Login

Log in to HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Source Table Mapping

Steps

1. To add a new attribute, enter a name in the User Name column next to the first available destination name (for example, ATTRIBUTE51).

2. Enter a value set name if an attribute has been assigned a valueset.

   See Valueset documentation for more information.

3. Select a data type: Alphanumeric, Date, or Numeric. See Guidelines.

4. If the transaction source is Oracle Incentive Compensation, select a source.

5. To set up the rule attribute for use by a credit rule condition, check the Enable box.

6. Click **Update**.

7. If you are using Oracle Incentive Compensation as a transaction source, click **Generate**.

   This generates the PL/SQL code.

Guidelines

The data type of the credit rule attribute must match the data type of the transaction attribute column value or rules engine processing will fail. For example, if the data type in the rule attribute is Numeric, the credit rule condition is Between 100,000 and 200,000, and the transaction attribute value is ABC, the rules engine will reject the transaction, because ABC is not numeric data.

4.4 Set up Workflow Options

During credit allocation processing, the credit rules engine checks whether the total output revenue allocation percentage is equal to 100%. If the total revenue allocation percentage is not equal to 100%, then the status of the transaction is updated to REV NOT 100.

These transactions are processed by Workflow based on a system profile value. You can set how you want to handle transactions that are not able to be processed normally.

There are three options provided with the Sales Credit Allocation module.

- **Even Distribution**: The remaining revenue percentage is distributed evenly among the existing sales roles.

- **Weighted Average**: The remaining revenue percentage is distributed based on the weighted average, which uses the percentages assigned to each role.

- **Custom**: Even Distribution and Weighted Average contain built-in logic, but the Custom setting does not. You can add custom code if none of the seeded choices suits your business requirements. You can also use the Custom option to set up for the Workflow process to not process any transactions when the allocation percentage is not equal to 100%.

For example, the allocation percentages for a transaction are 60% to Role 1, 20% to Role 2, and 20% to Role 3. However, during transaction processing, only two roles are associated with the credit rule. What is to become of the remaining 20%?

Using Even Distribution, each of the two roles receives 10% credit, or half of the remaining 20% credit. Using the Weighted Average, The first role gets 15% and the second receives 5% of the sales credit, because 60% represents three times the 20% of the second role. Each of the resources assigned to the roles that resulted in revenue output receives additional credit.

The option is set in the system profile *Total Rev % Not 100*. If you do not set the value at the application level, it defaults to the site level. If no selection is made, the

Workflow process fails. See Appendix C, "System Profile Options" for steps to set up this profile.

You can use Workflow configuration to decide what should happen after Rules Engine processing is complete. If you have a PL/SQL package that copies the transactions from output interface tables to your own schema, you can configure the workflow process to perform this task.

For Oracle Incentive Compensation, Sales Credit Allocation runs as a batch using a concurrent program in the background. This is because of the large volume of transactions that are normally processed in this application, which requires the use of tables. For Oracle Quoting, the Sales Credit Allocation engine runs as an online process, because it needs to process a small amount of information to deliver information to a resource quickly. In this case, Sales Credit Allocation simply applies a rule to a transaction and returns the credit allocation percentages.

4.5 Set Up Workflow Background Process

In order for Workflow to run for the processes in section 4.4, you must set up the background process for it. This setup schedules when Workflow checks the queue.

For Sales Credit Allocation, it is recommended that you set up the Workflow background process parameters to run periodically. You should set up start and end dates which encompass the full span of time for which you want the process to run.

After the setup is complete, you can log in to Self Service Web Applications (SSWA) to view the Workflow Administrator Activities List. See Section 4.5.2, "View Workflow Background Process Results".

4.5.1 Set Up the Process

To set up the Workflow background process and view Workflow activity, perform the following steps.

Prerequisites
None

Login
Log in to Oracle Forms.

Responsibility

System Administrator

Navigation

Requests > Find Requests

Steps

1. On the Find Requests screen, select All My Requests, and Order By Request ID.

2. Click **Submit a New Request**.

3. Select Single Request and click **OK**.

4. In the Parameters screen, select an item type of Sales Credit Allocation Process. Click **OK**.

5. On the Schedule screen, select Periodically, and enter start and end dates.

   The dates should encompass the time span for which you want to run the background process. A year is a good standard span.

6. Set the process to run periodically and to apply the interval from the start of the prior run.

7. Click **OK**.

4.5.2 View Workflow Background Process Results

To view the results of the Workflow background process, log in to Self Service Web Applications.

1. Select Workflow Administrator Web Applications from the Self Service list.

2. Click **Find Processes**.

3. On the Find Processes screen, you can select which activities to view. If you select the Any Status button, active and complete Workflow activities will be displayed. You can select Active or Complete to limit the display.

4. Select All from the Item Type drop-down list.

5. You can further narrow the Find process by entering information in the four fields that follow:

   - Item Key
   - User Key

- Process Name

- Process Owner

6. You can limit the displayed activities by selecting Suspended or In Error, or select Any Status to show all activities that match the parameters previously set.

7. Click **Find**.

8. In the Item Type field, select Sales Credit Allocation Process.

9. Click **Find**.

10. To view details about a process, click the link in the Process Name field.

11. Click **View Diagram** to see the Activities List queue.

4.6 Set up Personalization Links

You can personalize OA pages to make them work better for your enterprise. Personalization is useful for:

- Hiding or showing a field

- Changing the prompt for a field or other text

- Reordering fields or items

- Adding new buttons, links, text items, or images

- Restricting query results in a table

- Restricting data that a user can access

Before you can personalize an OA page, you must set up personalization links. See the *Oracle Applications Framework Developers Guide* or the *OA Framework Personalization and Extensibility Guide* for more specific information.

4.7 Create Credit Rule Hierarchy

Use the credit rule hierarchy to maintain and link credit rules in a logical way. Create the necessary rule hierarchy for each transaction that implements Sales Credit Allocation business logic.

A credit rule definition consists of the following:

- Name

- Description

- Date Effectivity

- Rank

- Parent Rule

- Transaction Source

Credit Rule Conditions are used to determine whether a credit rule should be used or not. Each credit rule has the following definition:

- Attributes

  * Source Transaction Column Name

  * User Defined Column Name

  * Data Type

  * Value Set

  * Transaction Source

- Operator

- Values

Allocation percentages indicate how much revenue credit and non revenue credit is given to each sales resource associated with a role.

- Revenue

- Non Revenue

- Split or not split

- Effective dates

4.8 Synchronize the Credit Rules

Any time you make changes to one or more rules, you must synchronize the rules in the Credit Rule hierarchy. This procedure ensures that when transactions are sent to the Credit Rules Engine they are processed based on the most recent rule conditions. For example, changes to the rank of a rule, or the allocation percentage of a rule must be up to date to deliver the desired results.

Prerequisites

The Transaction Source must be mapped. The Credit Rule hierarchy must be created.

Login

Log in to HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Navigation

Requests > Allocation Process > Submit Request

Steps

1. Select **Synchronize Credit Rules** from the Request Type drop-down list.

2. Select the transaction source from the Transaction Source drop-down list.

3. Click **Submit Request,** and click **OK** to proceed with the credit rule synchronization.

4. The process information at the bottom of the page displays a Phase of *Pending*. Click **Refresh Data** periodically until the Phase displays *Completed*.

5. You can click the Process Log icon to see the Process Log.

4.9 Matching Credit Rule Attributes to Data Types

The data type of the credit rule attribute must match the data type of the transaction attribute column value or rules engine processing will fail. For example, if the data type in the rule attribute is Numeric, the credit rule condition is Between 100,000 and 200,000, and the transaction attribute value is ABC, the rules engine will reject the transaction, because ABC is not numeric data.

Because the rules engine processes transactions in bulk, the log does not list the specific transactions that caused the failure.

A

Flexfields

A.1 Flexfields

Flexfields are used in Oracle Incentive Compensation for classification of transactions, in defining plan elements, and in setting up compensation plans. They are all optional. Use a flexfield when you want to set up a additional input field on a page that is preset with a recognizable name and a specific set of values from which to select. For example, a field can be called Item Number, and be set up with particular values that you enter in Oracle Forms. The built-in flexfields allow a small amount of custom formatting of a page without programming.

Oracle Incentive Compensation uses descriptive flexfields, which provide customizable expansion space on a page. There are three flexfields used in this release of Oracle Incentive Compensation.

Flexfields	Code
CN Commission Headers	CN_COMMISSION_HEADERS_ALL
CN Compensation Plans	CN_COMP_PLANS_ALL
CN Quotas	CN_QUOTAS_ALL

The flexfields are enabled in three tables:

- CN Commission Headers

    Oracle Incentive Compensation contains 100 numbered attributes that can be customized for use with classification of transactions. These attributes are seeded with the application.

- CN Compensation Plans

Oracle Incentive Compensation contains 15 numbered attributes that can be customized for use with defining compensation plans. These attributes are seeded with the application. This flexfield appears on the Compensation Plan Details page.

- CN Quotas

    Oracle Incentive Compensation contains 15 numbered attributes that can be customized for use with defining plan elements. These attributes are seeded with the application. This flexfield appears on the Plan Element Details page.

When you display the context fields in the HTML application, the standard display is as Context Value. The field names can be customized by logging into the Oracle Forms as an Application Developer and using the Descriptive Flexfield Segments screen (Flexfield > Descriptive > Segments). Or, you can eliminate the fields by not checking the Displayed box. You can make the flexfield a required value. See the *Oracle Applications Flexfields Guide* for information about setting up flexfields.

B

Lookups

B.1 Lookups

Lookups enable quick selection from drop-down menus. Oracle Incentive Compensation has 100 lookups incorporated into its system to speed the process of entering data into forms. The lookups listed in the following table display the user name in the left column; the Type name is shown in full caps in the right column with the default selections below it. You can add lookups and add values to the default lists.

B.1.1 Viewing Lookups

To view existing lookups, perform the following procedure.

Prerequisites
Log in as the Incentive Compensation Developer responsibility in the Forms version of the application.

Login
Log in to Oracle Forms

Navigation
Navigator > Lookups

Steps
1. Query for Oracle Sales Compensation.
2. Enter Oracle Sales Compensation in the Application field.
3. In the Toolbar, click **View**.

4. Press Control and the F11 key.

   The first lookup appears.

5. Scroll through the lookups by using the up and down arrow keys or use Find in the View drop-down menu. Leave the cursor in the Type field while scrolling.

   The Oracle Sales Compensation Lookups window displays the lookups individually as they are currently configured.

B.1.2 Editing a Lookup

Most lookups that come with Oracle Incentive Compensation when you install it are editable to suit your business requirements. To edit or add values to a lookup, perform the following:

Steps

1. Perform steps 1 to 5 above.

2. For edits, click in the field you want to change and enter new data.

3. To add values, click the field in the first blank line of the table and enter the appropriate data.

4. The From column automatically populates with the current date and the Enabled box is automatically selected. Change these as needed.

5. Save.

B.1.3 Creating a Lookup

To create a new lookup, perform the following:

Steps

1. In the Navigator - Incentive Compensation Developer window, double-click **Lookups**.

2. Select Oracle Incentive Compensation from the Application field.

3. Enter a name, user name, and description.

   Enter the name using all caps with underscores between words.

4. In the table in the lower part of the window, enter one or more values that you want to use in the lookup. Enter a code, meaning, and description that are easy for users to understand.

5. Enter effective dates.

6. Check the Enable box if you want the lookup to be operational within the effective date range.

7. Save.

Guidelines

Note: Under the type of PE_OBJECT_TYPE in the table below, the codes START_ PERIOD_ID and END_PERIOD_ID are listed. However, starting with the 11i release of Oracle Incentive Compensation, these period_ids are no longer used. Use actual start and end dates instead.

B.1.4 List of Lookups

The following table lists Oracle Incentive Compensation Lookups, including a description, Access Level, and Seeded Values and Meanings.

Lookup Type	Description	Lookup Code and Meaning
ACCESS_CODE	Access Code	UPDATE (Update)
		VIEW (View)
ACTIVATE_STATUS	Plan Activate Status	CREATED (Created)
		FAILED (Failed)
		PUSHED (Activated)
		UPDATED (Updated)
ADJUSTMENT_REASON	Manual Adjustment Reason	AR_ERROR (Accounts Receivable Processing Error)
		OE_ERROR (Error During Order Entry)
		OTHER (Other)
		SHARED (Commission should be Split)
ADJUSTMENT_STATUS	Manual Adjustment Status	CANCELED (Canceled)
		POSTED (Posted)
		REVERSED (Reversed)
		REVIEW (Review)
		TRIAL (Trial)

Lookup Type	Description	Lookup Code and Meaning
ADJUST_STATUS	Transaction Adjust Status	DEALASGN (Deal Move)
		DEALSPLIT (Deal Split)
		FROZEN (Frozen)
		INVLOAD (Invoice Captured)
		MANUAL (Manual)
		MASSADJ (Move Credits)
		MASSASGN (Share Credits)
		ORIGINAL (Original)
		REVERSAL (Reversal)
		SPLIT (Splits)
ADVANCED SEARCH	Advanced Search	ADJUSTED_BY (Adjusted By)
		ADJUST_DATE (Adjust Date)
		ADJUST_STATUS_DISP (Adjust Status)
		DIRECT_SALESREP_NAME (Direct Salesperson Name)
		DIRECT_SALESREP_NUMBER (Direct Salesperson Number)
		INVOICE_DATE (Invoice Date)
		INVOICE_NUMBER (Invoice Number)
		LOAD_STATUS (Load Status)
		ORDER_DATE (Order Date)
		ORDER_NUMBER (Order Number)
		PROCESSED_DATE (Processed Date)
		QUANTITY (Quantity)
		REVENUE_TYPE_DISP (Revenue Type)
		ROLLUP_DATE (Roll Up Date)
		STATUS_DISP (Calculation Status)
		TRANSACTION_AMOUNT (Functional Amount)
		TRX_TYPE_DISP (Transaction Type)
AMS_CUSTOM_SET_OBJECTS	Parent Object for Cue Cards	PLAN_ELEMENT (Plan Element)

Lookup Type	Description	Lookup Code and Meaning
AMS_CUSTOM_SETUP_OBJECTS	Parent Object for Cue Cards	PLAN_ELEMENT (Plan Element) ROLE (Role)
AMS_SYS_ARC_QUALIFIER	AMS System Architecture Qualifier: Cue Card Codes and Meanings	PE_ARC (Revenue Classes) PE_ART (Rate Tables) PE_DTLS (Main) RO_CP (Compensation Plan) RO_PG (Pay Group) RO_PMT (Payment Plan)
ANALYST_NOTE_REASON	Analyst Note Reason	SYSTEM_GENERATED (System Generated) USER_DEFINED (User Defined)
ANC_CALC_METHOD	Anchor Calc Method	LINE_CALC (Line Calculation) STEP_CALC (Step Calculation)
APPL_STATUS	Applicable Status	NA (Not Applicable)
APPLICATION_TYPE	Application Type	AR (Oracle Receivables) CN (Oracle Commissions) and Sales Analysis GL (Oracle General Ledger) OE (Oracle Order Entry) RA (Oracle Revenue Accounting)
APPROVE_REJECT	Approve Reject	APPROVE (Approve) REJECT (Reject)
ASSIGN_TYPE_CODE	Assign Type	RESASGN (Resource Assignment) ROLEASGN (Role Assignment)
BASE_RULE	Base Rule	BASE_RULE (Base Rule)
BATCH_STATUS	Batch Status	POSTED (Posted) UNPOSTED (Unposted)
CALCULATION_STATUS	Calculation Status	COMPLETED (Completed) FAILED (Failed) INCOMPLETE (Incomplete) PROCESSING (In Progress)

Lookup Type	Description	Lookup Code and Meaning
CALCULATION_TYPE	Types of Calculation	BONUS (Bonus)
		COMMISSION (Commission)
CALC_SUBMISSION_OBJECT_TYPE	Calculation Submission Object	CALC_TYPE (Calculation Type)
		CONCURRENT_FLAG (Concurrent Calculation)
		EMPLOYEE_NUMBER (Employee Number)
		EMPLOYEE_TYPE (Employee Type)
		END_DATE (End Date)
		HIERARCHY_FLAG (Entire Hierarchy)
		INTELLIGENT_FLAG (Do incremental calculation or not)
		INTERVAL_TYPE (Interval Type)
		NAME (Calculation Submission Batch Name)
		RESPONSIBILITY_NAME (Application responsibility name)
		SALESREP_OPTION (Resources)
		START_DATE (Start Date)
		USER_NAME (Application User Name)
CLASSIFICATION_DATATYPE	Classification Datatype	ALPN (Alpha Numeric)
		DATE (Date)
		NUMB (Numeric)
CLASSIFICATION_STATUS	Classification Status	CLS (Classified)
		NEVER (Never Classified)
		XCLS (Failed Classification)
CN_HEAD_TRX	Header Transaction Status	CALC (Calculated)
		OBSOLETE (Obsoleted)
		POP (Populated)
		ROLL (Rolled Up)
		XCALC (Failed Calculation)
		XPOP (Failed Population)

Lookup Type	Description	Lookup Code and Meaning
CN_LEVEL_NUMBER	Level Number for Executive Portal Report	0 (Self with No Levels) 1 (One Level Down) 2 (Two Levels Down) 3 (Three Levels Down) 4 (Four Levels Down) 5 (Five Levels Down)
CN_NOTES	Notes	NOTES (Notes)
CN_OPERAND	Incentive Compensation Operand	0 (AND) 1 (OR)
CN_OPERATOR	Incentive Compensation Operator	0 (AND) 1 (OR)
CN_PAY_GROUP_DTLS_TYPE_CODE	Lookup code for Pay Group Details Display by	PERIODS (Periods) SALESPEOPLE (Resources)
CN_PROMPTS	Prompt Texts used in UI interface	DIMENSION_NAME (Dimension Name) EXP_NAME (Expression Name) FORMULA_NAME (Formula Name) RATE_TABLE_NAME (Rate Table Name)
CN_R2P_CLUB_ELIG	Club Eligibility Flag	Y (Yes) N (No)
CN_RULE_CREATE_TYPE	Rule Create Type	ROOT (Root) CHILD (Child) SIB (Sibling)
CN_SEARCH_CATEGORIES	Sales Compensation Search Categories	JOBTITLE (Job Title) ROLE (Role) SALESREP (Resource) QUOTA (Quota)
CN_USAGE_FLAG	Incentive Compensation Usage Flag	C (Collection) Y (Calculation)

Lookup Type	Description	Lookup Code and Meaning
COLLECTION_TYPE	Collection Type	CN_COLLECT_CLAWBACK (Clawbacks)
		CN_COLLECT_CUSTOM (Collect Custom Transaction Source)
		CN_COLLECT_INVOICES (Collect Invoices)
		CN_COLLECT_ORDERS (Collect Orders)
		CN_COLLECT_PAYMENTS (Collect Payments)
		CN_COLLECT_WRITEOFFS (Collect Writeoffs)
		CN_COLLECT_RAM (Collect Revenue Adjustments)
COLUMN_TYPE	Column Type	CF (Commissions Factor)
		CN (User Defined)
		EF (Event Factor)
		IN (System)
		PF (Payment Factor)
CP_OBJECT_TYPE	Compensation Plan Objects	CP_NAME (Compensation Plan Name)
		DESC (Description)
		END_PERIOD (End Period)
		REV_CLS_OVERLAP (Allow Revenue Class Overlap)
		START_DATE (Start Date)
		START_PERIOD (Start Period)
		STATUS_CODE (Status Code)
CP_PHASE_CODE	Concurrent Request Phase Code	C (Completed)
		I (Inactive)
		P (Pending)
		R (Running)

Lookup Type	Description	Lookup Code and Meaning
CP_STATUS _CODE	Concurrent Request Status Code	A (Waiting)
		B (Resuming)
		C (Normal)
		D (Cancelled)
		E (Error)
		G (Warning)
		H (On Hold)
		I (@Normal)
		M (No Manager)
		P (Scheduled)
		Q (Standby)
		R (@@Normal)
		S (Suspended)
		T (Terminating)
		U (Disabled)
		W (Paused)
		X (Terminated)
		Z (@Waiting)
CURRENCY_TYPE	Currency Type used in reports	FUNCTIONAL_CURRENCY (Functional Currency)
		SALESREP_CURRENCY (Resource Currency)
DATA_TYPE	Column Datatypes	DATE (Date)
		LONG (Long)
		NUMBER (Number)
		VARCHAR2 (Varchar2)
DELIMITER_TYPE	Delimiter Type	COMMA (Comma)
		QUOTE (Single Quotation)
		DOUBLEQ (Double Quotation)
		SEMICOL (Semi-colon)
		SPACE (Space)
		TAB (Tab)

Lookup Type	Description	Lookup Code and Meaning
DISCOUNT_OPTION	Discount Option	NONE (Not apply discount percentage)
		PAYMENT (Apply to payment factor)
		QUOTA (Apply to quota factor)
DISTINGUISHED_ HIERARCHIES	Distinguished Hierarchies	REVENUE_CLASS (Revenue Class Rollup)
		SALESREP (Sales Representative Rollup)
DISTRIBUTE_METHOD	Method for distributing quota	EQUAL (Equal)
		EVEN (Even)
		MIN (Minimum)
DYNAMIC_PROMPT	Period Processing Status Dynamic Prompt	DISTRIBUTE_DRAW (Distribute Draw)
		DISTRIBUTE_TARGET (Distribute Target)
		DRAW (Draw)
		PAYMENT (Payment)
		PERIOD_DRAW (Period Draw)
		PERIOD_TARGETS (Period Targets)
		TARGET (Targets)
ELEMENT_TYPE	Element Type	-1000 (Recoverable Payment)
		-1001 (Nonrecoverable Payment)
ENCLOSED_TYPE	Enclosed Type	COMMA (Comma)
		QUOTE (Single Quotation)
		DOUBLEQ (Double Quotation)
		SEMICOL (Semicolon)

Lookup Type	Description	Lookup Code and Meaning
EVENT_NAME	Event Name	CHANGE_CLS_HIER (Change a hierarchy used in classification)
		CHANGE_CLS_HIER_DATE (Change a hierarchy date used in classification)
		CHANGE_CLS_HIER_DELETE (Delete a hierarchy interval used in classification)
		CHANGE_CLS_HIER_PERIOD (Change a hierarchy interval used in classification)
		CHANGE_CLS_RULES(Change classification rules)
		CHANGE_CLS_RULES_ATTR (Change classification rules attribute)
		CHANGE_CLS_RULES_DATE (Change classification ruleset date range)
		CHANGE_CLS_RULES_HIER (Change classification rules hierarchy)
		CHANGE_CLS_RULES_REV (Change classification rules revenue class)
		CHANGE_CLS_RULES_SET (Change classification rules set
		CHANGE_COMP_PLAN (Change compensation plan)
		CHANGE_COMP_PLAN_OVER_LAP_ FLAG (Change compensation plan overlap flag)
		CHANGE_COMP_PLAN_PERIOD (Change compensation plan effective interval)
		CHANGE_CP_ADD_MGR (Add a manager to a compensation group)
		CHANGE_CP_ADD_SRP (Add a salesperson to a compensation group)

Lookup Type	Description	Lookup Code and Meaning
EVENT NAME (continued)	Event Name	CHANGE_CP_DELETE_MGR (Delete a manager from a compensation group)
		CHANGE_CP_DELETE_SRP (Delete a salesperson from a compensation group)
		CHANGE_CP_HIER_ADD (Add an edge to compensation group hierarchy)
		CHANGE_CP_HIER_DATE (Change date range of a compensation group hierarchy edge)
		CHANGE_CP_HIER_DELETE (Delete an edge from a compensation group hierarchy)
		CHANGE_CP_MGR_DATE (Change date range of a manager)
		CHANGE_CP_SRP_DATE (Change date range of a salesperson)
		CHANGE_DELETE_TRX (Delete transactions)
		CHANGE_FORMULA (Change a formula)
		CHANGE_INSERT_TRX (Insert new transactions)
		CHANGE_PERIOD_INTERVAL_ NUMBER (Change a period's interval number)
		CHANGE_PLAN_ASSIGN (Change plan assignment
		CHANGE_PLAN_ASSIGN_INS_DEL (Insert or delete plan assignment)
		CHANGE_PLAN_ASSIGN_PERIOD (Change plan assignment effective interval)
		CHANGE_QUOTA_CALC (Change plan element)

Lookup Type	Description	Lookup Code and Meaning
EVENT_NAME (continued)	Event Name	CHANGE_QUOTA_DATE (Change plan element date range)
		CHANGE_QUOTA_PERIOD (Change plan element effective interval)
		CHANGE_QUOTA_POP (Change plan element revenue class factors)
		CHANGE_QUOTA_ROLL (Change plan element revenue class)
		CHANGE_QUOTA_UPLIFT_DATE (Change -plan element uplift factors date range
		CHANGE_RC_HIER_DATE (Change revenue class hierarchy date range)
		CHANGE_RC_HIER_DELETE (Delete revenue class hierarchy effective interval)
		CHANGE_RC_HIER_PERIOD (Change revenue class hierarchy effective interval)
		CHANGE_RT_INS_DEL (Insert or delete rate tiers)
		CHANGE_RT_RATES (Change rate table rates)
		CHANGE_RT_TIERS (Change rate table tiers)
		CHANGE_SRP_HIER (Change salesperson hierarchy)
		CHANGE_SRP_HIER_DELETE (Delete salesperson hierarchy effective interval)
		CHANGE_SRP_HIER_PERIOD (Change salesperson hierarchy effective interval)
		CHANGE_SRP_PAY_GROUP (Change salesperson pay group)
		CHANGE_SRP_PAY_GROUP_DATE (Change salesperson's pay group date)
		CHANGE_SRP_QUOTA_CALC (Change salesperson's plan element setting)

Lookup Type	Description	Lookup Code and Meaning
EVENT_NAME (continued)	Event Name	CHANGE_SRP_QUOTA_PAYEE_DATE (Change date range of payee assignment)
		CHANGE_SRP_QUOTA_POP (Change salesperson's uplift factors or payee assignment)
		CHANGE_SRP_ROLE_PLAN (Change role/plan or role/salesperson assignment)
		CHANGE_SRP_ROLE_PLAN_DATE (Change date range of role/plan/salesperson assignment
		CHANGE_SYS_PARA_RC (Change revenue class hierarchy used)
		CHANGE_SYS_PARA_SRP (Change salesperson hierarchy and roll up flag)
		CHANGE_TEAM_ADD_REP (Add a salesperson to a team)
		CHANGE_TEAM_DEL_REP (Delete a salesperson from a team)
		CHANGE_UPDATE_TRX (Update transactions)
EXPRESSION_MESSAGES	Messages Required for Rule Attribute Expressions	AND (And)
		BET (Between)
		GT (Greater than)
		IIH (Is in Hierarchy)
		IS (Is)
		LT (Less than)
		NOT (Not)
		OR (Or)
		RES (Result)
		WV (With Value)

Lookup Type	Description	Lookup Code and Meaning
EXPRESSION_TYPE	Expression Type	EXPRESSIONS (Expressions)
		EXTERNAL_ELEMENTS (External Elements)
		FORECAST_AMOUNT (Forecast Amount)
		FORMULAS (Formulas)
		GROUP_FUNCTIONS (Group Functions)
		NUMBER_FUNCTIONS (Number Functions)
		OSC_ELEMENTS (Sales Compensation Elements)
		OTHERS (Others)
		PLAN_ELTS (Plan_Elements)
		RATE_TABLE_RESULT (Rate Table Result)
		SQL_FUNCTIONS (SQL Functions)
EXTERNAL_TABLE	External Table	ALIAS (Alias)
		CN_CALC_EXT_TABLE_ID (Table)
		COLUMN (Columns)
		EXTERNAL_COLUMN_ID (External Column Name)
		EXTERNAL_TABLE_ID (External Table Name)
		INTERNAL_COLUMN_ID (Internal Column Name)
		INTERNAL_TABLE_ID (Internal Table Name)
		NAME (Name)
		SCHEMA (Schema)
		USED_FLAG (Used Flag)

Lookup Type	Description	Lookup Code and Meaning
FORMULA_STATUS	Formula Status	COMPLETE (Complete) FAILED (Failed) INCOMPLETE (Incomplete) IN_PROGRESS (In Progress) INVALID (Invalid) VALID (Valid)
FORMULA_TYPE	Formula Type	B (Bonus) C (Commission)
HEADER_TRX_STATUS	Transaction Header Statuses	CLS (Classified) COL (Unprocessed) ROLL (Rolled Up) XCLS (Failed Classification) XROLL (Failed Rollup)
HOLD_REASON_CODE	Hold Reason Code	HOLD (Hold)
IMPORT_STATUS	Import Status	CANCELED (Canceled) COMPLETED (Completed) FAILED (Failed) IMPORT_FAIL (Failed at Importing) NEW (New) SCHEDULED (Scheduled) STAGED (Staged) STAGE_FAIL (Failed at Staging) SUBMITTED (Submitted)
IMPORT_TYPE	Import Type	CALCEXP (Expressions) HIERARCHY (Hierarchy) IMPORT (Import) EXPORT (Export) REVCL (Revenue Class) RULES (Rules) TRXAPI (Transaction API)

Lookup Type	Description	Lookup Code and Meaning
INCENTIVE_TYPE	Incentive Type	BONUS (Bonus)
		COMMISSION (Commission)
		MANUAL (Manual)
		PAYMENT (Payment)
		QUOTA (Quota)
INCENTIVE_TYPES	Incentive Types	BONUS (Bonus)
		COMMISSION (Commission)
		MANUAL_PAY_ADJ (Manual Pay Adjustment)
		PMTPLN (Payment Plan)
		PMTPLN_REC (Payment Recovery)
INPUT_TOKEN	Input Token	CP_NAME (Comp Plan Name)
		NAME (Name)
		PE (Plan Element)
		PE_NAME (Plan Element Name)
		PERIOD_NAME (Period Name)
		QC (Quota Category)
		QSR (Quota Category/Sequence Number/Role)
		RC (Revenue Class)
		RCS (Role/Compensation Plan Name/Start Date)
		ROLE_NAME (Role Name)
		ROLLPERCENT (Rollover Percentage)
		RP (Base Quota Component/Percent)
		SD (Start Date)
		SEQ (Sequence Number)
		SPE (Source Plan Element)
		SR_NAME (Salesrep Name)

Lookup Type	Description	Lookup Code and Meaning
JE_BATCH_REASON	Reason for creating JE batch	BONUS (Bonus)
		CALC (Calculation)
		DRAW_BONUS (Draw Recovery from Bonus)
		DRAW_COMM (Draw Recovery from Commission)
		PAYMENT (Payment)
		PAY_ADJ (Adjustment Payment)
		PAY_BONUS (Payment from Bonus)
		PAY_COMM (Payment from Commission)
		PAY_DRAW (Draw Payment)
LOAD_STATUS	Load Status	LOADED (Loaded)
		UNLOADED (Unloaded)
MAPPING_TYPE	Mapping Types	COL (Collection)
		EVT (Event)
		SLC (Slice)
MESSAGE_TYPE	Message Types	DEBUG (Debug)
		ERROR (Error)
		TRANSLATE (Translated)
MGR_REPORT	Top Bottom Performance Report Hierarchy Level	1 (Directs)
		2 (Level 1 Indirects)
		3 (Level 2 Indirects)
		4 (Level 3 Indirects)
		5 (Level 4 Indirects)
		ALL (All)
MODEL_ACTIVATE_STATUS	Model Activate Status	ACTIVATED (Activated)
		NOT_ACTIVATED (Not Activated)
MODEL_STATUS	Model Status	MODELED (Modeled)
		NEW (New)
		PENDING (Pending)
		GENERATED (Generated)

Lookup Type	Description	Lookup Code and Meaning
MODULE_STATUS	Module Status	CONCFAIL (Concurrent Manager Down)
		GENERATED (Complete)
		INSTFAIL (Install Failed)
		INSTINPG (Install Pending)
		UNSYNC (Incomplete)
MODULE_STATUS_OLD	Old Module Status	DEF (Definition)
		GEN (Generated)
		GRQ (Generate Request)
		INS (Instantiated)
		IRQ (Instantiate Request)

Lookup Type	Description	Lookup Code and Meaning
MODULE_TYPE	Module Types	ACCGEN (Account Generation)
		CALCULATION (Calculation)
		CB (Clawback Collection Module)
		CB/GB (Clawback/Giveback Collection Module)
		CLS (Classification Module)
		COL (Collection Module)
		CPAPI (Compensation Plan API Module)
		INS (Commissions Instance Module)
		INV (Invoice Collection Module)
		LOADER (Transaction Interface Loader)
		ORD (Order Collection Module)
		PEAPI (Plan Element API Module)
		PMT (Payment Collections Module)
		PMT/GB (Payments/Giveback Collection Module)
		REVCLS (Revenue Classification)
		RUP (Rollup Module)
		SLC (Slice Module)
		TRF (Transfer Module)
		TRX (Commissions Transaction Table Module)
		WO (Writeoff Collection Module)
NOTIFY_ACTION	The action to be taken due to events caused by changing compensation group hierarchy	DELETE (Delete transactions)
		PULL (Pull transactions up)
		ROLL (Roll transactions up)
		ROLL_PULL (Roll and pull transactions up)

Lookup Type	Description	Lookup Code and Meaning
NOTIF_LOOKUP_TYPE	Lookup used by SF Planning workflow process	ACCEPT/REJECT (Accept) APPROVE (Approve) CUSTOMIZED (Customized) DISTRIBUTE (Distribute) NOTIFIED (Notification Sent) NOT_NOTIFIED (Notification not Sent) REMINDER (Reminder)
OBJECT_STATUS	Object Status	I (Invalid) N (New) V (Valid)
OBJECT_TYPE	Object Types	COL (Column) DBL (Database Link) IND (Index) PKB (Package Body) PKS (Package Specification) PRC (Procedure) SEQ (Sequence) TBL (Table) TRG (Trigger)
ORDER	Order	ASC (Ascending) DESC (Descending)
ORGANIZATION	Organization	ALLIANCES (Alliances) BOL (Business Online) EDUCATION (Education) ISD (Telesales) SALES (Sales) SC (Sales Consulting) SUPPORT (Support)

Lookup Type	Description	Lookup Code and Meaning
PAYABLES_CCID_LEVEL	Payables CCID Level	REVCLS (Revenue Class)
		PLANELEM (Plan Element)
		CUSTOM (Custom)
		CLASSIFICATION (Classification)
PAYGROUP_UPGRADE_TYPE	Paygroup Upgrade Type	UPGRADE_PAYGROUP (Upgrade Pay group)
PAYMENT_CHANGE	Payment Change	BONUS (Bonus Change)
		COMMISSION (Commission Change)
PAYMENT_GROUP_CODE	Payment Group Code	STANDARD (Standard)
PAYMENT_INCENTIVE_TYPE	Payment Incentive Type	ALL (All)
		BONUS (Bonus)
		COMMISSION (Commission)
PAYMENT_PLAN_TYPE	Payment Plan Type	MIN/MAX (Minimum/Maximum Plan)
PAYRUN_ACTION	Payrun Action	CREATE (Create Payrun)
		FREEZE (Freeze Payrun)
		PAY (Pay Payrun)
		REFRESH (Refresh Payrun)
		REMOVE (Remove Payrun)
		UNFREEZE (Unfreeze Payrun)
PAYRUN_STATUS	Payrun Status	PAID (Paid)
		PAID_WITH_RETURNED_FUNDS (Paid with Returned Funds)
		POSTED (Posted)
		RETURNED_FUNDS (Returned Funds)
		UNPAID (Unpaid)
		FROZEN (Frozen)
		ALL (All)
PAY_GROUP_DTLS_TYPE_CODE	Pay Group Details Type Code	PERIODS (Period)
		SALESPEOPLE (Resource Assignment)
		ROLES (Role Assignment)

Lookup Type	Description	Lookup Code and Meaning
PAY_GROUP_VALIDATION_TYPE	Pay Group Validation	END_DATE (Pay Group End Date)
		PAY_GROUP_NAME (Pay Group Name)
		PERIOD_SET_NAME (Calendar)
		PERIOD_TYPE (Period Type)
		START_DATE (Pay Group Start Date)
PAY_RUN_VALIDATION_TYPE	Payrun Validation	CREDIT_TYPE (Credit Type)
		EMPLOYEE_NUMBER (Employee Number)
		EMPLOYEE_TYPE (Employee Type)
		PAY_DATE (Pay Date)
		PAY_GROUP_NAME (Pay Group Name)
		PAY_PERIOD (Pay Period)
		PAY_RUN_NAME (Payrun Name)
		ROLE (Role)
		SALES_PERSON (Salesperson)
PAY_STATUS	Pay Status	PAID (Paid)
		UNPAID (Unpaid)
PA_OBJECT_TYPE	Compensation Plan Assignment Objects	EMP_NUM (Employee Number)
PERIOD_PROCESSING_STATUS	Period Processing Status	CALCULATED (Calculated)
		CLASSIFIED (Classified)
		CLEAN (Clean)
		POPULATED (Populated)
		PROCESSING (In Progress)
		ROLLED_UP (Rolled Up)
		UNCLASSIFIED (Unclassified)
PERIOD_TARGET_DIST_RULE	Period Target Distribution Rule	EQUAL (Equal)
		USER_DEFINED (User Defined)
PERIOD_TYPE_CODE	Period Type	PERIOD (Period)
		QUARTER (Quarter)
		YEAR (Year)

Lookup Type	Description	Lookup Code and Meaning
PE_OBJECT_TYPE	Plan Element Objects	CALC_FORMULA_ID (Formula ID)
		CALC_FORMULA_NAME (Formula Name)
		CREDIT_TYPE (Credit Type)
		CUM_FLAG (Accumulate Flag)
		DESC (Description)
		DISC_OPTION (Discount Option)
		DISC_RATE_TB (Discount Rate Table)
		DISC_RATE_TB_ID (Discount Rate Table ID)
		DRAW_AMOUT (Draw Amount)
		END_DATE(End Date)
		END_PERIOD (End Period)
		END_PERIOD_ID (End Period ID)
		INCENTIVE_TYPE_CODE (Incentive Type)
		INTERVAL NAME (Interval Name)
		ITD_FLAG (Interval to Date)
		PACKAGE_NAME (Package Name)
		PAYMENT_AMOUT (Payment Amount)
		PAYMENT_FACTOR (Payment Uplift)
		PAYMENT_TYPE (Payment Type)
		PERIOD_TYPE (Interval Type)
		PE_NAME (Plan Element Name)
		QUOTA_FACTOR (Quota Uplift)
		QUOTQ_TYPE (Element Type)
		RATE_TB (Rate Table)
		RATE_TB_ID (Rate Table ID)
		REV_CLS_ID (Revenue Class ID)
		REV_CLS_NAME (Revenue Class Name))

Lookup Type	Description	Lookup Code and Meaning
PE_OBJECT_TYPE (continued)		REV_CLS_TARGET (Revenue Class Target
		SPLIT_FLAG (Split Flag)
		START_DATE (Start Date)
		START_PERIOD (Start Period)
		START_PERIOD_ID (Start Period ID)
		TARGET (Quota)
		TRX_GROUP (Apply Trx)
		UPLIFT_END_DATE (Uplift End Date)
		UPLIFT_PAYMENT_FACTOR (Uplift Payment Factor)
		UPLIFT_QUOTA_FACTOR (Uplift Quota Factor)
		UPLIFT_START_DATE (Uplift Start Date)
PLAN_ELEMENT_METRICS	Plan Element Metrics	COMMISSION_PAYED_ITD (Interval To Date Commission Paid)
		COMMISSION_PAYED_PTD (Period To Date Commission Paid)
		IMPUT_ACHIEVED_ITD (Interval To Date Input Achieved)
		INPUT_ACHIEVED_PTD (Period To Date Input Achieved)
		ITD_PAYMENT (Interval To Date Payment)
		ITD_TARGET (Interval to Date Target)
		PERF_ACHIEVED_ITD (Interval To Date Sales Credit)
		PERF_ACHIEVED_PTD (Period To Date Sales Credit
		PERIOD_PAYMENT (Period Payment)
		TARGET_AMOUNT (Target Amount)
PLAN_GENERATE_STATUS	Plan Generation Status	FAILED (Failed)
		NOT_PUSHED (Not Activated)
		PUSHED (Activated)

Lookup Type	Description	Lookup Code and Meaning
PLAN_OBJECT_STATUS	Compensation Plan Object Status	COMPLETE (Complete) INCOMPLETE (Incomplete)
PLAN_STATE	Plan State	ACTIVE (Active) INACTIVE (Inactive) IN_PROGRESS (In Progress)
PLAN_STATUS	Contract Plan Status	ALL (All) ACCEPTED (Accepted) APPROVED (Approved) ISSUED (Distributed) SUBMITTED (Submitted)
PLAN_TYPE_STATUS	Plan Type Status	ACCEPTED (Accepted) APPROVED (Approved) GENERATED (Generated) ISSUED (Distributed) LOCKED (Locked) PENDING (Pending) REJECTED (Rejected) SUBMITTED (Submitted)
PLAN_TYPE_SUMMARY_ STATUS	Plan Type Summary Status	PLGS (Pending Approval) APPROVED (Pending Distribution) ISSUED (Pending Acceptance) ACCEPTED (Accepted)
PMT_PLAN_VALIDATION_ TYPE	Payment Plan Validation Type	CREDIT_TYPE (Credit Type) PMT_PLAN_NAME (Payment Plan Name) START_DATE (Start Date)
POSTING_TYPE	Posting Type	EXPENSE (Expense) NON_REC (Non Recoverable) REC (Recoverable) TO_REC (To Recover)

Lookup Type	Description	Lookup Code and Meaning
PRE_PROCESSED_CODE	Preprocessed Code	CRPN (Skip Calculation)
		CRPC (Skip Nothing)
		CRNC (Skip Population)
		CRNN (Skip Population and Calculation)
		CNPC (Skip Rollup)
		CNPN (Skip Rollup and Calculation)
		CNNC (Skip Rollup and Population)
		CNNN (Classification Only)
		NRPC (Skip Classification)
		NRPN (Skip Classification and Calculation
		NRNC (Skip Classification and Population)
		NRNN (Rollup Only)
		NNPC (Skip Classification and Rollup)
		NNPN (Population Only)
		NNNC (Calculation Only)
		NNNN (Skip All)
PROCEDURE_TYPE	Procedure Types	F (Function)
		P (Procedure)
		PRIVATE (Private Procedure)
		PUBLIC (Public Procedure)
PROCESSING_STATUS_CODE	Processing Status	CLEAN (No calculation has ever happened in this period)
PROCESS_TYPE	Process Types	GEN (Generate)
		INS (Instantiate)
		XFR (Transfer)

Lookup Type	Description	Lookup Code and Meaning
QUOTA_CATEGORY	Quota Category Type	FIXED (Fixed)
		TOTAL_QUOTA (Total Quota)
		VAR_NON_QUOTA (Variable, Non Quota Based)
		VAR_NON_REVENUE (Variable, Non Revenue Based)
		VAR_QUOTA (Variable, Quota Based)
QUOTA_GROUP_CODE	Quota Group Code	BONUS (Bonus)
		QUOTA (Quota)
QUOTA_PAYMENT_TYPE	Quota Payment Type	FIXED (Fixed Amount)
		PAYMENT (Payment Amount Percentage)
		TRANSACTION (Applied Transaction Amount Percentage)
QUOTA_TRX_GROUP	Quota Transaction Group	GROUP (Grouped by Interval)
		INDIVIDUAL (Individually)
QUOTA_TYPE	Quota Type	DISCOUNT (Discount)
		DRAW (Draw)
		EXTERNAL (External)
		FORMULA (Formula)
		MANUAL (Manual)
		MARGIN (Margin)
		NONE (None)
		REVENUE (Revenue Non Quota)
		TARGET (Revenue Quota)
		UNIT_BASED_NON_QUOTA (Unit Non Quota)
		UNIT_BASED_QUOTA (Unit Quota)
RATE_CALC_METHOD	Rate Calculation Method	ANCHORS (Anchors)
		SINGLE_RATE (Single Rate)

Lookup Type	Description	Lookup Code and Meaning
REPORT_SECURITY_LEVEL	Report Security Level	A (Analyst)
		M (Manager)
		R (Salesrep)
		S (Super User)
REPOSITORY_STATUS	Repository Status	A (Active)
		I (Inactive)
REPOSITORY_USAGE	Repository Usages	A (All)
		P (Collector)
		S (Calculator)
RESOURCE_PLAN_ACTIVATE_STATUS	Resource Plan Activation Status	FAILED (Failed)
		NOT_PUSHED (Not Activated)
		PUSHED (Activated)
RESPONSIBILITY_GROUPS	Salesforce Planning Responsibility Groups	CN_SF_CONTRACT_APPROVER (Contract Manager)
		CN_SF_FINANCE_MGR (Finance Manager)
		CN_SF_SALES_MGR (Sales Manager)
		CN_SF_SUPER_USER (Super User)
		CN_SF_SALESREP (Sales Force Incentive Compensation User)
RETURN_STATUS	API Return Status	E (Error)
		S (Success)
		U (Unexpected Error)
		W (Warning)
REVENUE_TYPE	Transaction Credit Type	NONREVENUE (Nonrevenue)
		REVENUE (Revenue)

Lookup Type	Description	Lookup Code and Meaning
RS_OBJECT_TYPE	Rate Table Objects	COMM_AMT (Commission Amount)
		COMM_UNIT_CODE (Commission Unit Code)
		MAX_AMT (To Tier Maximum Amount)
		MIN_AMT (From Tier Minimum Amount)
		RATE_TB_NAME (Rate Table Name)
		TIER_UNIT_CODE (Tier Unit Code)
RULE_CREATE_TYPE	Rule Create Type for Root, Sibling, Child	CHILD (Child)
		ROOT (Root)
		SIB (Sibling)
RULESET_TYPE	Ruleset Type	DATA_FLAG (Date Flag)
		END_DATE (End Date)
		EXPRESSION (Expressions)
		MODULE_TYPE (Module Type)
		OBJECT_NAME (Object Name)
		PARENT_RULE_ID (Parent Rule Identifier)
		RULES (Rules)
		RULE_ATTRIBUTES (Attributes)
		RULESET_ID (Ruleset Identifier)
		RULESET_NAME (Ruleset Name)
		RULE_ATTRIBUTE _ID (Rule Attribute Identifier)
		RULE_ID (Rule Identifier)
		RULE_NAME (Rule Name)
		SEQUENCE_NUMBER (Sequence Number)
		START_DATE (Start Date)
SALESREP_OPTION	Salesrep Option	ALL_REPS (All Resources)
		REPS_IN_NOTIFY_LOG (Resources in Notify Log)
		USER_SPECIFY (Resources specified by you)

Lookup Type	Description	Lookup Code and Meaning
SALESREP_STATUS	Salesrep Status	A (Active)
		I (Inactive)
SCALING_FACTOR	OSC: Scaling Factor	0 (No Scaling)
		1 (in tens)
		2 (in hundreds)
		3 (in thousands)
		4 (in tens of thousands)
		5 (in hundreds of thousands
		6 (in millions)
SCENARIO_STATUS	Scenario Status	SET (Set)
		NOT_SET (Not Set)

Lookup Type	Description	Lookup Code and Meaning
SF_FORMULA_TEXT	SF Formula Text	EXPR_RTRS_DESC (SF Planning Rate Result)
		EXPR_RTRS_NAME (SFP Rate_Rslt)
		EXPR_RTRSXTXN_AMT-DESC (SF Planning Rate Result times Transaction Amount)
		EXPR_RTRSXTXN_AMT-NAME (SFP Rate_Rslt*Trx_amount)
		EXPR-TRX_AMT-DESC (SF Planning Transaction Amount)
		EXPR-TRX_AMT-NAME (SFP Trx_amount)
		EXPR-TRX_AMT/QTA-DESC (SF Planning Transaction Amount divided by Quota)
		EXPR-TRX_AMT/QTA-NAME (SFP Trx_amount/quota)
		FORMU-RQAP-DESC (SF Planning Revenue Quota Applied Amount Percentage)
		FORMU-RQAP-NAME (SFP RQAP Formula
		FORMU-RQFA-DESC (SF Planning Revenue Quota Fixed Amount)
		FORMU-RQFA-NAME (SFP RQFA Formula)
		FORMU-UQFA-DESC (SF Unit Quota Fixed Amount)
		FORMU-UQFA-NAME (SFP UQFA Formula)
		RT_TBL_RESULT (Rate Table Result)
		TARGET (Target)
		TRN_AMOUNT (Transaction Amount)

Lookup Type	Description	Lookup Code and Meaning
SF_FORMULA_TYPE	SF Formula Type	RQAP (Revenue Based Quota Applied Amount Percentage)
		RQFA (Revenue Based Quota Fixed Amount)
		UQFA (Unit Based Quota Fixed Amount)
SPLIT_FLAG	Split Flag	N (No Split)
		P (Proportional)
		Y (Non-Proportional)
SRP_OBJECT_TYPE	Salesrep Object Type	ALL_ROLE (All Sales Roles)
		EMP_NUM (Employee Number)
		END_DATE (End Date)
		PAY_GRP (Pay Group Name)
		PMT_PLN (Payment Plan Name)
		ROLE (Sales Role Name)
		SRP_NAME (Salesperson Name)
		SRP_TYPE (Salesperson Type)
		START_DATE (Start Date)
SRP_PAYEE_OBJECTS	SRP Payee Assigns Objects	COMP_NAME (Compensation Name)
		EMPLOYEE_NUMBER (Employee Number)
		END_DATE (Payee End Date)
		PAYEE_NAME (Payee Name)
		PAYEE_START_DATE (Payee Start Date)
		PE_NAME (Plan Element Name)
		ROLE_NAME (Role Name)
		SALESREP_NAME (Resource Name)
		START_DATE (@Payee Start Date)

Lookup Type	Description	Lookup Code and Meaning
TABLE_LEVEL	Table Levels	D (Dimension) H (Header Level) I (Internal) L (Line +) N (None) S (Sales Line)
TABLE_TYPE	Table Types	T (Table) V (View)
TABLE_USAGE	Table Usage	C (Collection) N (None) Y (Calculation)
TBL_COL_DETAIL	Table Column Detail	COL (Columns)
TIMESCALE	Timescale	PERIOD (Period) QUARTER (Quarter) YEAR (Year)
TIME_INTERVAL_TYPE	Time Interval Type	PTD (Period to Date) QTD (Quarter to Date) YTD (Year to Date)
TOP_BOTTOM_PERF	Top Bottom Performer	BOTTOM (Bottom) TOP (Top)
TRIGGERING_EVENT	Triggering Event	D (Delete) I (Insert) U (Update)

Lookup Type	Description	Lookup Code and Meaning
TRX_TYPES	Transaction Types	BALANCE_UPGRADE (Balance Upgrade)
		CBK (Clawback)
		CM (Credit Memo)
		DEP (Deposit)
		DM (Debit Memo)
		GBK (Giveback)
		INV (Invoice)
		MAN (Manual Transaction)
		ORD (Order)
		PMT (Payment)
		PMTPLN (Payment Plan)
		PMTPLN_REC (Payment Plan Recovery)
		RET (Order Return)
		UPGRADE (Upgrade)
		WO (Writeoff)
TRX_ROLLUP_METHOD	Transaction Rollup Method	INV (Invoice Processing Date)
		ORD (Order Processing Date)
TRX_STATUS	Commission Line Status	CALC (Calculated)
		CLS (Classified)
		COL (Unprocessed)
		NCALC (No Calculation)
		OBSOLETE (Obsoleted)
		PAYEE (Payeed)
		POP (Populated)
		ROLL (Rolled Up)
		XCALC (Failed Calculation)
		XCLS (Failed Classification)
		XPAYEE (Failed Payee)
		XPOP (Failed Population)
		XROLL (Failed Rollup)

Lookup Type	Description	Lookup Code and Meaning
UNIT_OF_MEASURE	Measurement unit	AMOUNT (Amount) EXPRESSION (Expression) PERCENT (Percent) STRING (String)
UNIT_TYPE	Unit Type	UNIT (Unit) REVENUE (Revenue)
VIEW_PROCESS_LOG_TYPE	View Process Log Type	ALL (All) BRIEF (Brief) MILESTONE (Milestone Only) ERROR (Errors Only) DEBUG (Debugs Only)
WORKSHEET_ACTION	Worksheet Action	APPROVE (Approve Worksheet) CREATE (Create Worksheet) LOCK (Lock Worksheet) REFRESH (Refresh Worksheet) REJECT (Reject Worksheet) REMOVE (Remove Worksheet) SUBMIT (Submit Worksheet) UNLOCK (Unlock Worksheet)
WORKSHEET_STATUS	Payment Worksheet Status	APPROVED (Approved) LOCKED (Locked) SUBMITTED (Submitted) UNPAID (Unpaid)
YES_NO	Yes or No	N (No) Y (Yes)
YTD_GRAPH_TYPE	YTD Graph Type	A (All) C (Achievement) E (Earnings) N (None) P (Payment)

C

System Profile Options

C.1 System Profile Options

The tables below lists the profile options which need to be set to implement Oracle Incentive Compensation after the product has been installed. You must set them before the system is ready to be used to build compensation plans, collect and process transactions, and pay incentive compensation. The options can be set in any sequence.

Profile options can be set at the following levels:

- **Site:** This is the lowest profile level. Site level profile option values affect the way all applications run at a given site.

- **Application:** These profile option values affect the way a given application runs.

- **Responsibility:** These profile option values affect the way applications run for all users of a given responsibility.

- **User:** These profile option values affect the way applications run for a specific application user. The values you enter for options at the User level supersede the values that your system administrator has entered for you for these options.

Responsibility

System Administrator

Login

Log in to Oracle Forms

Navigation

Navigator > System Profiles

Steps

1. In the Navigator, double-click Profile.

2. Double-click System.

3. In the Find System Profile Values window, query the following categories to narrow your search:

   - *Site:* Select if the profile option applies to all users at your site.

   - *Application*: Oracle Sales Compensation

   - *Responsibility:* Select only if the profile option you are defining is specific to a responsibility.

   - *User*: Select only if the profile option you are defining is specific to a user.

4. In the Profile field, you can enter OSC% to see most of the Incentive Compensation profiles (most of them begin with OSC:). Or, enter another search parameter. You can use the percent sign (%) as a wildcard.

5. Click **Find**.

6. View or change the profile setting.

7. Save.

Note: After you change the setting of a profile option, you must bounce the server to reset it.

C.2 Table of System Profile Options

The following table lists by name and in alphabetical order the system profiles used by Oracle Incentive Compensation. The table includes the following columns from left to right:

- **Profile Name**: Name of the profile.

- **Description**: Explains what the profile does.

- **Level**: Level at which this profile option can be set. A = Application, S = Site, R = Responsibility, U = User.

- **Default**: Lists the seeded default for the profile, if any.

Table C–1   System Profile Options

Profile Name	Description	Level	Default
AMS: Item Validation Master Organization	This is required if you want to display the Product tab in Oracle Incentive Compensation. The value is selected by using an LOV (master organization for which items are defined).	ASRU	Blank
Bypass Group Validation	Set to Y to bypass group usages when defining a resource and assigning that resource to a resource group.	ASR	No
OSC: Apply non-revenue split to quantity	When collecting an invoice, if a resources is assigned non revenue credit only, quantity is not populated if this profile is set to N. If the profile is set to Y, the collection process populates the quantity as the total of revenue quantity and non revenue quantity.	ASRU	N
OSC: Collect on Acct Credits	If set to No, the application collects only invoices and regular credit memos. If set to Yes, then the application also collects account credit memos when running Oracle Receivable Collection.	ASRU	No
OSC: Commission Rate Precision	Determines the commission amount precision in a rate table. For example, 1.035 has a precision of 3.	ASRU	Null
OSC: Currency Exchange Rate Date	If Yes, the application reads the exchange rate date in Oracle GL while using Incentive Planning.	S	System Date
OSC: Customized Summarization	This profile tells the application whether you are using default or customized summarization code to aggregate transactions during rollup. This profile option works only if the Roll Summarized Transactions profile is set to Yes.	ASRU	Null

Table C–1   System Profile Options

Profile Name	Description	Level	Default
OSC: Debug Mode	Determines whether debugging messages are written to the process log during execution of programs (concurrent and online). Setting Debug Mode to Yes writes these errors to the CN_PROCESS_ AUDIT_LINES table.	ASRU	Yes
OSC: Default Conversion Type	Select the type of currency conversion. For example, corporate (usually budget translation rate from Oracle GL), spot (daily rate from Oracle General Ledger), user (user-defined rate as entered through Period Rates).	ASR	Null
OSC: Default Custom Flag	When set to Yes, the compensation plans are customized. Otherwise, they are not customized.	ASRU	Yes
Display Draw	In OSO, the draw related information is displayed on the YTD report when this profile is set to 'Y'. Otherwise, the draw related data is not displayed.	ARU	Null
OSC: Enable Hierarchy Edges T4 Trigger	Set whether to execute a portion of cn_hierarchy_edges_t4 trigger or not.		Null
OSC: Import Control File Directory	This is the directory where the SQL Loader control file is stored. It is recommended that this profile be set at the site level to absolute path for $CN_TOP/bin. $CN_TOP/bin has to be first translated into a full physical path. If the bin directory does not exist it should be created, with read/write/ execute permission given to it.	ASRU	Null
OSC: Import Server Side Data File Directory	The directory where the CSV files for server side transaction import are located. See Guidelines.	ASRU	Null
OSC: Income Planner Disclaimer	Determines whether to use the customized disclaimer in the Income Planner.	ASRU	No

Table C–1   System Profile Options

Profile Name	Description	Level	Default
OSC: Internal Oracle Contract Flag	Determines whether Internal Oracle Flag is set or not.	S	No
OSC: Invoice Split Upgrade End Date	The end date for the invoice split upgrade process.	ASRU	Null
OSC: Invoice Split Upgrade Start Date	The start date for the invoice split upgrade process.	ASRU	Null
OSC: Log File	If set to Yes, debugging messages are written to a log file. Only enable this profile option for debugging purposes if there are suspected problems with the application. If enabled, this profile option generates log files, which can affect performance.	ASRU	No
OSC: Log File Directory	Sets the directory to which the log file will be written. When you enter the directory path, you do not need to enter a slash after the name.	ASRU	Null
OSC: LOV Input Validation	If set to Yes, the two profiles *OSO: Minimum search string length* and *OSO: Search Lead Wildcard* are enforced in LOVs.	ASR	Yes
OSC: Mapping between Revenue Classes and Interest Types		ASRU	
OSC: Mark Events	If set to Yes, every event is put into the Notify Log so that it can be included in the next incremental calculation. Recommended that you set it to No while setting up your system, but change it to Yes when you are ready to start collecting transactions.	ASRU	Yes
OSC: Multi Rollup Path	Enables rollup of sales credits through multiple paths of the compensation group hierarchy. See *Guidelines* for restrictions on using this profile.	ASRU	Null

Table C–1   System Profile Options

Profile Name	Description	Level	Default
OSC: Negate during Revenue Adjustments Collection	Determines whether to negate during Revenue Adjustments Collection. If set to Yes, Revenue Adjustments Collection first negates the corresponding transactions that have been collected before, and then re-collects from Oracle Receivables with the new revenue adjustments. If set to No, Revenue Adjustments Collection does not negate any corresponding transactions in OIC that have been collected before. Only the new revenue adjustment in Oracle Receivables are collected.	ASRU	Yes
OSC: Number of Batch Workers	Set the number of parallel workers that the OIC Sales Credit Allocation Transfer process uses.	ASRU	1
Pay by Transaction	Determines if payment details for a worksheet are displayed at the transaction level or aggregated at the plan element level. Valid values are Y and N. If the value is set to Y, the payment details are shown at the transaction level. If the value is set to N, the payment details are aggregated at the plan element level. If set to N and integration with AP is by Revenue Class, expense codes are not displayed in AP.	S	N
OSC: Prior Adjustment	Allows prior adjustments. If set to No, allows all plan element types in a period to be calculated incrementally. Before setting to No, be sure that any transactions that have a process date earlier than the latest process date shown in the System Parameter window have been calculated.	ASRU	Yes
OSC: Report Security Level		SRU	Salesrep

Table C–1   System Profile Options

Profile Name	Description	Level	Default
OSC: Reporting Hierarchy	Determines which hierarchy is used for managers to view the Commission Statement Report for anyone beneath them in the specified reporting hierarchy.	ASR	Sales Compen-sation
Reset Balances Each Year	If the profile is set to Yes, then the salesrep subledger balances (cn_srp_periods) get reset to zero at the beginning of each fiscal year during calculation and payment. Otherwise the balances carry over across fiscal years.	S	No
OSC: Reset Error Transactions	Determines whether or not the system resets the load status of error transactions to UNLOADED so that they can be picked up again during the next transaction loading process.	ASRU	No
OSC: Roll Summarized Transactions	Sets up the application to aggregate matching transactions.	ASRU	Null
OSC: Salesforce Planning Debug Mode	Determines whether input variables show on the screen.	S	No
OSC: Salesforce Planning FY	This optional setting is used to set the fiscal year for which you are currently planning. You can set a valid year, for example, 2002, or leave the profile unset. If the profile is set to a valid year, the date on search screens defaults to the start of the fiscal year if the current date is smaller than the date of the start of the fiscal year.	S	Null
OSC: Scaling Factor	Select scaling factor. For example, In Thousands will display 1,000,000 as 1,000 and there will be a note at the top of the table, "USD in thousands".	ASRU	No Scaling

Table C–1   System Profile Options

Profile Name	Description	Level	Default
OSC: Sleep Time in Seconds	Sets the amount of idle time between batch runner status checks performed by the parent calculation process'. The idle time gives each phase time to complete the current process without being queried by the system for a status. For high volume transactions, use the default setting.	ASRU	30 seconds
OSC: SQL Spool Path	Spool path for SQL scripts	ASRU	/d07/app /applcsf/h m000a/out
OSC: SFP Disable Workflow Notifications	Profile to disable Workflow Notifications being sent in Incentive Planning. If set to Yes, no notification will be sent to appropriate authority in the case of compensation plan submission, approval or distribution.	SR	No
OSC: SFP Responsibility Group	Profile that is to be set up for each responsibility created for use in Salesforce Planning. The four permissible values are Super User, Contract Approver, Finance Manager, and Sales Manager. The profile setting identifies the data access privileges that are assigned to a particular responsibility.	R	Null
Total Rev % is Not 100	In Sales Credit Allocation, Revenue Split Total is not 100%.	AS	Custom
OSC: Tracking Invoice Lines	When this profile is set to 'Y', any splits or moves done to Invoices are updated to the credit memos and payments, unless the transactions are delinked.	ASRU	No
OSC: Use Work Day Calendar	This profile enables use of the Workday Calendar in proration calculation. (Default is No). Only when this profile is set to Yes is the Workday calendar that is defined for the organization used in proration calculation.	SR	No

Table C–1   System Profile Options

Profile Name	Description	Level	Default
OSC: User's Employee Number	Obsoleted		
OSC: User's Type	Obsoleted		
OSC: Validate Payment Worksheet Statuses	Determines whether the validate payment worksheets statuses must be Approved when paying a payrun. Enables auto approval process for payruns after they have been frozen. When set to Yes, the approval process for worksheets is enforced to pay a payrun. When set to No, a payrun can be paid after it has been frozen regardless of the status of worksheets in the payrun.	S	Y
OSC: Workflow Initial Wait Time in Hours	Sets the number of hours before the first reminder is issued.	ASRU	Null
OSC: Workflow Reminder Frequency in Hours	Sets the interval, in hours, between two reminders.	ASRU	Null
OSO: Debug Messages On	Setting to display or hide debugging messages	ASRU	No
OSO: Enabled Instruction Text	If set to "On", instruction text appears on applicable pages. If set to "Off", instruction text is not displayed.	ASRU	On
OSO: Enable Record Count in Tables	Enables record count in tables.	ASRU	No
OSO: Max Attachment Size	Maximum attachment size in bytes.	S	100,000
OSO: Max Chart Legends	Maximum number of legends in a chart.	ASRU	20
OSO: Max Legend Label Length	Maximum number of characters in chart legend labels.	ASRU	22
OSO: Minimum search string length	Used in Incentive Compensation to set the minimum number of characters required for any search from a text field.	S	4

Table C–1   System Profile Options

Profile Name	Description	Level	Default
OSO: Search Lead Wildcard	Indicates if % can be the first character in a search sent to a list of values	ASRU	No

Guidelines

The following three profile options are set automatically if you run AutoConfig. All of them set the displayed default value at Site Level.

- OSC: Import Server Side Data File Directory - Set to @ "%s_applcsf%/inbound/%s_contextname%".

- OSC: Import Control File Directory - Set to "$CN_TOP/bin"

- OSC: Log File Directory - Set to "%s_applptmp%"

If your inbound/outbound file is being created or is used by a concurrent program, set your profile option value as follows:

- If your profile is used for creating outbound files: "%s_applcsf%/outbound/%s_contextname%"

- If your profile is used for reading or using inbound files: "%s_applcsf%/inbound/%s_contextname%"

Variable and Description (Source adctxinf.tmp, adxmlctx.tmp from ARU):

- %s_applcsf% -> APPLCSF

- %s_contextname% -> The name of the Oracle Applications system which this context points to. This is necessary in order to support running multiple Oracle instances from the same APPL_TOP.

If the value for your profile needs to be defined as a directory in the utl_file_dir parameter in the INIT.ora, please set the value for the profile to:

%s_applptmp% .

APPLPTMP is the standard directory in which Oracle Applications temporary files are created and the directory in which PL/SQL output files are created.

After AutoConfig runs, some profile values will appear differently, as follows:

Table C–2

Before Autoconfig Runs	After Autoconfig Runs
%s_applcsf%/inbound/%s_contextname%	/u01/proddb/admin/inbound/cn
APPLCSF	/u01/proddb/admin
contextname	product name = cn

The *OSC: Multi Rollup Path* profile option is used to set up managerial rollups for a resource who is assigned the same role in multiple groups or multiple roles in the same group. If a resource is assigned a role in multiple groups, it must be the same role. This release of Oracle Incentive Compensation does not support rollup along multiple paths when the managers receiving the credit have different roles in the compensation groups along the rollup paths. This is because the application picks the role at random.

D

Responsibilities

D.1 Responsibilities in Oracle Incentive Compensation

People are assigned different responsibilities in Oracle Incentive Compensation to allow them appropriate access to the application. In the table below, the listed responsibilities are in the HTML version of the application except for Incentive Compensation Developer, which remains in Forms. It is used for making changes to lookups and profile options, and for submitting requests.

The application checks before loading a page that is not accessible from Oracle Field Sales, to determine if the user has the proper responsibility to access the page. If the user is not permitted to view the page, an error message displays:

You are not authorized to access [*jsp name*].

Use the Sales Compensation Payment Analyst role type whenever you define an analyst in Resource Manager for use in Oracle Incentive Compensation. Resources that belong to groups with a usage of Sales Compensation Payment Analyst should be assigned only to a Sales Compensation Payment Analyst role, and they should not be given salesrep numbers. A resource cannot be assigned to both a Sales Compensation Payment Analyst role and to a Sales Compensation role.

If you have analysts that were defined prior to this release that use a Sales Compensation role, remove that role and group member role and assign the Sales Compensation Payment Analyst role.

The Sales Force Incentive Compensation User responsibility was designed to give resources to whom it is assigned access to the Compensation tab by itself within Oracle Incentive Compensation. In previous releases of Oracle Incentive Compensation, a resource needed to have access to Oracle Field Sales to see these reports:

- Year to Date Summary

- Quota Performance

- Commission Statement

Responsibilities
Incentive Compensation Super User
Incentive Compensation Payment
Incentive Compensation Reports
Incentive Planning Analyst
Incentive Planning Contract Approver
Incentive Planning Finance Manager
Incentive Planning Sales Manager
Incentive Compensation Analyst
Incentive Compensation Developer (Forms)
Sales Force Incentive Compensation User

D.1.1 Tab Usage in Oracle Incentive Compensation 11.5.10

The table below shows the tabs in Oracle Incentive Compensation, along with their subtabs. If a responsibility has access to a tab or subtab, the word Yes appears in the column below its name.

Notes:

- The Reports tab is used only by the Incentive Compensation Payment and Incentive Compensation Reports responsibilities to view the set of reports normally accessed from the Report subtab of the Transaction tab.

- The Incentive Compensation Developer responsibility, not shown in the table, is used in the Forms environment only, and does not have access to the HTML environment.

- The Sales Force Incentive Compensation User responsibility has access to the features and reports on the Compensation tab in Oracle Field Sales, including the redesigned Commission Statement report. However, the Sales Force Incentive Compensation User does not have access to any other features in Oracle Field Sales, and unlike users of Oracle Field Sales, does not have access to the Income Planner.

Tab Name	Subtab Name	IC Super User	IC Analyst	IC Payment	IC Reports	IP Analyst	IP Contract Approver	IP Finance Manager	IP Sales Manager
Home	NA	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Incentive	Agreement	Yes	No	No	No	Yes	No	No	No
Incentive	Plan	Yes	Yes	No	No	Yes	No	No	No
Incentive	Element	Yes	Yes	No	No	Yes	No	No	No
Incentive	Formula	Yes	Yes	No	No	Yes	No	No	No
Incentive	Rate	Yes	Yes	No	No	Yes	No	No	No
Incentive	Expression	Yes	Yes	No	No	Yes	No	No	No
Incentive	Credit Rules	Yes	Yes	No	No	No	No	No	No
Modeling	Agreement	Yes	No	No	No	Yes	No	No	No
Modeling	Comparison	Yes	No	No	No	Yes	No	No	No
Modeling	Performance	Yes	No	No	No	Yes	No	No	No
Resource	Planning	Yes	No	No	No	Yes	Yes	Yes	Yes
Resource	Resources	Yes	Yes	No	No	Yes	Yes	Yes	Yes
Resource	Role	Yes	Yes	No	No	Yes	No	No	No
Resource	Group	Yes	Yes	No	No	Yes	Yes	Yes	Yes
Quota	Allocate	Yes	No	No	No	Yes	No	Yes	Yes
Quota	Process	Yes	No	No	No	Yes	Yes	Yes	Yes
Quota	Report	Yes	No	No	No	Yes	Yes	Yes*	Yes**
Quota	Import	Yes	No	No	No	Yes	Yes	Yes	No
Transaction	Collect	Yes	Yes	No	No	No	No	No	No
Transaction	Import/ Export	Yes	Yes	No	No	No	No	No	No
Transaction	Adjust	Yes	Yes	No	No	No	No	No	No
Transaction	Load	Yes	Yes	No	No	No	No	No	No

Tab Name	Subtab Name	IC Super User	IC Analyst	IC Payment	IC Reports	IP Analyst	IP Contract Approver	IP Finance Manager	IP Sales Manager
Trans-action	Calculate	Yes	Yes	No	No	No	No	No	No
Trans-action	Notification Log	Yes	Yes	No	No	No	No	No	No
Trans-action	Payment	Yes	Yes	No	No	No	No	No	No
Trans-action	Commission Statement	Yes	Yes	No	No	No	No	No	No
Trans-action	Report	Yes	Yes	No	No	No	No	No	No
Requests	Collection	Yes	Yes	No	No	No	No	No	No
Requests	Transaction	Yes	Yes	No	No	No	No	No	No
Requests	Calculation	Yes	Yes	No	No	No	No	No	No
Requests	Payment	Yes	Yes	No	No	No	No	No	No
Requests	Allocation Transfer	Yes	Yes	No	No	No	No	No	No
Requests	Allocation Process	Yes	Yes	No	No	No	No	No	No
Product	All	Yes	Yes	No	No	Yes	Yes	Yes	Yes
Admini-stration	All	Yes	Yes	No	No	Yes	No	No	No
Payment	NA	No	No	Yes	No	No	No	No	No
Reports	NA	No	No	Yes	Yes	No	No	No	No

* Incentive Planning Finance Manager has access set by Incentive Compensation Super User using the User Access page.

**Incentive Planning Sales Manager has access only to information regarding his or her direct reports.

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