

Oracle® Incentive Compensation

Implementation Guide

Release 11*i*

Part No. B10585-01

April 2003

Oracle Incentive Compensation Implementation Guide, Release 11i

Part No. B10585-01

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Oracle Incentive Compensation Implementation Guide, Release 11i

Part No. B10585-01

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
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Preface

Intended Audience

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

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

- The principles and customary practices of your business area.
- Incentive Compensation

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

- 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

This document contains the information you need to understand and use Oracle Incentive Compensation.

- Chapter 1 is an introduction that covers general features, lists new features in this release, and discusses the HTML user interface.
- Chapter 2 lists steps to perform before implementation and also dependency requirements.

- Chapter 3 presents an overview of the implementation steps in table format.
- Chapter 4 comprises the main body of the document, with the implementation steps detailed step by step.
- Chapter 5 contains verification information.
- Chapter 6 contains troubleshooting information.
- Chapter 7 discusses integration between Oracle Incentive Compensation and other Oracle products.
- The Glossary defines the most important terms used in the document.
- The Index supplies quick access to specific topics in the document.
- 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 version of the product.
- Appendix C details the profile options used in this release of Oracle Incentive Compensation.
- Appendix D presents a useful road map that compares the navigation in earlier versions of the application, which was primarily in Forms, to the latest release, which uses an HTML user interface.
- Appendix E shows the different responsibilities used in Oracle Incentive Compensation and the access each responsibility has to the tabs in the application.

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 Corporation 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 online 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). Online help patches are available on MetaLink.

Related Documentation

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

You can read the documents 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 at <http://oraclestore.oracle.com>.

Documents 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) available with this release of Oracle Incentive Compensation (and any other Oracle Applications products). 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.

Documents Related to This Product

Oracle Incentive Compensation Concepts and Procedures

This guide contains two sections. The first, *Understanding*, explains the basic functions of the application. The second section, *Using*, contains the text of the online help for Oracle Incentive Compensation.

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, the Oracle8 technology stack, and the Oracle8*i* Server 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's guides and implementation guides.

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.

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 Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Other Implementation Documentation

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 manual 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 Metalink.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Incentive Compensation and reach full productivity quickly. 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's 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 Oracle8i server, and your hardware and software environment.

Oracle*MetaLink*

OracleMetaLink 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 *OracleMetaLink*, 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 *OracleMetaLink*, register at (<http://metalink.oracle.com>).

Alerts: You should check *OracleMetaLink* 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 Corporation 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.

Part I

Getting Started

This section of the Oracle Incentive Compensation Implementation Guide contains the following chapters:

- [Chapter 1, "Introduction"](#)
- [Chapter 2, "Before You Begin"](#)

Introduction

This chapter provides information on the following topics:

- [Section 1.1, "The Oracle E-Business Suite"](#)
- [Section 1.1.2, "Oracle Sales Family Overview"](#)
- [Section 1.2, "Oracle Incentive Compensation Overview"](#)
- [Section 1.3, "Navigation"](#)

1.1 The Oracle E-Business Suite

The Oracle E-Business Suite is a comprehensive web-based answer for business-to-business (B2B) and business-to-consumer (B2C) selling, marketing, and servicing through the Internet. The Oracle E-Business Suite consists of front-office Customer Relationship Management (CRM) applications and back-office Enterprise Resource Planning (ERP) applications. These applications automate marketing, sales, contracts, service, manufacturing, and supply chain processes as well as financial operations, project management, human resources operations, and business intelligence systems.

The Oracle E-Business Suite sits on a multi-layer platform which includes:

- Oracle *9i* Database
- Oracle *9i* Application Server
- Common Services and Components
- Oracle Internet Business Intelligence

Oracle 9i Database

All applications reside on the Oracle9i Database. The Oracle database drives enterprise E-Business applications, online transaction processing applications (OLTP), query-intensive data warehouses, and high capacity web sites. Because the Oracle database is available on many different platforms, applications can scale from handheld to laptop to desktop to enterprise providing consistent information over multiple channels.

Oracle 9i Application Server

The Oracle 9i Application Server (Oracle 9iAS) is a middle-tier server which independently delivers the technology needed to build web sites and applications, create personalized portals, extract business intelligence, and manage a secure web site infrastructure.

Common Services and Components

All the applications can leverage the common infrastructure and services components. Functionality includes Oracle Forms, Oracle Reports, Oracle Application Object Library (AOL), the Oracle JDeveloper and Oracle Discoverer development tools, the coding and UI standards, and other functionality used by the applications.

For example, you can extend the applications according to your business needs using flexfields. You can create and assign responsibilities using the system administrator responsibility. Also, you can use Oracle Workflow to configure background processes and set up notifications so that all the appropriate managers and groups are notified.

Oracle Internet Business Intelligence

Above the E-Business Suite sits the Internet Business Intelligence application. This application integrate data from all of the E-Business Suite applications to provide key performance measurements, operating alerts, and management reports to every decision maker across the enterprise.

1.1.1 The Applications in the E-Business Suite

Customers can seamlessly share data from front-end applications (CRM) to backend applications (ERP). The CRM applications include:

- the Marketing suite
- the Sales suite

- the Contracts suite
- the Service suite
- the eCommerce suite

The ERP applications include:

- Oracle Order Management
- Oracle Supply Chain Planning
- Oracle Manufacturing
- Oracle Financials
- Oracle Human Resources Management System

Customer Relation Management (CRM)

Companies use Oracle's CRM suite of applications to acquire, maintain, and enhance customer relationships, by assisting companies with marketing automation, sales force automation, contracts management, customer service and support, and business intelligence, in a multi-channel environment.

- The Marketing suite provides campaign planning and execution, budget management, list creation, reporting and analysis tools. Marketing professionals use the Oracle Marketing applications to drive quality leads to sales, to expand reach and to maximize marketing effectiveness by using a comprehensive set of marketing automation, analysis and multi-channel execution capabilities. The Marketing suite offers seamless integration with sales, service and operations.
- The Sales suite provides integrated tools for all those who are involved in the sales process, including field salespeople, telesales agents, distributors and resellers, customers purchasing over the Internet and sales executives.

Armed with up-to-the minute information regarding customers, leads and opportunities, as well as forecasts and compensation plans and projections, managers can proactively and effectively manage a sales force while providing the sales people with the information needed to close sales. Using this information, the field sales force, telesales teams, resellers, and web storefronts can collaborate in closing more business together as one sales team.

- The Contracts suite enables authoring, executing and managing contracts, warranties and extended warranties which provides visibility to contract entitlements and proactively acting upon contractual commitments. Whether a

buyer or a seller, issuing contracts or receiving them, the Contracts suite automates the full contract life cycle.

- The Service suite manages service activities with the goals of profitability, employee productivity and complete customer satisfaction by addressing all service and support activities from initial contact with the customer through issue resolution. Automating service efforts can potentially transform an area that has historically proven to be a cost center into a revenue generator.

This suite of applications provides customer support, field service and depot repair functionality. In addition, Oracle Services offers complete visibility into spare parts availability, logistics, service billing and customer contract entitlements. Oracle Customer Care provides full access to customer information from each touch point in the enterprise and to each customer care agent or other employees who interact with the customer. All of the Service products can be deployed across web, call center and mobile field channels.

- The eCommerce suite of products aids in establishing profitable long-term relationships with customers through one-to-one marketing and personalized shopping experiences as well as proactive support and self-service capabilities. Oracle eCommerce synchronizes all customer interactions and transactions by integrating web-based channels with traditional channels.

Enterprise Resource Planning (ERP)

Companies use the ERP applications to control their back-office operations. For example:

- Oracle Order Management applications feature advanced configurator functionality, global available to promise, flexible pricing support, efficient delivery, high volume transactions and flexibility to adapt to changing business conditions.
- Oracle Supply Chain Planning applications provide the tools required to optimize flow of material, cash, and information across the extended supply chain.
- Oracle Manufacturing applications support all styles of manufacturing - engineer-to-order, discrete, process, flow, lot based, and project based manufacturing.
- Oracle Financials provide solutions for strategic planning, accounting, treasury, project management, and travel management.

- Oracle Human Resources Management System is a comprehensive solution for managing a company's human resources, allowing organizations to attract, retain and develop critical skills and knowledge on a global basis.

Common Application Architecture

The Common Application Architecture includes functionality that supports both CRM and ERP applications. For example, TCA, Oracle's Trading Community Architecture, consists of a database schema and Application Programming Interfaces (APIs) where you can model the complex relationships that occur within a business community and enter that data consistently throughout the enterprise. Because the model is not hierarchical, Oracle applications can model complex B2B2C relationships and not to be limited to either a B2B or B2C implementation. TCA delivers a 360-degree view of the customer.

1.1.2 Oracle Sales Family Overview

Oracle Sales is a comprehensive family of tightly integrated applications to maximize sales, increase selling effectiveness, and align sales behavior to corporate objectives across all sales channels. Oracle Sales enables the field sales force, telesales teams, resellers, partners, and web storefronts to collaborate in closing more business together as one sales team. Oracle Sales enables companies to implement flexible, customer-centric processes, not only to sell effectively and increase revenue, but also to create and enhance long-term customer relationships.

The Oracle Sales Family includes:

- Sales Online
- Sales Offline
- TeleSales
- Incentive Compensation
- Oracle Collections
- Sales Intelligence

1.2 Oracle Incentive Compensation Overview

Using Oracle Incentive Compensation you can automate the complex task of calculating compensation and customize compensation to suit the unique operations of your organization's sales force.

Because sales tasks vary greatly from one company to another, a compensation system that produces windfall sales for one company might not suit another. Oracle Incentive Compensation calculates and assigns compensation based on functions that precisely mirror the operations of your sales organization.

Oracle Incentive Compensation enables you to perform a wide variety of different functions.

You can define the structure of a compensation transaction, or the set of information your sales organization needs to calculate incentive compensation. You specify the data you need, and Oracle Incentive Compensation then collects this data for you from the sources you specify.

You can categorize your business revenue into revenue classes that specify the types of revenue that warrant compensation in your organization. Oracle Incentive Compensation assigns a revenue class to a compensation transaction using a set of classification conditions you define for each class. Oracle Incentive Compensation only awards credit based on the revenue classes you assign to a resource's compensation plan, so you can pay a resource for certain revenue classes but not for others.

You can define an unlimited number of compensation plans and assign them to individuals or groups of resources. You can compensate many different kinds of resources by mixing and matching compensation terms when you build each plan.

You can define how your organization tracks and pays incentive compensation.

You can specify how your organization typically makes adjustments.

You can view information about your resources and also make customizations to their individual compensation plans. You can view a resource's compensation summary, compensation plan, sales roles, and compensation group. In addition, you can assign pay groups and payment plans to customize the way a resource is paid.

After you define precisely how your sales force operates, you can generate your own customized version of the system from which to pay incentive compensation. You can respond to changing sales strategies by making changes in your setup and regenerating the system.

You can model different versions of compensation plans before you distribute them to resources.

As a manager, you can systematically distribute your quota to the resources who report to you directly. Your resources can accept their plans by using Oracle Sales Online, after which you can approve the plans in Oracle Incentive Compensation.

1.3 Navigation

1.3.1 HTML Navigation

Starting with the 11.5.6 release of Oracle Incentive Compensation 11*i*, an HTML user interface replaced the Forms user interface used in previous releases.

This change improves integration of Oracle Incentive Compensation with other Oracle products, and put it in line with the consistent look and feel of other HTML based Oracle applications. Users upgrading from pre-11.5.6 releases of Oracle Incentive Compensation will notice that the HTML interface reduces the number of steps and drilldowns required to perform some functions. The Forms Navigator, icons, "View By" drop-down lists, and hierarchies have been replaced by a row of nine tabs, using subtabs and side panel menus to display finer levels of detail.

The HTML user interface uses five levels of navigation: global icons, tabs, subtabs, and side panel menu (two levels). Most of the features in previous Forms versions of Oracle Incentive Compensation have been converted, and are placed in different, more logical locations. See *Appendix D Road Map* for a complete listing. In addition, some data entry and organization has changed. In general, the HTML-based pages are easier to use and require fewer drilldowns to complete a task.

For example, to see a listing of plan elements or to create new ones, navigate to the Incentive tab > Element subtab. When navigating in HTML, place your cursor over a tab or subtab, the arrow changes to a pointing hand. Click to go to the new page.

HTML pages provide links to other pages. Links are shown as underlined text. Use a link the same way you use a tab or subtab:

1. Roll the cursor onto the link.
2. Click the left mouse button.

The new page appears.

In the previous version of Oracle Incentive Compensation, to view or create plan elements you clicked the Compensation Plans icon, selected View By Plan Element, and then opened a node in the Navigator. After opening a plan to view it, four tabs appeared, for General information, Revenue Class, Formula, and Rate Tables. In the HTML interface, formulas and rate tables are found on neighboring subtabs, along with the calculation expressions used to create them. Revenue classes, which are less frequently changed, now are placed on the Administration tab.

Many tabs and subtabs open with a brief search page. Enter search data in a field or use a list of values, click Apply, and a summary page appears. Continue to search

using the search button, or move to the next group of rows by clicking the drop down list and then selecting a range. In some cases, you can click the Next or Last links to see the following or final group of listing, or click the First or Previous links to view the first or previous listings. If there are hundreds of items listed, the drop-down lists enable easier selection.

HTML pages use a Quick Find search field, located at the top of the page just below the subtabs. Each subtab has a Quick Find, with a drop down menus and an Advanced Search link. Many pages provide a wildcard search and drop down menus in the parameters area near the top of the page. A Go button is provided to initiate searches of lists of values. Many of the pages that display tables use Update, Restore, Create, and Clear buttons at the beginning and end of the display:

Update - Used to saving newly entered data

Restore - Returns the display to the original content before the last save

Create - Opens a new page on which to create new data

Clear - On a Create page, clears any data that has been entered prior to being saved

Listed below are the nine tabs in Oracle Incentive Compensation. Explanations of each tab follow the list.

- [Section 1.3.2, "The Home Tab"](#)
- [Section 1.3.3, "The Incentive Tab"](#)
- [Section 1.3.4, "The Modeling Tab"](#)
- [Section 1.3.5, "The Resource Tab"](#)
- [Section 1.3.5, "The Resource Tab"](#)
- [Section 1.3.6, "The Quota Tab"](#)
- [Section 1.3.7, "The Transaction Tab"](#)
- [Section 1.3.8, "The Requests Tab"](#)
- [Section 1.3.9, "The Product Tab"](#)
- [Section 1.3.10, "The Administration Tab"](#)

1.3.2 The Home Tab

The Home tab is the starting point for using Oracle Incentive Compensation. The text on it can be configured.

1.3.3 The Incentive Tab

The Incentive tab is where compensation plans are built, viewed, and activated. There are seven subtabs.

The first subtab, Agreement, is used in Incentive Planning. It opens to an Agreements search page. Click the link in the Name column of search results to go to the Sales Role Detail page, where you can define the agreement for the role.

The Activation subtab is where agreement definitions from Incentive Planning are activated into the Commissions module of Oracle Incentive Compensation: Role assignment, compensation plan assignment, plan element assignment, formula and rate table assignment, and effective date assignment.

The Plan subtab is where you can assign plan elements and sales roles. Below the subtab level you can view plan details, assign plan elements and sales roles, and view the list of resources using the compensation plan.

The Element subtab is where you view and create plan elements. Drill down on a plan element on the opening page to go to the Plan Element Details page, where you can assign formulas and revenue classes.

The Formula subtab is where you create formulas from input expressions, output expressions, and rate tables.

The Rate subtab is where you can create rate dimensions and rate tables, and define commission rates.

The Expression subtab is where you create expressions to be used in formulas.

1.3.4 The Modeling Tab

The Modeling tab contains compensation planning and modeling features. A compensation analyst can create different commission scenarios and compare the commissions earned by each compensation plan. The most appropriate compensation plan can then be activated for use with the commissions module.

The three subtabs in the Modeling tab are Agreement, Comparison, and Performance. All three subtabs open to a search page and then display summary pages that show various agreement versions.

The Agreement subtab is where the agreements are defined. Quota and on-target earnings are also defined in the Agreement tab. Analysis of earnings payouts occurs in the other two Modeling tab subtabs.

The Comparison tab displays in graphs and tabs the payouts earned in each version of a plan.

The Performance tab shows Estimated Achievement and Estimated Payout fields along with other plan version information. The analyst must input a revenue amount to evaluate what the commissions will be.

Agreement versions are created in the Agreement subtab and can be activated to final agreements from the Comparison subtab or Performance subtab.

1.3.5 The Resource Tab

Use the Resource tab to manage information about resources. The Resource tab contains four subtabs, including Planning, Resources, Role, and Group.

The Planning subtab is used by Incentive Planning and enables the assignment of roles to resources for a specific group. It displays current assignments and allows earnings to be customized as defined by the agreement to the role.

The Resources subtab displays all resource assignments such as roles, compensation plan, plan elements, customized quotas and rates, pay groups, payment plans, and compensation summaries.

The Role subtab is where you can search for a role and then assign compensation plans to it.

The Group subtab enables a view of compensation groups to which a logged in user is a member. It also displays details about those groups. Click a group name on the Groups page, and then you can view details and a hierarchy by clicking links on a side panel menu.

1.3.6 The Quota Tab

The Quota tab is where you use Incentive Planning to distribute quota from a sales manager to directs and down to street level resources. The five subtabs are Allocate, Approve, Distribute, Activate, and Report, which brings includes ten Incentive Planning reports.

The Allocate subtab is where you allocate quota to resources. Sales projections can be spread from top-to-bottom as the page displays managers and direct reports. The manager's ratio of his or her quota to the allocated quota of the reports is calculated and displayed here.

The Approve subtab is where a quota, after it is allocated to a resource, becomes a generated contract and is submitted to the contract approver for approval. The approver receives notification that a contract has been submitted and must approve or reject it.

The Distribute subtab enables you to distribute approved contracts by using the Distribute column.

The Activate subtab updates the quota and rates agreed upon by the resources and moves it into the commission module of Oracle Incentive Compensation.

The Report subtab gives access to the ten Incentive Planning reports.

1.3.7 The Transaction Tab

The Transaction tab contains eight subtabs: Collect, Import/Export, Adjust, Load, Calculate, Notification Log, Payment, and Report.

Use the Collect subtab to view past collection submission records or to submit collection. The View Request Status page allows you to view the collection type, phase and status of the transactions collected, with a default of All in each. On the Submit Request page you can indicate a start period and end period, and submit a request for a new collection. On the Runtime Parameters page you can narrow the collection process by entering values for previously defined runtime parameters.

On the Import/Export subtab you can import data into Oracle Incentive Compensation for hierarchies, classification rulesets, calculation expressions, and revenue classes. You can export data from Oracle Incentive Compensation for hierarchies and expressions.

Use the Adjust subtab to correct errors in transactions or adjust sales credit assignment for transaction information in the CN_COMMISSION_HEADERS table. You can create a new transaction or load a transaction from the first page of the subtab.

Use the Load subtab to copy transactions from the Transaction Interface Table into Oracle Incentive Compensation. This must be performed before calculation can take place.

Use the Calculate subtab to run calculation processes. The opening page enables you to select a batch name or create a new batch by clicking the Create button.

Use the Notification Log subtab to view the Notify Log. The Notify Log automatically records every change in the system that affects calculation and lists what part of the calculation must be rerun as a result of an event.

Use the Payment subtab to create or view information on a payrun. A payrun pays members of a pay group for a particular pay period.

Use the Report subtab to refer to the eight Compensation reports.

1.3.8 The Requests Tab

The Requests tab is where you can make concurrent requests to perform collection, calculation, and payment. There are four subtabs: Collection, Transaction, Calculation, and Payment. These subtabs have redundancy with pages on the Transaction tab, particularly in the Collection and Calculation areas.

Use the Collection subtab to submit collections of clawbacks, invoices, orders, payments givebacks, and custom transaction sources. Three subcategories include View Request Status, Submit Request, and Runtime Parameter.

Use the Transaction subtab to identify all credit memos and payments that need to be split. The two links on this page are View Request Status and Submit Request.

Use the Calculation subtab to run calculation processes. The opening page enables you to select a batch name or create a new batch by clicking the Create button.

On the Payment subtab you can delete a payrun, create a worksheet, or pay a payrun.

1.3.9 The Product Tab

The product tab is used to manage products and their price lists. In a connection to Oracle Marketing, this tab is used to work with products or product bundles. Use of the tab in Oracle Incentive Compensation is optional.

Functions include:

- Searching, creating, or viewing details for a product or a product bundle in inventory
- Creating or viewing offers for a product or a product bundle
- Specifying products for a product bundle
- Modifying a product or product bundle
- Displaying, creating, or modifying price lists
- Other activities relating to marketing products and product bundles

The Product tab is accessed through Oracle Marketing. See the section, "Implementing the Product Tab" in the Oracle Marketing documentation.

1.3.10 The Administration Tab

The Administration tab is the home of many of the setup functions of Oracle Incentive Compensation. Administration tab functions mostly are those that are

provided when Oracle Incentive Compensation is implemented, but are infrequently changed afterwards.

The Administration tab has multiple subtabs, including General, Marketing, Partner, Sales, Incentive, and Collections, to enable administrative functions in different Oracle products. The Incentive subtab is the one that applies to Oracle Incentive Compensation.

Click the Incentive subtab to open a side panel menu with 22 selections. Their primary functions are listed below:

Parameters - View and set System Parameters.

Tables - Define tables from Accounts Receivable, Order Management, or an external source that are used in collecting and calculating transactions in Incentive Compensation.

External Table - Map external tables to destination tables in Oracle Incentive Compensation. Column mapping is performed here, too.

Accumulation Period - Change the status of accumulation periods.

Pay Periods - View essential information about pay periods that are set up for a particular calendar.

Interval Types - View and define interval types.

Revenue Class - Create or remove revenue classes and assign expense codes and liability codes.

Ruleset - Create and synchronize rulesets in the rules hierarchy.

Hierarchy - Display hierarchy types and create, remove, or edit them, and set the effective date intervals.

Credit Type - Set credit types.

Credit Conversion - Set conversion rates between credit types.

Collection - Define and Maintain Collection setup. There are six subheadings within this subtab, including Transaction Sources, Source Tables, Queries, Mapping, Actions, and Generate.

Pay Group - View, create, or remove pay groups.

Payment Plan - View payment plan data, with check boxes to indicate if compensation is recoverable or to be paid later.

Payroll - Map Oracle Incentive Compensation plan elements to Payroll Pay Elements. Remove or deactivate elements, or map input values.

Component - Display or remove Quota Components by name, description, type, unit/revenue, and computed flag.

Attainment - Add, delete, or edit existing attainment schedules by defining the specific levels of quota achievement.

Job Titles - Assign a Sales Role to a Job Title.

User Access - Set the access privilege of users with finance manager responsibility only.

Settings - Set the Transaction Calendar and write Contract Text for a compensation plan.

Seasonality - Set up a schedule to define the pattern of a product or service income by period in the form of proportions expressed in percentages of the year's total.

Rate Dimensions - View, edit, or create rate dimensions here that can be used when building rate tables for formulas.

Before You Begin

This chapter provides an overview of what you need to have installed, implemented, and verified before implementing the Oracle Incentive Compensation. Topics include:

- [Section 2.1, "Related Documentation"](#)
- [Section 2.2, "Installation Verification"](#)
- [Section 2.3, "Application Procedures"](#)
- [Section 2.4, "Mandatory Dependencies"](#)
- [Section 2.5, "Conditional Dependencies"](#)

2.1 Related Documentation

See the *Oracle Incentive Compensation User Guide* and MetaLink.

2.2 Installation Verification

Create users and assign Oracle Incentive Compensation Super User responsibility and System Administrator responsibility to one or more users. All implementation of Oracle Incentive Compensation can be completed using these responsibilities.

2.3 Application Procedures

You must be able to complete each of the following non-CRM tasks successfully for your CRM applications to work properly. If you are unable to complete a task successfully, then correct the problem before continuing. The listed tasks are generic tasks that are typical of all users of the Oracle E-Business Suite. Depending on your

business processes, and the modules that you are installing, not every listed task is applicable to your installation.

2.3.1 Creating an FND User

Perform the following steps to create a FND user in the Application Object Library.

Reference

Oracle Applications System Administrator's Guide, See Chapter 2, Managing Oracle Applications Security

Prerequisites

None

Responsibility

System Administrator

Navigation

Navigate to **Security > User > Define**.

Steps

1. In the User window, enter a new user name in the User Name field.
2. Enter a password in the Password field.
3. Re-enter the password for verification.
4. Select the employee's name from the list of Values (LOV) in the Person Field.
5. In the Responsibilities sub-tab, select the CRM HTML Administration responsibility from the drop-down list of values.
6. Save the new user.

To verify that the user setup is successful, perform the following steps:

1. Login to your Personal Home Page as the newly created user.
2. Enter your new password when prompted.

You should now be able to access the Personal Home Page for this user.

Note: For this user to have access to HTML applications, you must set additional profile options as detailed in the Implementing Oracle CRM Application Foundation manual.

2.3.2 Assigning AOL Responsibilities to the User

A responsibility defines an application user's current privileges while working with Oracle Applications. When an application user signs on, they select a responsibility that grants certain privileges, specifically:

- The functions that the user may access. Functions are determined by the menu assigned to the responsibility.
- The concurrent programs, such as reports, that the user may run.
- The application database accounts to which forms, concurrent programs, and reports connect.

You cannot delete a responsibility because this information helps to provide an audit trail. You can deactivate a user's responsibility at any time by setting the End Date to the current date. If you wish to reactivate the responsibility for the user, change the End Date to a date after the current date, or clear the End Date.

After creating the FND User, perform the following steps to assign the user AOL responsibilities.

Reference

Managing People Using Oracle HRMS (US), See Chapter 1, Employee Management

Prerequisites

None

Responsibility

System Administrator

Navigation

Navigate to **Security > User > Define**.

Steps

1. With the user information populated in the window, select the Responsibility field in the Responsibilities tab.
2. Select the necessary responsibility from the List of Values (LOV).
3. Define the Effective dates.
4. Save your work.

2.3.3 Setting User Application, Responsibility, or Site Level Profile Options

A user profile is a set of changeable options that affect the way your application looks and behaves. As System Administrator, you control how Oracle Applications operate by setting user profile options to the values you want. You can set user profile options at four different levels: site, application, responsibility, and user.

After creating the FND User, perform the following steps to set profile options.

Reference

Managing People Using Oracle HRMS (US), See Chapter 1, Employee Management

Prerequisites

None

Responsibility

System Administrator

Navigation

Navigate to **Security >Profile > System**.

Steps

1. In the Find System Profile Values window, Enter the profile option you want to set and click **Find**.

The System Profile Values window opens with the profile option you searched for.
2. Set at least one of the following:
 - a. Set the Site value.

This field displays the current value, if set, for all users at the installation site.

- b.** Set the Application value.

This field displays the current value, if set, for all users working under responsibilities owned by the application identified in the Find Profile Values block.

- c.** Set the Responsibility value.

This field displays the current value, if set, for all users working under the responsibility identified in the Find Profile Values block.

- d.** Set the User value.

This field displays the current value, if set, for the application user identified in the Find Profile Values block.

You should set site-level default values for any required options after installation of an application. If you do not assign a particular profile option at any of the four levels, that option does not have a default value and may cause errors when you use forms, run reports, or run concurrent requests.

- 3.** Save your work.

2.3.4 Creating an Employee

To successfully run most of the CRM products, you must first create employee resources within the ERP Human Resource Management System (HRMS) application. Perform the following steps to define an employee for minimal functionality.

Note: If Oracle HRMS is not installed, then you must enter a new employee using the Enter Person form by navigating to **Resource Manager > Maintain Employee > Employee**.

Reference

Managing People Using Oracle HRMS (US), See Chapter 1, Employee Management

Prerequisites

None

Responsibility

US HRMS Manager or US Super HRMS Manager

Navigation

Navigate to **People > Enter and Maintain**.

Steps

1. Click **New** In the find window.
The People window opens.
2. Enter the following employee information in the appropriate form fields:
 - Last Name
 - First Name
 - Title
3. Select the person's gender from the drop-down list.
4. Select Employee from the type drop-down list.
5. Enter the person's social security number.
6. Save you work.

2.3.5 Creating a New Business Unit

A Business Group is a special class of organization. Every Business Group can have its own set of default values, with its own internal organizations, grades, jobs, positions, payrolls, employees, applicants, compensations and benefits.

Organizations are the basic work structure of any enterprise. They usually represent the functional, management, or reporting groups which exist within a Business Group. Perform the following steps to create a new business unit.

Reference

Oracle Applications System Administrator's Guide, See Chapter 2, Managing Oracle Applications Security

Prerequisites

None

Responsibility

US HRMS Manager or US Super HRMS Manager

Navigation

Navigate to **Work Structures > Organization > Description**.

Steps

1. Click **New** in the Find Organization window.
2. Enter the name for the Organization
3. Select Business Unit from the list of values (LOV) in the Type field.
The current date populates the From Date field.
4. Enter the Organization location details from the LOV.
5. Save your work.
6. In the Organization Classification region, select the classification from the LOV.
7. Select the Enabled check box.
8. Save your work.
9. Click **Others** for additional information on the classification you selected.
10. Save your work.

2.3.6 Creating a Customer

Perform the following steps to create a new customer, with an address and contact information in the Oracle ERP Accounts Receivables application.

Reference

Oracle Receivables User's Guide, See Chapter 3, Customers

Prerequisites

None

Responsibility

Receivables Manager

Navigation

Navigate to **Customers > Standard**.

Steps

1. In the Find/Enter Customers window, select Person from the Customer Type drop-down list.
2. Enter the name of the customer in the Name column.
3. Click **Find** to ascertain if the customer already exists.
As this customer does not exist, the New button is enabled in the Decisions window.
4. Click **New**.
The Customer-Standard window opens.
5. On the Address tab, click **New** to create a new address.
The Customer Addresses window opens.
6. Fill in the necessary information. Yellow fields are mandatory.
7. On the Business Purpose tab, fill in the Usage, Location and select the Primary check box. For example:
 - Usage: Marketing
 - Location: 6op9
 - Primary: Yes
8. On the Contacts: Telephones tab, enter a new contact and phone number.
9. Save your work.

Verify the Information

To verify that the process worked properly, perform the following steps.

1. Open the Customer-Standard window again.
2. Enter the company name you entered above.
3. Click **Find** to query for the record you created in the Match Results window.
4. If the record is found, click the Contacts: Telephone tab.
5. Place the cursor in the Last Name field

6. From the menu, select **View > Query by Example > Enter**.
7. Enter the contacts last name as the search criteria.
8. Click **View > Query by Example > Run**.

If the record for your contact name populates in the form, then you have successfully created a customer with an address and a contact person for the customer.

2.3.7 Creating a New Organization

Perform the following steps to create a new organization, with an address and contact information in the Oracle ERP Accounts Receivables application.

Reference

Oracle Receivables User's Guide, See Chapter 3, Customers

Prerequisites

None

Responsibility

Receivables Manager

Navigation

Navigate to **Customers > Standards**.

Steps

1. In the Find/Enter Customer window, select Organization from the Customer Type drop-down list.
2. Enter the name of a test corporation in the Name field.
3. Click **Find** to ascertain if the customer already exists.
As this customer does not exist, the New button is enabled.
4. Click **New**.
The Customer-Standard window opens.
5. On the Address tab, click **New** to create a new address.

The Customer Addresses window opens displaying the same business purpose table as on the first tab.

6. Fill in the necessary information. Yellow fields are mandatory.
7. On the Business Purpose tab, fill in the Usage, Location and select the Primary check box. For example:
 - Usage: Marketing
 - Location: 6op9
 - Primary: Yes
8. On the Contacts: Telephones sub-tab, enter a new contact and phone number.
9. Save your work.

2.3.8 Creating a Workflow With Notifications

Perform the following steps to create and run a workflow with notifications.

Reference

Oracle Workflow Guide 2.5, See Chapter 3, Defining a Workflow Process and Chapter 4, Defining Workflow Process Components

Prerequisites

None

Responsibility

Workflow Administrator

Navigation

Navigate to **Workflow >Launch Processes**.

Steps

1. In the Launch Processes window, In the Item Type column, click **Document Management**. If you have renamed the item types, this option appears in the Internal Name column as WFDM.

The Initiate Workflow-WFDM page opens.
2. Enter values in the following fields:

- Item Key: Enter your name plus a sequence number (for example, jdoe1001)
 - User Key: You may copy the value in the Item Key field
 - Process Name: Enter Document Review
 - Process Owner: Your logged in user name populates automatically
 - Send Document: Leave blank
 - Document Owner: Select a valid resource name
 - Document Reviewer: Choose one from the list of values
 - Comments: Enter Workflow Verification
 - Response Document: Leave blank
3. Click **OK**.
The Activities List page opens to show workflow statuses. The status of the workflow you just initiated should be Active.
 4. If the status of the workflow is Error, click **Exception** in the Result column to see an explanation of the error.
 5. Click **View Diagram** to see a graphical representation of the workflow process.
Leave the View Diagram window open as you continue to check the workflow.
 6. Save your work.

To Review the Progress of a Workflow

Use the following procedure to verify that the Workflow notification is sent.

Steps

1. Login to your Personal Home Page.
2. In the list of Self Service Apps, choose the Workflow User Web Application responsibility.
3. In the Navigator, choose **Workflow >Find Notifications**.
The Find Notifications page opens.
4. In the Type field, enter Document Management. In the To field, enter the document reviewer.
5. Click **Find**.

The Worklist window opens.

6. Click **Subject** to open the notification.

If you see the notification, then workflow is set up correctly.

7. Click **Approve** to return to the Worklist window.

Further Verification

You may go back to the View Diagram window that you opened earlier. Click **Reload** in the browser window to refresh the contents of the window. After the workflow process completes successfully, you can see a green line from the Start icon to the End (Approve) icon.

2.3.9 Creating a Supplier Contact

Set up suppliers in the Suppliers window to record information about individuals and organizations from whom you purchase goods and services. You can also enter employees whom you reimburse for expense reports. When you enter a supplier that does business from multiple locations, you store supplier information only once, and enter supplier sites for each location. You can designate supplier sites as pay sites, purchasing sites, RFQ only sites, or procurement card sites. For example, for a single supplier, you can buy from several different sites and send payments to several different sites. Most supplier information automatically defaults to all supplier sites to facilitate supplier site entry. However, you can override these defaults and have unique information for each site.

The system uses information you enter for suppliers and supplier sites to enter default values when you later enter transactions for a supplier site. Most information you enter in the Suppliers window is used only to enter defaults in the Supplier Sites window. When the system enters that information in a later transaction, it only uses supplier site information as a default, even if the supplier site value is null and the supplier has a value. If you update information at the supplier level, existing supplier sites are not updated.

When you enter a supplier, you can also record information for your own reference, such as names of contacts or the customer number your supplier has assigned to you. Perform the following steps to create a supplier contact.

Reference

Oracle Public Sector Purchasing User's Guide, Chapter 5, Supply Base Management

Prerequisites

- Verify that the supplier does not exist in the system. Use the Suppliers Report and Supplier Audit Report.
- Define the following lookups in the Oracle Purchasing Lookups window: Pay Group, Supplier Type, Minority Group.
- Define Supplier Types in the Oracle Payables Lookups window.
- If you have installed Purchasing, complete Purchasing setup.
- If you use Oracle Purchasing, define Supplier Types in the Oracle Payables Lookups window.
- If you use Oracle Purchasing, define FOB codes, Minority Groups, and Freight Terms codes in the Oracle Purchasing Lookups window.
- If you use Oracle Purchasing, define Ship Via codes in the Defining Freight Carriers window.

Responsibility

Purchasing

Navigation

Navigate to **Supply Base > Suppliers**.

Steps

1. In the Suppliers window, enter a unique Supplier Name.
2. If the Supplier Number Entry option in the Financials Options window is set to Automatic, Payables automatically enters a Supplier Number for you. If this option is set to Manual, you must enter a unique Supplier Number.
3. (Optional) Enter the supplier's tax identification number in the Taxpayer ID field; for example, an individual's social security number, or a corporation or partnership's federal identification number/federal tax ID.
4. (Optional) Enter the value-added tax (VAT) registration number in the Tax Registration Number field if you are entering a VAT supplier.

If you want to prevent invoice or purchase order entry for this supplier after a certain date, then enter the date in the Inactive On field.
5. Enter supplier information in the appropriate tabs of the Suppliers window.

6. In the Suppliers window, choose the Sites button to navigate to the Supplier Sites window. Enter at least one supplier site name and address.
7. Save your work.

2.3.10 Defining Sales Credit Types

Order Management uses sales credit types to determine if the sales credit for an order is a quota or non-quota amount. Perform the following steps to define sales credit types.

Reference

Oracle Order Management User's Guide, See Chapter 1, Setting up

Prerequisites

None

Responsibility

Order Management Super User

Navigation

Navigate to **Setup > Sales > Credit Types**.

Steps

1. Navigate to the Sales Credit Types window.
2. In the Sales Credit Type window, enter the Credit Type Name and Description for the credit type.
3. Select the Quota check box if the sales credit type applies to revenue quota sales credit that you assign to resources.
4. Select the Enabled check box to activate the sales credit type.
5. Save your work.

2.3.11 Setting Up Accounting Flexfields

Use descriptive flexfields to tailor General Ledger to fit your unique information needs. For example, you may want to collect additional information on budget organizations, such as the manager and the size of the organization. You can even define context-sensitive flexfields that prompt you for additional information based

on your previous entries. Perform the following steps to set up accounting flexfields.

Note: You only need to set up accounting flexfields if you are using the Freight, Revenue, or Receivables Account fields, in the Resource Manager Receivables tab.

Reference

Oracle General Ledger User's Guide, Chapter 9, Setup

Prerequisites

Use the Value Sets window to define any value sets you need.

Responsibility

General Ledger Super User

Navigation

Navigate to **Setup > Financials > Flexfields > Descriptive > Segments**.

Steps

Consult the following manuals for more information:

- *Oracle General Ledger User Guide*
- *Oracle Applications Flexfields Guide*

2.4 Mandatory Dependencies

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

- Oracle Resource Manager

2.5 Conditional Dependencies

- Oracle Order Management or third party collection program
- Oracle Workflow
- Oracle iStore

- Oracle Marketing
- Oracle Sales Online
- Oracle Telesales
- Oracle Payroll
- Oracle Inventory
- Oracle Payables
- Oracle Receivables

Part II

Implementing Oracle Incentive Compensation

This section of the Oracle Incentive Compensation Implementation Guide contains the following chapters:

- [Chapter 3, "Implementation Overview"](#)
- [Chapter 4, "Implementation Tasks for Oracle Incentive Compensation"](#)

Implementation Overview

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

3.1 Process Description

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

3.2 Implementation Task Sequence

The following table describes the order and process of implementing Oracle Incentive Compensation.

Further information detailing the implementation procedures is provided in the sections following the table.

Note: In the Mandatory column, an asterisk (*) next to No means that the step is optional, and is only required if Incentive Planning is used.

Prerequisites

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

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

Steps

Mandatory	Step Number	Oracle Incentive Compensation Implementation Steps
Yes	4.1	General Ledger Setups 4.1.5 Define Period Types 4.1.2 Define Calendar 4.1.3 Define Periods 4.1.4 Define Currency 4.1.5 Define Set of Books Reference: <i>GL Implementation Guide</i> or <i>GL User's Guide</i>
Yes	4.2	System Parameters 4.2.1 Pick Set of Books in Oracle Incentive Compensation 4.2.2 Collection 4.2.3 Calculation 4.2.4 Payment 4.2.5 Income Planner Disclaimer
Yes	4.3	Open/Close GL Periods 4.3.1 Create Period Type 4.3.2 Create Accounting Calendar 4.3.3 Activate Pay Periods
Yes	4.4	Open Accumulation Periods
No	4.5	Define Tables 4.5.1 Define Columns
No	4.6	Define External Table Mapping
Yes	4.7	Define Calculation Expressions 4.7.1 Input Expressions 4.7.2 Output Expressions 4.7.3 Performance Measures 4.7.4 Create Bonus Calculation Expressions
Yes	4.8	Define Rate Dimensions
Yes	4.9	Define Rate Tables

Mandatory	Step Number	Oracle Incentive Compensation Implementation Steps
Yes	4.10	Define Formulas
No*	4.11	Associate Responsibilities with Responsibility Groups
No	4.12	Define Default Contract Text 4.12.1 Workday Calendar
No*	4.13	Define User Access
No*	4.14	Define Quota Components 4.14.1 Edit Computed Component Formula
No*	4.15	Define Attainment Schedule 4.15.1 Seasonality Schedule
Yes	4.16	Define Roles Reference: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation Concepts and Procedures</i> (Resource Manager)
Yes	4.17	Define Agreement Details
No*	4.18	Define Jobs Reference: Appropriate sections <i>HRMS Implementation Guide</i> or <i>HRMS User's Guide</i> (Resource Manager)
No*	4.19	Associate Jobs with Roles
Yes	4.20	Define Resource Groups (Compensation Groups) Reference: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation Concepts and Procedures</i> (Resource Manager)
Yes	4.21	Define Resources 4.21.1 Set up Resources for Team Compensation Reference: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation Concepts and Procedures</i> (Resource Manager)
Yes	4.22	Assign Resources to Roles and Groups Reference: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation Concepts and Procedures</i> (Resource Manager)
No*	4.23	Assign Roles to Job Titles
No*	4.24	Assign Job Titles to Resources
No*	4.25	Customize On Target Earnings and Anchors

Mandatory	Step Number	Oracle Incentive Compensation Implementation Steps
No*	4.26	Assign and Distribute Quotas to Resources 4.26.1 Email Alert Messages 4.26.2 Workflow Background Process
No*	4.27	Resources Accept Plans using Oracle Sales Online
Yes	4.28	Activate Pay Periods
Yes	4.29	Define Pay Groups
No	4.30	Set Up Collections 4.30.1 Set up a New Transaction Source 4.30.2 Source Tables 4.30.3 Queries 4.30.4 Set up Collection Mapping 4.30.5 Direct Mapping 4.30.6 Indirect Mapping 4.30.7 Actions 4.30.8 Generate 4.30.9 Run Collections 4.30.10 Set Up a Standard Transaction Source 4.30.11 Use Filters 4.30.12 Receivables Posting and Order Booking Special Features 4.30.13 Order Booking 4.30.14 Adjustments
No	4.31	Set Up Expense and Liability Account Mapping 4.31.1 Account Generator
No	4.32	Set Up Plan Element to Oracle Payroll Pay Element Mapping 4.32.1 Pay Element Input Values Mapping
Yes	4.33	Map Classification Attributes and Collection Attributes. Referred to in Oracle Incentive Compensation as "Tables".
Yes	4.34	Define Revenue Classes
Yes	4.35	Define Revenue Class Hierarchy

Mandatory	Step Number	Oracle Incentive Compensation Implementation Steps
Yes	4.36	Define Classification Rule Sets for Revenue Classification 4.36.1 Build a Rules Hierarchy
No	4.37	Define Interval Types (optional)
No	4.38	Define Credit Types (optional) 4.38.1 View, Change, or Remove a Credit Type 4.38.2 Add a New Credit Type
Yes	4.39	Define Plan Elements 4.39.1 Assign Revenue Classes 4.39.2 Accelerators and Transaction Factors 4.39.3 Assign Rate Tables
Yes	4.40	Define Compensation Plans 4.40.1 Compensation Plan Details 4.40.2 Assign Plan Elements
Yes	4.41	Define Roles Reference: Appropriate sections of <i>CRM Foundation Concepts and Procedures</i> (Resource Manager)
Yes	4.42	Define Compensation Groups (Resource Groups) Reference: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation Concepts and Procedures</i> (Resource Manager)
Yes	4.43	Define Resources Reference: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation Concepts and Procedures</i> (Resource Manager)
Yes	4.44	Assign Resources to Roles and Groups
Yes	4.45	Assign Compensation Plans to Roles
No	4.46	Define Payment Plans (optional)
Yes	4.47	Assign Pay Groups to Resources
No	4.48	Assign Payment Plans to Resources (optional)
No	4.49	Customize Quota and Rates for Resources (optional)

Mandatory	Step Number	Oracle Incentive Compensation Implementation Steps
No	4.50	<p>Reports</p> <p><i>Incentive Planning Reports</i></p> <ul style="list-style-type: none"> 4.50.1 Quota Modeling Summary 4.50.2 Average Quota Report 4.50.3 Quota Overassignment Report 4.50.4 Quota Range Report 4.50.5 Compensation Contract Status 4.50.6 Overlay Report 4.50.7 Vacancy Report 4.50.8 Transition Report 4.50.9 Plan Activation Status Report 4.50.10 Role to Compensation Plan Mapping Report <p><i>Compensation Reports</i></p> <ul style="list-style-type: none"> 4.50.11 Year to Date Summary 4.50.12 Transaction Details 4.50.13 Compensation Group Hierarchy 4.50.14 Classification Rules Report 4.50.15 Commission Summary Report 4.50.16 Quota Performance 4.50.17 Commission Statement 4.50.18 Unprocessed Transactions

Implementation Tasks for Oracle Incentive Compensation

Perform the following tasks to implement Oracle Incentive Compensation:

- [Section 4.1, "General Ledger Setups"](#)
- [Section 4.2, "System Parameters"](#)
- [Section 4.3, "Open and Close GL Periods"](#)
- [Section 4.4, "Open Accumulation Periods"](#)
- [Section 4.5, "Define Tables"](#)
- [Section 4.6, "Define External Table Mapping"](#)
- [Section 4.7, "Define Calculation Expressions"](#)
- [Section 4.8, "Define Rate Dimensions"](#)
- [Section 4.9, "Define Rate Tables"](#)
- [Section 4.10, "Define Formulas"](#)
- [Section 4.11, "Associate Responsibilities with Responsibility Groups"](#)
- [Section 4.12, "Define Default Contract Text"](#)
- [Section 4.13, "Define User Access"](#)
- [Section 4.14, "Define Quota Components"](#)
- [Section 4.15, "Define Attainment Schedule"](#)
- [Section 4.16, "Define Roles"](#)
- [Section 4.17, "Define Agreement Details"](#)

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- Section 4.18, "Define Jobs"
 - Section 4.19, "Associate Jobs with Roles"
 - Section 4.20, "Define Resource Groups (Compensation Groups)"
 - Section 4.21, "Define Resources"
 - Section 4.22, "Assign Resources to Roles and Groups"
 - Section 4.23, "Assign Roles to Job Titles"
 - Section 4.24, "Assign Job Titles to Resources"
 - Section 4.25, "Customize On Target Earnings and Anchors"
 - Section 4.26, "Assign and Distribute Quotas to Resources"
 - Section 4.27, "Resources Accept Plans Using Oracle Sales Online"
 - Section 4.28, "Activate Pay Periods"
 - Section 4.29, "Define Pay Groups"
 - Section 4.30, "Set Up Collections"
 - Section 4.31, "Set Up Expense/Liability Account Mapping"
 - Section 4.32, "Set Up Plan Element to Oracle Payroll Pay Element Mapping"
 - Section 4.33, "Map Classification Attributes and Collection Attributes"
 - Section 4.34, "Define Revenue Classes"
 - Section 4.35, "Define Revenue Class Hierarchy"
 - Section 4.36, "Define Classification Rulesets for Revenue Classification"
 - Section 4.37, "Define Interval Types"
 - Section 4.38, "Define Credit Types"
 - Section 4.39, "Define Plan Elements"
 - Section 4.40, "Define Compensation Plans"
 - Section 4.41, "Define Roles"
 - Section 4.42, "Define Compensation Groups"
 - Section 4.43, "Define Resources"
 - Section 4.44, "Assign Resources to Roles and Groups"
 - Section 4.45, "Assign Compensation Plans to Roles"

- [Section 4.46, "Define Payment Plans"](#)
- [Section 4.47, "Assign Pay Groups to Resources"](#)
- [Section 4.48, "Assign Payment Plans to Resources"](#)
- [Section 4.49, "Customize Quota and Rates for Resources"](#)
- [Section 4.50, "Reports"](#)

4.1 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*, Chapter 9, Setup.

Responsibility

System Administrator

4.1.1 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, such as six weeks or fiscal year.

4.1.2 Define Calendar

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.

4.1.3 Define Periods

After you have defined your calendar, you need to add periods to it in General Ledger.

4.1.4 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).

4.1.5 Define Set of Books

Oracle Incentive Compensation requires that a set of books be set up in General Ledger. The set of books includes a chart of accounts, functional currency, calendar, and period types. A set of books can be used for your entire company or different sets of books can be set up for different divisions or locations.

4.2 System Parameters

Now that you have defined these in Oracle General Ledger, you need to identify this information in Oracle Incentive Compensation on the System Parameters page. Navigate to Administration > Incentive > Parameter to perform steps 5.2.1 through 5.2.5.

4.2.1 Pick a Set of Books in Oracle Incentive Compensation

A set of books identifies a company or fund within Oracle Applications that shares a common chart of accounts, structure, calendar, and functional currency. Oracle Incentive Compensation 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*, Chapter 9, Setup).

Prerequisites

The set of books must be defined in Oracle General Ledger (GL) using these forms:

- Set of Books
- Calendar
- Period Types

- Open and Close Periods
- Key Flexfields

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Parameter

Steps

1. In the Set of Books field, choose a GL set of books from the list of values, which Oracle Sales Compensation obtains from all sets of books you have defined.

You will then see this information obtained from the GL 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)

4.2.2 Collection

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Parameter

Steps

1. Select a collection batch size. This affects the amount of time the application requires to process the total transactions.
2. Select the number of takeback grace days. This determines the number of days allowed after the payment due date before sales credit is taken back.

Note: The Transfer Batch Size field is obsolete. It will be removed in a future release.

4.2.3 Calculation

Within the Calculation area of the System Parameters page, there are five fields. Four of the fields may affect calculation and its performance: Transaction Batch Size, Latest Processed Date, Resource Batch Size, and Managerial Rollup. A fifth field included under calculation, 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 Resource Batch Size together determine how many transaction batch runners get submitted for calculation. During the transaction batch processor phase, calculation 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 a PHYSICAL_BATCH_ID based on the transaction batch size and salespeople batch size as defined on the System Parameters page. During the assignment, calculation moves through each of the salesrep_id sequentially (for example, 1000, 1001, 1002, 1010, and so on).

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 resource 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 Latest Processed Date field is a view-only field that indicates the date of the latest transaction for which calculation has been run. If the system profile OSC: Prior Adjustment is set to no, 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 check 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 cannot selectively allocate indirect credit on a transaction-by-transaction basis.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Parameter

Steps

1. Configure a transaction batch size that is appropriate to your calculation requirements.
2. Configure a resource batch size that is appropriate to your calculation requirements.
3. Check the Managerial Rollup check box if you want sales credits to roll up through the compensation group hierarchies.

4.2.4 Payment

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Parameter

Steps

1. Indicate whether Oracle Payable and Payroll are implemented.
2. Use the Account Generation field to instruct the application from what level you want account codes to be generated. Select Revenue Class, Plan Element, Custom, or Classification from the drop-down list.

Guidelines

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 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.

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.

4.2.5 Income Planner Disclaimer

Income planner enables resources to plan their sales volumes to reach their commission earning goals. However, an organization can add a disclaimer to what resources see when they use Incentive Planner in Oracle Sales Online. A typical disclaimer warns the user that amounts generated using Income Planner may not match the exact amount of commission paid.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Parameter

Steps

1. In the Income Planner area, type the information that you want to be displayed into the Disclaimer field.
2. Click **Update**.

4.3 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.

4.3.1 Create Period Type

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. To create a period type, perform the following procedure:

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > General > Calendar Type

Steps

1. Click the Administration tab and click the General subtab.
2. Click **Calendar Type** in the side panel menu.
The Calendar Types page appears.
3. If the period type you need is already defined, proceed to the next step. You can use the search parameters at the top of the page to find a specific period type.
4. To create a new period type, enter it in the first available blank field in the Period Type column.

5. Enter the number of periods per year in the Periods Per Year column.
6. Select Calendar or Fiscal from the drop-down list in the Year Type column.
7. Optionally, enter a description of the period type.
8. Click **Update** to save your work.

4.3.2 Create Accounting Calendar

The accounting calendar contains the exact date ranges for all the periods in a specific calendar or fiscal year. To set up an accounting calendar, perform the following procedure:

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > General > Accounting Calendar

Steps

1. Click the Administration tab and click the General subtab.
2. Click **Accounting Calendar** in the side panel menu.
3. The Accounting Calendar page appears.
4. Use the search parameters as needed at the top of the page to locate a specific calendar type. Select a calendar type from the Calendar drop-down list. Accounting is the default setting for the Calendar field, which is a required field.
5. In the first available blank field in the Prefix column, enter the prefix you want to use for a period. For a month, it is usually the abbreviation, such as Jan for January. For a year, it can be FY-02 or something similar. This field is required.
6. In the Type field, select a type from the drop-down list. This field is required.

7. Enter the year, month, and number in the next three fields. All three are required. Number indicates the sequence of the period. For monthly periods, for example, enter 4 for April, 8 for August, and so on.
8. Enter dates in the From and To columns. Click the calendar icon to open a calendar from which you can select the dates you need. These fields are required.
9. The Name field is required, but it is automatically populated by the application. You may see a message displayed mentioning that the field is required.

By default, the application builds the contents of the Name field by combining the data in the Prefix column with the year suffix and hyphenating them. You can customize the Name field by entering a different name in the field and clicking **Update**.
10. Click **Update** to save your work. To return to the previously saved information, before saving, click **Restore**.

4.3.3 Activate Pay Periods

To activate pay periods, perform the following procedure:

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Pay Periods

Steps

1. Click the Administration tab and the Incentive subtab.
2. In the side panel menu, click **Pay Periods**.
The Pay Periods page appears.

3. In the Period Status column, select Active from the drop-down menu next to the period you want to activate.
4. Click **Update** to save your changes.
5. Note:

4.4 Open Accumulation Periods

Use the Accumulation Periods page to set the status of your accumulation periods, or freeze them to enable them to be opened for a year-to-date summary for a resource using Oracle Sales Online.

Most of the Accumulation Periods page is read-only information. The System Status, Calendar, and Period type fields at the top display information that was set previously.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Accumulation Period

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click the Accumulation Period link in the side panel menu.
The Accumulation Periods page appears.
3. Select a year from the drop-down list. Click **Apply**.
The accumulation periods for the selected year are displayed.
4. For each period, choose a period status from the drop-down list:
 - Never Opened

- Future - Entry
 - Permanently Closed
 - Open
 - Closed
5. Check the Freeze check box if you want to use the data in a Year To Date Summary report.
 6. Click **Update** to save your changes. If necessary, click **Restore** before clicking **Update** to return to the most recently saved information.

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 2002 period if the March 2002 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.

4.5 Define Tables

Use the Tables page to define tables from Accounts Receivable, Order Management, or an external source that are used in collecting and calculating transactions in Incentive Compensation. Tables must be defined before they can be used in collection or calculation.

Prerequisites

Tables must exist in the database.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Tables

Steps

1. Click the Administration tab and click the Incentive subtab.

2. On the side panel menu, click **Tables**.

The Tables page appears.

3. If you want, enter search parameters by Schema, Table Name, or User Name.

4. Click **Apply**.

To enter new Tables, perform the following procedure.

1. Enter a Schema in the Schema field. Click **Go** to open a pop-up list from which to select a name.

2. Enter a Table Name from which you want to collect data. Use the pop-up list if necessary.

3. Enter a user name.

4. Enter a description if desired.

5. In the Usage column, select Collection, Calculation, or None from the drop-down list.

6. Click **Update** to save your work.

7. Use the details field to add any useful information. Click **Columns** in the details column to go to the Columns page.

8. If necessary, click **Restore** to return to the previously stored information.

9. Click **Update** to save your work.

4.5.1 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.

There are four views of the Columns page, selected from the View drop-down list at the top of the page. The four views have different fields of information that can be entered.

- The Columns view displays the column's data type and data length, and contains check boxes for Usage and Foreign Key.
- The Dimensions view contains a field for Dimension Name and a Value check box.
- The Classification view provides a Value check box, enables classification as alphanumeric, date, or numeric, and contains a field for selecting a value set name.
- The Primary Key view supplies a Primary Key check box. The Position column is not used in the current release.

All four views contain the column name, the user name assigned to it, and a field for an external call. The external call column is used only in the Column view. 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 enables you to optionally enter the name of a jsp, which is then invoked by Oracle Incentive Compensation as the source of data for the Invoice Number and Order Number fields in the Commission Statement report. For the Commission Statement drilldown to work, the Enable Commission Statement Drilldowns profile should be set to Yes.

Also, the standard integrations must be set up.

Prerequisites

None

Responsibility

Incentive Planning Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Tables > Columns link

Steps

1. The Columns view is the default display. To use a different view, select it from the View drop-down list.
2. To use the Columns view, click **Apply**.
The Columns page display changes to the view you have selected.
3. For the Columns view, perform the following steps:
 - a. Change the name in the User Name field to assign a name that is used in your business or is easy to understand.
 - b. Optionally, enter an external call (see previous information in this section).
 - c. The Data Type field indicates if the column contains alphanumeric material (VARCHAR2), numerical data (NUMBER), or a date (DATE).
 - d. Check the Usage check box if you plan to use the column for calculation.
 - e. Check the Foreign Key check box if you plan to use the column as a foreign key to relate the column to columns in another table.
 - f. Click **Update** to save your changes. If necessary, click **Restore** to return to the previously stored information.
4. For the Dimensions view, perform the following steps:
 - a. Change the name in the User Name field to assign a name that is used in your business or is easy to understand.
 - b. Select a dimension name. Enter four or more characters in the Dimension Name field and click **Go**. A pop-up list appears from which you can make a selection.
 - c. Check the Value check box next to the column to use that column's value as the basis for defining the hierarchy of the selected dimension.
 - d. Click **Update** to save your changes. If necessary, click **Restore** to return to the previously stored information.
5. For the Classification view, perform the following steps:
 - a. Change the name in the User Name field to assign a name that is used in your business or is easy to understand.

Steps

1. Click the Administration tab and click the Incentive Subtab.
2. Click **External Table** on the side panel menu.

The External Table Join Conditions page appears.
3. If the list is long, you can search for a join condition by entering a search string in the Name field at the top and clicking **Apply**. *Note: This search is case sensitive.*
4. Enter a name for the condition in the Name column. This is a required field.
5. In the Usage column, select Collection or Calculation from the drop-down list. This is a required field.
6. Enter the source table. You can enter four or more characters in the field and click **Go** to open a pop-up list. Click your selection to enter it into the field.
7. Enter a name of the destination table in Oracle Incentive Compensation. You can enter four or more characters in the field and click **Go** to open a pop-up list from which to make a selection.
8. Click **Update**.

The Alias is system generated and the Columns link appears in the External Columns column.
9. Click **Columns** in the External Columns column to another page where you can specify source and destination columns.
10. If you want to remove a line, check the Remove check box and the line will be deleted the next time Update is clicked.
11. If necessary, click **Restore** to return to the previously saved information.
12. Click **Update** to save your changes.

4.7 Define Calculation Expressions

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

A compensation plan is built from plan elements and is assigned an effective start and end date. The plan can then be assigned to multiple sales roles.

There are 100 user definable column attributes. 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.

As part of the definition process you can select columns from a list of table columns on the Expressions subtab of the Incentive tab to create expressions. Once they have been saved the expressions can be assigned and reassigned to any number of formulas you need.

When defining a formula, you select a valid expression from a drop-down list at each of the areas for input, output, and performance measure on the Expressions page.

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

4.7.1 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. Think of the input expression as a sorter for all incoming transactions for Oracle Incentive Compensation. An example input formula expression looks like this:

`(TRANSACTION_AMOUNT*EVENT_FACTOR)/TARGET`

For example, as a condition, a company can establish that its sales force will be compensated based on transaction amount. The input expression will merely state that transactions will be sorted by TRANSACTION_AMOUNT from the CN_COMMISSION_HEADERS column.

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 input expression created matches the above transaction of \$100 with the rate table and determines that 5% will be paid on this order.

4.7.2 Output Expressions

Outputs of the formula 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.

In this example above, business users determined that the resources will be paid based on the rate table result, transaction amount, and a constant uplift/accelerator factor of 1.035. Users will need to tell Oracle Incentive Compensation in which columns this information resides and then apply the calculations.

Example of an output expression:

Rate Table Result * (TRANSACTION_AMOUNT * PAYMENT_FACTOR)

Using the above output expression, multiply 5% times the transaction amount (\$100), event factor of 100% and 1.035 for the payment accelerator or payment uplift. The 5% is multiplied by the result of the sum in the brackets. If the payment factor is 1.05, then the result or commission is \$5.25 ($\$100 \times 5\% \times 1.05 = \5.25).

4.7.3 Performance Measures

A performance measure can be an accumulation of transaction values that are captured by the plan element to which it is assigned. Performance measures serve as a mechanism to gather cumulative information by plan element and group them for use in reports that compare achievements to quota, goal and performance measure.

An example of a performance measure is revenue. You can select and define the columns where revenue information for transactions is held. 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 when using an input expression that is not numeric to assign a numeric performance measure.

Use the following procedure to define calculation expressions.

Prerequisites

Table and column mapping is complete.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Expression > Create

Steps

1. Click the Incentive tab and click the Expression subtab.
The Calculation Expressions page displays a list of already created calculation expressions.
2. To create a new calculation expression, click **Create**.
The Calculation Expressions page with blank fields appears.
3. Enter a unique name for the expression. This is a required field.
4. Optionally, provide a description for the expression.
5. The status of the expression in the read-only field is Invalid until it is saved.
6. Select a Type from the drop-down list. The seven selections represent groups of calculation elements, such as expressions, formulas, and SQL functions. Only the calculation elements in that selection are displayed in the Calculation Values box.
7. In the Calculation Values box, select the column to be used in the expression.

8. Click the right shuttle box arrow button to move the element in the Calculation Values box into the Expression box. You can click the left-arrow button to remove an entry from the Expression box.
9. If your expression requires it, select an operand from the row below the Expression box. It appears immediately in the Expression box without using the right arrow button.

To remove an item from the Expression box, click the left arrow button.

10. Optionally, numeric constants or string values can be added to an expression. Enter the numeric value or string value in the Constant field and click the right arrow button to move it to the Expression box. As above, click the left arrow button to remove an entry from the Expression box.
11. Add elements and operands until the desired expression has been created.
12. To use values from another plan element or to create an interdependent plan element, enter the name of the plan element in the Plan Element field.
13. Select from the list of metrics next to the Plan Element field. Use the right shuttle box arrow to add the plan element and metric to the expression. See Guidelines.
14. Add elements and operands until the desired expression has been created.
15. Click **Update** to save and compile your expression. Optionally, click **Restore** to return to the previously saved information.

The status of the expression should read Valid if it has compiled properly.
16. The usage of the expression is also displayed after the expression is saved. The usage rules determine where the expression may be applied.

Guidelines

User table names are listed under External Elements. You join an external table to an internal table by mapping them using Administration > External Tables.

Selected columns are accessible for use in building formulas and performance measures. The user column name is listed rather than the actual column name.

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
- CN_COMMISSION_LINES

- CN_SRP_QUOTA_ASSIGNS
- CN_SRP_PERIOD_QUOTAS
- CN_QUOTAS

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

- CN_SRP_PERIOD_QUOTAS
- CN_SRP_PLAN_ASSIGNS
- CN_SRP_QUOTA_ASSIGNS
- CN_SALESREPS

An output expression cannot contain both ITD_TARGET and ITD_PAYMENT.

4.7.4 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 achievement, 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. See ["Formula Bonus"](#) for more information.

However, if you want to calculate bonuses based on the accumulated total sales credit for the resource, you can perform the following procedure.

1. Run a SQL script to create a view. (Refer to SQL documentation).
2. Register this view on the Tables page. See [Section 4.5, "Define Tables"](#) for steps.

3. On the External Table page, enter a name (user definable) See [Section 4.6, "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:
 - Salesrep_id > Salesrep_id
 - period_id > period_id
6. Define input/output expression using commission_paid_ptd or input_achieved_ptd of the view depending upon the requirement.
This view will appear under external element. You can also define performance expression using input_achieved_ptd.
7. Use the bonus expression when you define the bonus plan formula.

Example

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
10,000-9999999999	25

- Bonus Plan element Interval = Period.

The resource has the following transactions:

Date	Transaction Amount
01-Jan-01	9,000
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

Period-id	Input_achieved_ptd	Commission_paid_ptd
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:

```
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, contracts b
where a.quota_id = b.quota_id
and a.period_id between 2001001 and 2001012
and b.incentive_type_code = 'COMMISSION'
group by salesrep_id, ceil((a.period_id - 2001000)/3)
```

Please note that a view created based on `CN_COMMISSION_HEADERS` will not work. However, the requirement can be achieved using view created based on `cn_srp_period_quotas`.

4.8 Define Rate Dimensions

Rate dimensions define the tiers that are used in a rate table. There are four kinds of rate dimensions:

- Amount: The rate tiers are quantities.
- Percent: The rate tiers are percentages of a quota.
- Expression: The rate tiers use an expression that has already been defined.
- 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 Amount or Percent dimensions on the Dimensions page from a drop-down list.

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

Note: This version of Oracle Incentive Compensation does not support accumulated revenue with multidimensional rate tables.

In the following example, three dimensions are used to calculate various commission rates: License Revenue (percent of quota), State, and Product. The formula first compares transaction revenue with the first dimension, License Revenue. Next, the formula compares transaction location with the second dimension, State. Finally, the formula compares product identification with the third dimension, Product.

A dimension contains rate tiers to establish different levels of achievement to be compensated at different rates. In this example, two dimensions have two tiers and one has three, but any number can be defined.

The License Revenue dimension:

License Revenue
0-100
100-9,999

The State dimension:

State
Arizona
California
Oregon

The Product dimension:

Product
PCs

Product

Peripherals

Together, there are 12 possible combinations, and each one can be assigned a different commission rate.

Your minimum and maximum values in the Rate Tiers section must be stated in terms consistent with your input information.

You can change both the tiers and rates for a rate table. Any changes you make are propagated to all plan elements to which those rate tables are assigned, and thus to any resources that are assigned to roles that are assigned plans containing those plan elements. If you change the levels of quota achievement in a tier, or add or delete a tier in a rate table, those changes propagate to all resources, regardless of whether their plans have custom quotas or rates.

The following table shows four columns of a Dimension and Rates Example. Columns are License Revenue, State, Product, and Rate. Product is chosen as the base dimension. There are 6 possibilities for each of the two tiers in the License Revenue dimension, including all combinations with the other two dimensions.

License Revenue	State	Product	Rate
0-100	Arizona	PCs	1%
0-100	Arizona	Peripherals	5%
0-100	California	PCs	1.5%
0-100	California	Peripherals	4.5%
0-100	Oregon	PCs	1.25%
0-100	Oregon	Peripherals	6.25%
100-9,999	Arizona	PCs	4%
100-9,999	Arizona	Peripherals	8%
100-9,999	California	PCs	4.5%
100-9,999	California	Peripherals	7.5%
100-9,999	Oregon	PCs	4.25%
100-9,999	Oregon	Peripherals	9.25%

Prerequisites

For an expression type dimension, the expressions must already be defined.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Rate > rate table link

Steps

1. Click the Incentive tab and click the Rate subtab.
The Rate Tables page appears.
2. Click the name of the rate table for which you want to create or edit a dimension.
The Rate Table Details page appears.
3. In the Dimension area, click **Details** next to any already created dimensions to open the Rate Table Detail - Dimensions page. It contains the rate tiers assigned to the dimension.
4. To create a new dimension, click **Create**.
The Dimension page opens. The fields are blank.
5. On the Dimensions page, for a new dimension, enter a name in the Name field. If you are editing an existing dimension, be sure the field contains the name of the dimension on which you want to work.
6. Select or verify the type from the drop-down list.
7. Optionally, enter a description.
8. In the Rate Tiers area, enter numbers in the From and To columns to create rate tiers. Follow the sequence, and do not leave any gaps between the tiers.
9. If you want to add a tier, use the blank fields at the bottom of the table.
10. To delete a tier, click the Remove check box next to the tier and click **Update**.
11. If necessary, click **Restore** to return to the previously saved information.

12. Click **Update** to save your work.
13. Click **Back** to return to the Rate Table Details menu, where you can assign the dimension you created to the rate table.

Guidelines

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.

If you do not want non-matching transactions to receive 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.

Note: 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.

4.9 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.

The Rate subtab contains a side panel menu that provides links to several pages. After you have chosen a rate table, click the links to see the following:

- Summary: Lists all rate tables that have been created
- Detail: Displays details of the rate table you selected
- Commission Rates: Displays the commission rates for the selected rate table
- Formulas: Displays the formulas to which the rate table is assigned
- Plan Elements: Displays the plan elements in which the rate table is used

Amount type rate tables base compensation on amount of sales volume. Percent type rate tables are based on percentage of goal achieved.

To define rate tables, perform the following procedure:

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Rate > Create

Steps

1. Click the Incentive tab and click the Rate subtab.
The Rate Tables page appears
2. Click **Create**.
The Rate Table Details page appears.
3. In the Name field, enter a unique name for the rate table.
4. Select a Rate Table type, either Amount or Percent, from the drop-down list.
5. Click **Update** to save your work.
6. To add an already created dimension to the rate table, on the Rate Table Details page, enter four or more characters in the Dimension Name field and click **Go** to open a pop-up list. See Guidelines.
7. Select a rate dimension from the list.
8. To assign or change commission rates, click the Commission Rates link to go to the Rate Table Details - Commission Rates page.
9. To create a new dimension, on the Rate Schedule Detail page, click **Create**.
The Dimensions page appears.

10. After you have assigned the dimensions you need to the rate table, click **Update** to save your work. If necessary, click **Restore** to return to the previously saved information.

Guidelines

If a rate schedule 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 schedule that is already assigned.

4.10 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 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 the Guidelines section of Define Calculation Expressions for more information on the types of calculation expressions that you can use for commission and bonus formulas.

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

To create formulas, perform the following procedure.

Prerequisites

Expressions must be created first.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Formula > Create

Steps

1. Click the Incentive tab and click the Formula subtab.
The Formulas page appears.
2. Click **Create** to create a new formula.
The Formula Definition page appears.
3. In the General area, enter a unique name and a description for your formula.
The Name field is required.
4. Enter Commission or Bonus from the Type drop-down list. This is a required field. (See Guidelines)
5. In the Rules area, select Individually or Group from the Apply Transactions drop-down list. This is a required field. (See Guidelines)
6. Make a selection from the Split drop-down list: No Split, Proportional, or Non-Proportional. This is a required field. (See Guidelines)
7. Check the Cumulative check box if you want to aggregate the transactions. (See Guidelines).
8. Check the Interval To Date check box if you want to base the calculation on a period different from the plan element interval. (See Guidelines)
9. Check the Planning check box if this formula is used for plan modeling purposes.
10. Click **Generate** to save your work. You can click **Update** to save changes, or Restore to return to the previously saved information.
11. Click the Expressions link on the side panel menu.
Expressions page appears.
12. In the Input area, select an expression from the drop-down list to represent your formula input. 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.
13. Assign a forecast, if desired.
14. Click the eraser icon in the Remove column to delete an expression from the formula.
15. In the Output area, select an expression from the drop-down list.
16. As with the input expression, you can select a forecast from the drop-down list.

17. In the Performance Measure area, select an expression from the drop-down list. The performance measure, as well as the quota, is used in reports for comparison with achievement.
18. Click **Update** to save your work. If you saved the expression before, you can click **Restore** before you click **Update** to return to the previously saved version.
19. Click the Rate Tables link on the side panel menu to assign a rate table to the formula.
The Rate Tables page appears.
20. Click **Go** in the first blank field in the Name column to open a pop-up box. Select a rate table and click it.
21. Enter an effective start date and end date. You can view the rate table details and rates by clicking **Rate Table Details**.
22. 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 will change from Incomplete to Complete.
23. Click **Update** to save.

Guidelines

A Bonus Formula is a type of Formula where there are no links or references to transactions. See the Guidelines section of Define Calculation Expressions for more information. Also see "[Formula Bonus](#)".

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. For example, the 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.

Select the Cumulative check 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.

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

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

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 when using an input expression that is not numeric to assign a numeric performance measure.

Dependency Notes

Formula Commission

1. 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).
2. Group by Interval for Transactions can only be used with Cumulative. Split options are selectable (each is mutually exclusive).

Formula Bonus

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:

- Quotas are set each period

- Quotas are set cumulatively within the interval
- Performance to date is to be compared to the quota to date

4.11 Associate Responsibilities with Responsibility Groups

Oracle Incentive Compensation uses responsibilities for Incentive Planning. For example, in Incentive Planning, an analyst creates agreements while 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 with 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 four available responsibility groups are Super User, Finance Manager, Contract Approver, and Sales Manager. 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

Prerequisites

None

Responsibility

System Administrator

Navigation

Forms Instance > Profile > System

Steps

1. Log in to the Forms instance.
2. Select the System Administrator responsibility.
The Navigator - System Administrator window opens.
3. Double-click **Profile**.
4. Under Profile, double-click **System**.
The Find System Profile Values window opens.
5. Check the Responsibility check box.
6. Enter Incentive in the Responsibility field. Click **Find**.
The Responsibilities window opens.
7. Select Incentive Planning Analyst. Click **OK**.
8. In the Find System Profiles window, enter OSC%Resp% in the Profile field.
The System Profile Values window opens.
9. 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** in the list of values window.
10. Repeat steps 7 through 9 for each of the three other responsibilities as shown above.
11. Close the window.

4.12 Define Default Contract Text

Use this page to customize and define the text that accompanies the Compensation Plan. The contract text and displayed components can be defined at a company level, as well as at the agreement level.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Settings

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Settings** in the side panel Menu.
The Settings page appears.
3. Select a Transaction calendar from the drop-down list. You can choose from Five Day Week or a Six Day Week.
4. Enter the title of the contract in the Contract Title field.
5. Enter the Eligibility Rules in the Club Qualification text box.
6. Enter the Terms & Conditions of the Compensation Plan.
7. Enter the Approver's details in the Approver section.
8. If necessary, click **Restore** to retrieve the last saved set of information.
9. Click **Update** to save your work.

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 will be generated later.

The Approver's details will appear at the bottom of the Compensation Plan as well.

The contract text hold approximately 1,000 characters.

4.12.1 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 2002 lists only the workdays in the United States for the calendar year 2002. The holidays vary from country to country, from state to state and even from organization to organization.

Workday calendars are useful for calculating compensation based on the exact number of workdays in a given month. A calendar's duration can be defined to match your organization's financial year. You need to assign a new workday calendar every year as the dates of weekends and many holidays change from year to year.

To view or change the workday calendar that is assigned to a particular compensation plan, perform the following procedure.

Prerequisites

The profile option OSC: Use Work Day Calendar must be set to Yes.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > General > Transaction Calendar

Steps

1. Click the Administration tab.
The General subtab appears automatically.
2. Click Transaction Calendar in the side panel menu.
The Transaction Calendar page appears, listing all transaction calendars that have been defined.
3. To modify the days of the week of an existing transaction calendar, check or uncheck the appropriate check boxes. To modify exact dates, see step 8.

4. To create a new transaction calendar, enter the name of the new calendar in the first empty name field.
5. Optionally, enter a description.
6. Check the check boxes for the days of the week that you want to designate as workdays in the transaction calendar.
7. Click **Update** to save your work. Before clicking Update, you can return to the previously saved settings by clicking **Restore**.
8. To define the exact dates of holidays or additional work days, click the transaction calendar link in the Name column.

A different Transaction Calendar page appears. This page lists each date as a separate row, containing the calendar date, day of the week, and a Business Day check box. See Guidelines for more details.

9. Check the check box next to any date that you want to set as a business day.
10. Uncheck the check box next to any date that you want to designate as a holiday.
11. Click **Update** to save your work. Before clicking Update, you can return to the previously saved settings by clicking **Restore**.

Perform the following procedure to complete setup of a transaction calendar.

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Select **Settings** from the side panel menu.
The Settings page appears.
3. Select a transaction calendar from the drop-down list.
4. Click **Update** to save your changes. Before clicking Update, you can return to the previously saved settings by clicking **Restore**.

Guidelines

This 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, use the drop-down list and select the area that is approximately where you want to work. Then, use the Previous and Next links to get to the exact dates you need.

If you use the Search field, the application displays only the single day you requested.

4.13 Define User Access

The User Access functionality defines to which Incentive Planning group a user with Incentive Planning Finance Manager has access. In order for a finance manager to view or modify planning data for an incentive planning group, the access must be explicitly defined. Use the User Summary page to select a User. After that, enter specific information on the User Access Detail page to make alterations to the selected User's access privileges.

Prerequisites

Users must be assigned Incentive Planning Financial Manager responsibility to appear on the User Access screen.

Responsibility

Incentive Compensation Super User

Navigation

Administration > Incentive > User Access

Steps

1. On the Administration tab, click **Incentive**.
2. Click **User Access** on the side panel menu.
The User Access page opens.
3. Select a User by clicking on the name.
The User Access Details page opens.
4. On the User Access Details page, enter a compensation group in the Compensation Group column, or click **Go** to select one from the pop-up menu.
Only groups with a usage of "Sales Force Planning" can be selected from the list of values.
5. In the Organization column, select an organization from the drop-down list.
6. Select an access level of Update or View from the drop-down list.
7. If necessary, click **Restore** to return to the most recently saved information.

8. Click **Update** to save your changes.

4.14 Define Quota Components

Components are parts of an agreement that is created in Incentive Planning that capture specific agreement data, such as salary and quota amounts. The components can be of three types: Fixed, Variable Quota Based, or Variable Non-Quota Based. Variable components are further classified as computed or non-computed components. A computed component takes other variable components as inputs to its definition. Fixed pay components do not change from period to period, for example, Salary or Car Allowance. Variable pay components change depending on sales activity and are associated with commission rather than salary or expenses. Variable pay components can be based on a quota or be nonquota based.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Component

Steps

1. Click the Administration tab and click the Incentive subtab.
2. In the side panel menu, click Component.
The Quota Components page appears.
3. Use the search parameters to find an existing component.
 - a. Enter one or more characters in the Name field to narrow your search. Or, leave the percent sign (%) to display all components matching the other parameters you select.
 - b. Select one of five types from the Type drop-down list.

- c. Select Unit or Revenue from the Unit drop-down list.
 - d. Click **Apply**. The page refreshes and displays a list of all components that match the search parameters.
4. To create a new component, enter a name in the first blank field in the Name column. This field is required.
 5. Optionally, enter a short description of the component.
 6. Select a component type from the Type drop-down list. This is a required field.
 7. Select Unit or Revenue from the Unit column drop-down list.
 8. Check the Computed Flag check box if the value of the component is to be derived from a formula.
 9. Click **Update** to save your work. If necessary, click **Restore** to return to the previously stored information.
 10. If you want to delete a component, check the Remove check box and click **Update**.

Guidelines

Component types are either fixed or variable. Variable component types are either Quota Based or Non Quota Based, depending on whether there is a quota as part of the compensation plan.

If the Quota for a Component is to be derived from using a formula, then check the Compute Flag box.

4.14.1 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.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Agreement > Sales Role Detail > Edit hyperlink

Steps

1. Select a component from the list of values.
2. Enter the percentage against this selected component. Repeat steps 1 and 2 until all variables of the formula have been defined.
3. Click **Restore** to retrieve the last saved set of information.
4. Click **Save** to save new information.

Guidelines

The percentages entered against each component selected will be multiplied with the value of each component. The results of all multiplication will be added together.

4.15 Define Attainment Schedule

Attainment schedules are used with the generated contracts. They display the calculated earnings for different levels of quota attainment. For instance, if an attainment schedule is created with 0%, 50%, and 100% as its attributes, then the contract displays any fixed and variable pay earnings if 50% of the quota was achieved. The Attainment Schedule is used in the Compensation Contract where earnings for each level of achievement are displayed. To create an attainment schedule, perform the following procedure. See *Oracle Incentive Compensation User Guide*, Chapter 12, for more details.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Attainment

Steps

1. Click the Administration tab and the Incentive subtab.
2. Click **Attainment** in the side panel menu.
The Attainment Schedule Summary page appears.
3. Enter the name of the attainment schedule you want to create in the blank field in the Attain Schedule Name column.
4. Click **Update**.
5. Click the new name from the Attainment Schedule Summary.
The Define Attainment Schedule page opens.
6. Enter the desired percentages in the blank fields.
If you need more than two fields, click **Update** and two more blank fields will appear under the saved ones.
7. Repeat step 6 until your attainment schedule is complete.
8. Click **Update** to save.

Guidelines

To delete an attainment schedule, check the Remove check 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.

4.15.1 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 are built using the Incentive subtab of the Administration tab in Oracle Incentive Compensation.

Seasonality can only be applied to variable non computed plan elements, such as salary or a car allowance.

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 are built using the Incentive subtab of the Administration tab in Oracle Incentive Compensation. Seasonality can only be applied to variable non computed plan elements, such as salary or a car allowance.

To create a new seasonality schedule, perform the following procedure.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Seasonality > Click Create

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Select Seasonality on the side panel menu.
The Seasonality Schedules page appears.
3. Click **Create**.
The Create New Seasonality Schedule page appears.
4. Enter a name for the new seasonality schedule in the name field. This is a required field.
5. Enter a description. This is a required field.

6. Select a year from the drop-down list.
7. If necessary, click **Restore** to return to the previously saved information.
8. 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.
9. When the schedule is the way you want it, click **Update** to save your work.
10. 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 all percentage entries to 0.

4.16 Define Roles

A sales role describes a set of resources who share a common compensation structure. Examples of roles are PC Salesperson, Consultant, and PC Regional Sales Manager.

Use the following procedure to define the details of a sales role.

Prerequisites

Sales Roles must already be created in Oracle Resource Manager. Rate tables, components, and attainment schedules must be created first in Oracle Incentive Compensation.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Navigation

Incentive > Agreement > select sales role

Steps

1. Click the Incentive tab.

The Agreements page appears. It is the first page of the Agreement subtab.

2. Select a sales role name. Use the search parameter at the top of the page to search if needed. Enter all or part of the sales role name before the percent sign and click **Apply** to use the search parameter. Click the sales role to go to the Sales Role Detail page.
3. Optionally, copy the fields from an existing role by selecting a role from the drop-down list. Click **Apply**.
4. 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.
5. Check the Club Eligible check box if this role is entitled to Club participation on achieving Club rules.
6. Use the Rounding Factor field if you want to round the assigned quota. For example, input 1000 if assigned quota is to be rounded up to the nearest 1000.
7. In the Quota Minimum and Quota Maximum fields, enter the range of quota figures that this role should have.
8. Input the Plan Level to indicate the position of the role in the sales hierarchy. For example, a street level resource will be assigned to Level 1.
9. Select an Attainment Schedule from the Attain Schedule drop-down list that is applicable to the compensation plan for this role.
10. The currency code is displayed as a read-only field.
11. Select Fixed Pay Components and then enter numbers against each component to indicate the sequence that it is to appear in the Assign Quota and My Quota Estimate windows. Enter the fixed pay amount for each fixed component. (For example: if the fixed salary of a resource is 50,000, then enter 50,000 against the fixed salary component).
12. Select Variable Pay, Non Computed Components as in step 11:
 - a. Enter the name of the component. Click **Go** to open a pop-up list.
 - b. Enter the sequential order of display in the Sequence column.
 - c. In the % of Total Quota column, enter the percentage of the quota that you want this component to represent in the compensation plan. *This must be entered for the Distribute Quota function to work.*
 - d. Enter the amount of commission at 100% of attainment.

- e. Select a seasonality schedule. Click **Go** to open a pop-up list from which to make your selection. The default seasonality schedule is even.
- f. Select a calculation formula by clicking **Go** and selecting it from the pop-up list.

To appear in the list, the formula must be cumulative and the Planning check box must be checked.
- g. Select a rate table from the drop-down list.
- h. Select a rate calculation method:
 - Anchors - These must be defined separately. If Anchors is selected, the Define link appears in the Anchors column.
 - Manual - Uses the predefined rate table.
 - Single Rate - All transactions are compensated at the same rate.
- 13. Select Variable Pay Computed Components and enter the sequential order of display. The selections are the same as the Non Computed Components in step 9, except that seasonality is not used but formulas are.
- 14. Select Variable Pay Non Quota Components. Click **Go** to open a pop-up list. Then, perform the following:
 - a. Enter the sequential order of display.
 - b. Enter the calculation formula. Click **Go** to open a pop-up list from which to make your selection.
 - c. Select a rate table from the drop-down list.
- 15. The sections for variable components in steps 9, 10, and 11 also contain fields for selecting a Calculation Formula and Rate Table. Enter information into these fields to enable calculation for these variable components.
 - a. Components with quotas additionally include an anchor column and a Disable Anchors check box.
 - b. Click **Define** in the Anchors column to go to the Agreement Details page.
 - c. Use anchors to indicate the maximum that can be earned at each tier of the rate table you selected.
- 16. Enter the name of the compensation plan in the Map to Compensation Plan field if you want the element to appear in that compensation plan after the activation process has been run.

17. Enter a start date and end date for the compensation plan mapping.
18. Click **Update** to save, or **Restore** to return to the previously saved information.

Guidelines

Entering the Quota range enables the Quota Range Report to be run. The minimum quota on the Sales Role Details window will be picked up on the Minimum Quota field on the Quota Modeling window when the minimum function is invoked by the user.

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 Salespeople in the Salespeople Hierarchy for the selected parameters (example, Organization, Effective Date) of each Report.

The Attainment Schedule will be 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.

4.17 Define Agreement Details

Use this page to 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.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Navigation

Incentive > Agreement > Search > click sales role link

Steps

1. On the Sales Role Detail page, in the Variable Pay, Computed Components area, click **Define** in the Anchors column.

The Agreement Details page appears.

2. Select a calculation method, Line or Step, from the Anchor Rate Calculation Method drop-down list (See Guidelines).
3. In the Rate Range area, enter the Minimum Rate and Maximum Rate for each tier of the Rate Table (optional).
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 Guidelines).
5. In the drop-down list of 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 the percentage of quota is to be used, select Percent in the Anchor Type column and enter the percentage of quota for each attainment level. See Guidelines for more explanation.
6. Click **Update** to save new information.
7. If necessary, click **Restore** to retrieve the last saved set of information.

Guidelines

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 in the Administration part 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%

Attainment
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:

Attainment	Expected Commission
0-25%	To be calculated
25-50%	To be calculated
50-75%	To be calculated
75-100%	To be calculated
100-999%	To be calculated

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
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:

Attainment	Commission Rate
0-25%	0
25-50%	100,000

Attainment	Commission Rate
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 (1 - 25%)
 $100,000 - 0 / (25\% - 0\%) \text{ TQ}$
 $100,000 / 25\% * 20,000 = 20$
- 2nd Tier (25% - 50%)
 $(150,000 - 100,000) / (50\% - 25\%) \text{ TQ}$
 $50,000 / 25\% * \text{TQ} = 10$
- 3rd Tier (50% - 75%)
 $(180,000 - 150,000) / (75\% - 50\%) \text{ TQ}$
 $30,000 / 25\% * \text{TQ} = 6$
- 4th Tier (75% - 100%)
 $(200,000 - 180,000) / (100\% - 75\%) \text{ TQ}$
 $20,000 / 25\% * \text{TQ} = 4$
- 5th Tier (100% - 999%)
 $(200,000 - 200,000) / (999\% - 100\%) \text{ TQ} = 0$

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 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.

4.18 Define Jobs

Job titles are used by Human Resources to categorize employees. Oracle Incentive Compensation uses roles, and a job title can be assigned to a particular role by using the Job Titles page.

Perform the following procedure to assign roles in Oracle Incentive Compensation to Job Titles.

Prerequisites

Resources must be set up in Oracle Resource Manager.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Job Titles

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Job Titles** in the side panel menu.
The Job Titles page appears.
3. Use the search parameters at the top of the page to search for a job title by name or by job code. Click **Go** to display the search results.
4. Click the link in the Job Titles column to go to the Resource Details - Job Titles page.
This page displays any roles that are already assigned to the job title.
5. To add a role, enter it in the Role column. You can click **Go** to open a pop-up window listing roles from which to select.
6. Enter a start date and end date. Click the calendar icon to open a pop-up calendar. A start date is mandatory; the end date is optional.
7. Click **Update** to save your work. If you are editing a role assignment, you can click **Restore** to return to the previously saved version.

Guidelines

If using Oracle Human Resources Management System, the job title information here is read from HRMS via Oracle Resource Manager. If you are not using HRMS, please refer to Oracle Resource Manager for more information.

4.19 Associate Jobs with Roles

This procedure is done in Resource Manager. See Resource Manager information in Oracle Incentive Compensation Implementation material (before step 1).

4.20 Define Resource Groups (Compensation Groups)

Compensation Groups are defined in Resource Manager. Refer to appropriate sections of the Oracle *CRM Foundation Implementation Guide (Implementing Resource Manager)* or Oracle *CRM Foundation Concepts and Procedures (Understanding Resource Manager)*.

4.21 Define Resources

Resources are created in Resource Manager. Refer to appropriate sections of the *Oracle CRM Application Foundation Implementation Guide* (Implementing Resource Manager) or *Oracle CRM Foundation Concepts and Procedures* (Understanding Resource Manager).

4.21.1 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.

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

4.22 Assign Resources to Roles and Groups

Resources are assigned to roles and groups in Resource Manager. Refer to appropriate sections of the *Oracle CRM Foundation Implementation Guide* (Defining Dynamic Groups) or *Oracle CRM Foundation Concepts and Procedures* (Understanding Resource Manager).

Prerequisites

Refer to *Oracle CRM Application Foundation Implementation Guide* (See: Implementation Tasks for Resource Manager).

Responsibility

System Administrator

Navigation

Forms Instance > Tasks > Import Resources

Steps

Note: All items that have a reference of creating or assigning an item should be noted as a prerequisite prior to adding a Supplier to Oracle Payable. The following steps are in the Forms user interface.

1. In the Toolbar, click **Tasks > Import Resources**
2. In the **Resource Category** field, select **Supplier Contact** from the list of values.
3. Enter information into the **Name** and **Contact** fields or select from the list of values.
4. Click **Search**. This populates the **Search Results** field.
5. Click **Create Resource**.
6. Verify the start date, then click **OK**.
7. Click **Save Resource**, then click **Details**.
8. Create **Sales Role** and **Compensation Group**.
9. In the **Resource** form, assign a valid **Resource number**.
10. Click the **Roles** tab. Assign a role type from list of values as **Incentive Compensation**.
11. Assign a **Role** from the list of values. **Save**.
12. Click the **Group** tab and assign **Group** from list of values.
13. Click **Save**. **Resources** tab is displayed. Select desired sales credit type from list of values. **Save**.

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
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) ;
```

4.23 Assign Roles to Job Titles

Job titles that are to be used in Planning need to be assigned to a role for a given date range.

Prerequisites

Job titles must be defined in Oracle HR.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Job Titles

Steps

1. Click the Administration tab and click the Incentive subtab.
2. In the side panel menu, click **Job Titles**.
3. On the Job Titles page, search for a job title.
4. In the search results listing, click a Job Title link.

The Resource Details - Job Titles page appears. The page displays any roles that are already assigned to the Job Title and Job Code.

5. To associate a new role to the Job Title Code and Job Code, enter four or more characters, including wildcards (%), in the Role field and click **Go**.
6. Click the link for the sales role you want to use.
7. Enter a start date for the role. You can click the calendar icons to open a date picker.
8. Optionally, enter an end date. You can use the calendar icon as in step 7.
9. Click **Update** to save. Before saving, you can click **Restore** to return to the previously saved setting.

4.24 Assign Job Titles to Resources

This procedure is performed in Resource Manager. See Resource Manager information in Oracle Incentive Compensation Implementation material (before step 1).

4.25 Customize On Target Earnings and Anchors

On Target Earnings and Anchors are part of the definition of a role. They can also be customized for individual resources. On the Resource Details - On Target Earnings page, you can view fixed and variable compensation plan elements for a resource, based on their compensation plan.

Prerequisites

The sales role must already be created in Resource Manager. The sales role details must already be created in the Agreement subtab of the Incentive tab. Rate tables must be created and assigned to the component to which you want to apply anchor values.

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. Click the Resource tab.
The Resource Search appears on the Planning subtab.
2. Use the Resource Search page to search for a resource.
The Resource Search Results page appears.
3. Click the name of the resource you need.

The Resource Details - Main page appears.

4. Click the amount in the On Target Earnings column.

The Resource Details - On Target Earnings page appears.

5. Enter revised amounts in the fields for the Fixed and Variable Amount fields.
6. To customize anchors, click **Anchor** in the Details column in the Variable, Quota Based area.

The Resource Details - Customized Anchors page appears.

7. In the Rate Schedule Detail section, enter the commission rate range for each tier of the Rate Table.
8. 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 Guidelines for more explanation.
9. To view rate tables for variable non-quota elements, click the Rate link in the Details column of the Variable, Non-Quota area.
10. If you are editing previously created information, you can click **Restore** to retrieve the last saved set of information.
11. Click **Update** to save your work.

Guidelines

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

Anchor	Type	Pay
200	Amount	50,000
9999	Amount	50,000

4.26 Assign and Distribute Quotas to Resources

4.26.1 Email Alert Messages

Follow this procedure to customize alert messages that are emailed to resources. The messages are a method to prompt the email receiver to perform an action. For example, when sales managers click the distribute button, their directs will receive an email that prompts them to view and accept their compensation plan.

Prerequisites

None.

Responsibility

Incentive Planning Analyst

Contract Approver

Navigation

Oracle Workflow Builder

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. Click the save icon in the toolbar.

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.

4.26.2 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.

4.26.3 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. Please look at the Workflow User Guide for details on how to do this.

4.26.4 Regoaling

Regoaling enables managers to change the quota or variable pay of a resource's compensation plan at any time. These changes could be required because of:

- A change in business circumstances
- A resource is receiving too much commission
- A resource is receiving too little commission
- A resource receives a promotion to a new role with a new goal

Regoaling can only be used if a plan is already accepted and activated.

Regoaling uses new seasonality and workday calendar features to calculate the exact amount to be paid. Seasonality allows planners to assign different quotas to each month to accommodate business cycles, and the workday calendar lets planners count each workday of each month, accounting for holidays and weekends. Seasonality and workday calendar can only be used on variable non-computed components, such as Licenses and salary.

For example, a resource's compensation plan has effective dates of January 1 to December 31. The resource can receive a new compensation plan on the 24th of July and the exact amount of compensation can be calculated for the rest of the year, based on the quotas assigned to August through December and on the exact number of work days remaining in July.

Prerequisites

Workday calendar profile must be set up in Forms. The transaction calendar must be set up in General Ledger and selected from the drop down list in Administration > Incentive > Settings. Seasonality must be set up in Administration > Incentive > Seasonality.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Navigation

Incentive > Agreement

Steps

1. Click the Incentive Tab.
The Agreements page is displayed.
2. Use the search parameter to list roles.
3. Click a role.
The Sales Role Details page appears.
4. Select seasonality in the Variable Pay, Non Computed Components area.
5. Select a rate calculation method:
 - Anchors - These must be defined separately
 - Manual - Use the predefined rate table
 - Single Rate - all transactions are compensated at the same rate
6. Click **Submit** to enter any changes.
7. Click the Resource tab.
The Resource Search page on the Planning subtab appears automatically.
8. Use parameters to search for the resource.
9. Click the Resource name on the Resource Search Results page.
The Resource Details - Main page appears.
10. Check the Adjust Quota radio button.
11. Click **Update**.
The Resource Details - Quota Adjustment page appears.
12. Check the button next to an existing role to adjust it, or click the button next to the blank row to enter information for a new role.

If you are regoalting an existing role, enter start and end dates for the new quota. Be sure to set the end date an old quota the day before the start of a new one.

13. Click the link to Quota Allocation Details.

The Allocation Details - Quota and Pay Assignment page appears.

14. Click **Prorate**.

15. Adjust any prorated amount that you want to manually. This is good for rounding amounts to even numbers.

When you change the amounts manually, it changes the proration factor, which changes the On Target Earnings (OTE) as well.

16. After you have made any changes you want to make, click Update to save them.

17. Click **Lock**.

18. Click **Generate**.

The Generate button then becomes the Submit button.

19. Click **Submit** to submit the plan to the Contract Approver.

20. Click the Single Tier Rate link to go to the Allocation Details - Rate page.

21. Check the Standard Rate button if you want to calculate based on the computed figures. Click the Effective Rate button if you want to base calculations on previous achievements.

22. Click **Generate Effective Rate**.

After the plan is submitted to the Contract Approver, it needs to be approved by someone with the responsibility of Contract Approver or Incentive Compensation Super User. This is the procedure:

Prerequisites

Plan is submitted to contract approver.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Navigation

Quota > Approve

Steps

1. Click the Quota tab and click the Approve subtab.
The Resource Search page appears.
2. Enter search parameters and click **Go**.
The Resource Search Results page appears.
3. Click the resource name link to go to the Contract Approval Page.
4. Select Approve in the drop down list in the Action column next to contracts you want to approve. You can also click **Approve All** to approve all of the submitted contracts at once.
5. Click **Distribute**.

A manager can distribute a plan by using My Salespeople in Oracle Sales Online.

After the compensation plan has been distributed, the resource must log into Oracle Sales Online to accept the plan. See [Section 4.27, "Resources Accept Plans Using Oracle Sales Online"](#).

To Activate the sales role, perform the following procedure:

Prerequisites

The compensation plan must already be accepted by the resource.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Navigation

Incentive > Activation

Steps

1. Click the Incentive tab and click the Activation subtab.
The Role Activation page appears.
2. Check the Activate check box.
3. Click **Update**.
4. To activate all plans, click **Activate All**.

To activate the resource, perform the following procedure:

Prerequisites

Compensation plan must be accepted by the resource. The sales role must be activated.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Navigation

Quota > Activate

Steps

1. Click the Quota tab and click the Activate subtab.
2. Enter parameters in the Resource Search page to find the resource you need.
The Resource Search Results page appears.
3. Click the name in the Resource Name column.
The Compensation Plan Activate page appears.
4. Click the check box in the Activate column.
5. Click **Activate**.

4.27 Resources Accept Plans Using Oracle Sales Online

Resources can log on to Oracle Sales Online and accept their Compensation Plans. To do this, perform the following procedure:

Prerequisites

Compensation plan must be distributed. Resource must have access to Oracle Sales Online.

Responsibility

Sales Online User (with access to the Compensation tab)

Navigation

Oracle Sales Online > Compensation > Compensation Plan

Steps

1. Click the Compensation tab and click the Compensation Plan subtab.
The plan status is Issued.
2. Click the Rate link to go to the Contract page.
3. Review the contract and click Accept to accept the contract.
The plan status changes to Accepted.

4.28 Activate Pay Periods

To activate a pay period, perform the following procedure:

Prerequisites

Pay periods must be defined in Oracle Incentive Compensation.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Pay Periods

Steps

1. Click the Administration tab, and click the Incentive subtab.
2. Select Pay Periods in the side panel menu.
3. Select a calendar from the list of values. Click **Apply**.
4. Activate a pay period by selecting Active from the list of values (LOV) in the Period Status column.
5. If necessary, click **Restore** to return to the previously saved information.
6. Click **Update** to save your changes.

4.29 Define Pay Groups

A pay group defines the frequency of payments, such as monthly or semimonthly, for the resources who are assigned the pay group. Use this procedure to define pay groups.

Prerequisites

Calendars must be defined in GL and pay periods must be activated in Oracle Incentive Compensation.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Pay Group

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Select Pay Group from the side panel menu.
The Pay Group page appears.
3. Assign a unique name to the pay group. This field is required.
4. Optionally, enter a description.
5. Select an effective start date and end date for the pay group. Click the calendar icon to open a calendar. These fields are required.
6. Select a calendar. Click **Go** to open a pop-up box from which to make a selection.
7. Select a period type from the list of period types that were defined for the selected calendar. Click **Go** to open a pop-up box.
8. If necessary, click **Restore** to return to the previously stored information.
9. Click **Update** to save the pay group.

Guidelines

The period type defines the frequency of payments for the pay group. Even if a period type, such as quarter or year, is displayed in the pop-up box, it must be activated in Oracle Incentive Compensation before it can be used.

Note: In this release of Oracle Incentive Compensation, the period type must be set to Month for values to roll over to the next year in Year to Date reports.

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

The pay group reflects the frequency of the pay periods.

Each pay group requires a separate payrun.

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. Therefore, the application does not default any dates in the Resource Details > Assign Pay Groups table in the Resource tab.

When you assigned 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.

4.30 Set Up Collections

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

As a data collector, Oracle Incentive Compensation collects data from Oracle Receivables, Oracle Order Management, or other data sources and prepares that data to be transferred to the Oracle Incentive Compensation calculation processes.

4.30.1 Setting Up A New Transaction Source

Use this page to set up from which source you want to get the data for processing your transactions, and also to determine which Receivables events you want to generate the transactions. In the Transaction Source area, perform the following procedure:

Prerequisites

Tables must be set up already in the transaction source.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Collection** on the side panel menu.
The Collection - Transaction Sources page appears. It is the first of six Collections pages.
3. Enter the name of the transaction source in the first empty field in the Transaction Source column.
4. Enter a type, or an abbreviation for a legacy source. See Guidelines for restrictions.
5. Enter a Line Table name. Click **Go** to open a pop-up list from which to select a line table name. Click your selection to enter it into the field.
6. Select a Key Column for the table. Click **Go** to open a pop-up list.
7. To remove a transaction source, check the remove check box and the line will disappear after the next update.
8. Click **Update** to save your work. Before saving, you can click **Restore** to return to the previously saved information.

The Receivables Event area displays which receivables events are set up to collect transaction data. To set these events to collect data, perform the following:

1. Check the check box in the Collect Column next to the event for which you want to collect.
2. Click **Update**. Before saving, you can click **Restore** to return to the previously saved information.

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.

4.30.2 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 Receivables Posting and Order Booking selections, all the transaction source data is predefined and cannot be deleted or modified. A line table is mandatory.

There are two standard transaction sources: Receivables Posting and Order Booking. All of the fields for these two predefined transaction sources are fixed and cannot be deleted or modified.

To define source tables for nonstandard transaction sources, perform the following procedure:

Prerequisites

Tables must be registered in the Tables subtab.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Source Tables

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Collection** in the side panel menu.
3. Click the Source Tables link.

The Collection - Source Tables page appears.

4. Select a transaction source from the drop-down list.
5. Click **Apply**.
The Type and Status fields populate, and any tables that are already defined populate in the fields below.
6. If a field can be changed, enter a table name, or click **Go** to open a pop-up list. Click your selection to enter it into the field.

Guidelines

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.

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.

4.30.3 Queries

On this page the significance of the information entered in the Source Tables tab becomes apparent. The capability for querying depends on the information entered into the Source Tables. You can generate a list of transactions that are eligible for compensation using the Notification Query and Parameters.

The Queries page is divided into two areas: Notification Query and Collection Query. 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. The Parameter subsection of the Notification Query area allows you to narrow your focus, for example, by start date and end date.

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

The Queries link is active only if new transaction sources have been created. It does not appear for predefined transaction sources--Receivables Posting and Order Booking.

You can only use the queries subtab to define a Custom Source from which to collect to Oracle Incentive Compensation. For standard integration with Oracle Receivables and Oracle Order Management (through Order Capture) you cannot edit the query conditions which are part of the standard process.

To change or enter new parameters in the Notification Query area, perform the following procedure:

Prerequisites

The Queries page is only accessible for nonstandard collection sources.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Queries

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Collection** on the side panel menu.
3. Click the Queries link.

The Collection - Queries page appears.

4. Enter the name of the parameter in the field.
5. Click **Update**.

The Type field populates.

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.

6. While entering data, click the eraser icon to clear the field. If you want to return to the previously stored information, click **Restore**.

Guidelines

This Notification query joins together the mandatory Line table (L_ORDER_LINES) and the optional Header table (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 (*Setup -> Collection Parameters* menu option). 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.

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.

4.30.4 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 can 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.

4.30.5 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.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Mapping

Steps

1. Click the Administration tab and the Incentive subtab.
2. Click the Collection link in the side panel menu.
The Collection - Transaction Sources page appears.
3. Click the Mapping link.
The Collection - Mapping page appears.
4. Enter a source expression in the Source Expression field.
5. Enter a destination. Click **Go** to open a pop-up list. In the Select box, enter search parameters and click **Go**. Select from the list. See Guidelines.
6. If necessary, click **Restore** to return to the previously saved information.
7. Click **Update** to save your work.

4.30.6 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. 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.

The remainder of this section describes an 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. To set up the direct mapping, 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.

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.

4.30.6.1 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.

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 from the LOV.

4.30.6.2 Relationship Indirect Mapping

Alternatively, to set up a Relationship Indirect Mapping for Territory, perform the following steps:

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

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. Use the LOV on the Relationship field to 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 from the LOV.

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.

4.30.6.3 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.

4.30.7 Actions

The Actions page allows you to change the Collection processing for the transaction source in two ways--the addition of User Code Blocks and the specification of Transaction 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.

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

To create a User Code Block, perform the following procedure.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collections > Actions

Steps

1. Click the Administration tab and click the Incentive subtab.

2. Click **Collections** on the side panel menu.
3. Click the Actions link.
The Collections Setup - Actions page appears.
4. Select a location for the user code block from the Location drop-down list. Choices include:
 - Pre-Notification: at the beginning of the procedure
 - Post-Notification: between running the Notification and Collection queries
 - Post-Collection: after the Collection query has been run
5. Enter the code in the Code field.
6. If necessary, click **Restore** to return to the previously saved information.
7. Click **Update** to save your changes.

To create a filter, perform the following procedure:

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. If necessary, click **Restore** to return to the previously saved information.
4. Click **Update** to save your work.

Guidelines

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

- At the beginning of the procedure
- Between running the Notification and Collection queries
- After the Collection query has been run

Because you cannot access the Queries page for a standard transaction source, you cannot change the collection query to filter transactions that you do not want. This is why the filters on the Actions page are useful for these transaction sources.

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 than \$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 imported into Oracle Incentive Compensation.

4.30.8 Generate

When the collection setup is complete, you are nearly ready to generate your Collections package. However, since 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, test first whether this new package is valid. The Test Generate button on the Generate page enables you to test the validity of the new package.

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.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Generate

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Collection** on the side panel menu.
3. Click **Generate**.
The Collection - Generate page appears.
4. In the Summary area, click the button in the Select column next to the transaction source for which you want to run a test generation.
5. Click **Test Generate**.
A test version is generated.
6. If Error appears in the Test Status column, click it to open the details area below the Summary area.
The Error Text and entire Package text are displayed.
7. Fix the errors and rerun the test generation until you are satisfied with the result.
8. You can click **Yes** or **No** in the Collect Flag to return to the Transaction Sources page and verify it or change it.
9. 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.

4.30.9 Run Collections

After performing all of the setups on Administration > Incentive > Collect, you actually 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

Runtime Parameters

Runtime parameters are used to narrow the range of transactions collected in a collection package if you are using a custom transaction source. For example, 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.

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. If necessary, click **Restore** to return to the previously saved information.
4. Click **Update** to save your changes.

Submit a Request

To submit a transaction collection request, perform the following procedure.

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. Click the Transaction tab. The Collect subtab page opens automatically. Click the Submit Request link. The Collection Submission - Submit Request page appears.
2. In the Collection Type field, select a collection type from the drop-down list. The collection types include:

- Collect Clawbacks
- Collect Custom Transaction Source
- Collect Invoices
- Collect Orders
- Collect Payments and Givebacks
- Collect Revenue Adjustments
- Collect Writeoffs

3. Click **Apply**.

Note: 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 5.

4. Select Start Period and End Period dates from the drop-down lists.
5. Click **Submit Request**.
A confirmation window appears.
6. Click **OK** to submit the request. Click **Cancel** to return to the current page.

If you clicked **OK**, the requested data is displayed below the search parameter fields.

7. 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. If you need to recollect previously collected transactions, consult with Oracle Support.

Viewing the Request Status and Logs

Data must be collected from the mapped tables into Oracle Incentive Compensation before calculation for payment can occur. Use this procedure to view the status of the collection submission.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Navigation

Transaction > Collect > View Request Status

Steps

1. Click the Transaction tab. In the Collect subtab the Collection Submission - View Request page appears automatically.
2. Select the type of collection event you want from the Collection Type drop-down list. The list includes:
 - All

- Clawbacks
 - Custom Transaction Source
 - Invoices
 - Orders
 - Payments and Givebacks
 - Revenue Adjustments
 - Writeoffs
3. Select one of five options from the Phase drop-down list:
- All
 - Completed
 - Inactive
 - Pending
 - Running
4. Select one of 18 statuses in the Status drop-down list.
- All
 - @@Normal
 - @Normal
 - @Waiting
 - Cancelled
 - Disabled
 - Error
 - No Manager
 - Normal
 - On Hold
 - Paused
 - Resuming
 - Scheduled
 - Standby

- Suspended
 - Terminated
 - Terminating
 - Waiting
 - Warning
5. Optionally, enter a search string in the Request ID field.
 6. Click **Apply** to view a list of collection submissions.

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

It is recommended that you actually run the package to collect transactions. This is accomplished by the Collect Custom Transaction Source concurrent program. This program requires you to enter a single parameter, the name of your Transaction Source. The LOV on this parameter lists all custom Transaction Sources that are set up.

Remember that if you created any parameters on your Queries page, you do not set their values on the Concurrent Program run page. You have to use the Collection Parameters page to set their runtime values before you call up the Concurrent Program.

The final action required to pull these transactions from the API table into Oracle Incentive Compensation is to run the Transaction Interface Loader concurrent program, or to click the Load Transactions button on the Maintain Transactions page.

4.30.10 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. 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 are allowed to

change source values for these mappings and also to create new mappings of your own.

Prerequisites

Tables must exist in the transaction source and in the destination.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Navigation

Administration > Incentive > Collection > Mapping

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Collection** in the side panel menu.
3. Click **Mapping**.
The Collection - Mapping page appears.
4. Enter a source expression in the Source Expression field.
5. Enter a destination. Click **Go** to open a pop-up list. In the Select box, enter search parameters and click **Go**. Select from the list.
6. If you want to perform indirect mapping, click **Indirect** to open the Indirect Mapping Details area at the bottom of the page.
7. In the Indirect Mapping Details area, enter a join relationship or click **Go** to select one from a pop-up list.
8. If necessary, click **Restore** to return to the previously saved information.
9. Click **Update** to save your work.

Guidelines

When you first display the Mappings page for a standard transaction source, the Inherited column will display === 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.

4.30.11 Use Filters

See *Filters* in [Section 4.30.7, "Actions"](#).

4.30.12 Receivables Posting and Order Booking Special Features

4.30.12.1 Receivables Posting

The predefined Receivables data source differs slightly from any other data source because it really represents four 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 (a giveback is a past due invoice that had been taken back but has now been paid)
- Writeoff posting
- Takeback posting (once 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

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.

To select which packages to collect, perform the following procedure:

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Collection** in the side panel menu.
The Collection - Transaction Sources page appears.
3. In the Receivables Event area, check the check boxes in the Collect column for which you want to collect transactions.
4. Click **Update** to save your changes. Click **Restore** to return to the previously saved information.
5. Click **Generate** to open the Collection - Generate page.
6. 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

4.30.12.2 Order Booking

Compared with 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 called by a dedicated concurrent program. The concurrent program requires two parameters, a start period and an end period. The parameter entry is supported by a list of values.

Although this transaction source collects from Oracle Quoting - Forms (formerly known as Order Capture), the transactions actually originate in Oracle Order Management. Oracle Quoting - Forms acts as an interface. The transactions themselves are sales credits for orders that have reached the Booked status in Order Management.

4.30.13 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, 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*.

The list of updates to Orders is maintained for Oracle Incentive Compensation by the Oracle Quoting - Forms application. However, this only occurs if you inform Oracle Quoting - Forms of this requirement. You must register Oracle Incentive Compensation with Oracle Order Management.

Coping With Adjustments

You can cope with adjustments to transactions in your custom transaction sources in the same way as standard Collections from Oracle Quoting - Forms does. All you need to do is to call a Collections API, identifying the transaction that has been changed.

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 2000 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
);
```

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. If you do not understand this concept then please consult the appropriate documentation before trying to understand the following paragraph.

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`.

4.31 Set Up Expense/Liability Account Mapping

In this release of Oracle Incentive Compensation, 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 three levels: plan element, revenue class, and classification. There is an interface table in Oracle Incentive Compensation. After the data is mapped to the interface, the subledger is updated to reflect the amounts paid. The Liability Account will also be mapped to the Oracle Payable interface using the account generator in Oracle Incentive Compensation.

4.31.1 Account Generator

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

- REVENUE CLASS

- PLAN ELEMENT
- CLASSIFICATION

See Guidelines for more about the three levels. To set the level, perform the following procedure:

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > System Parameters

Steps

1. Click the Administration tab and click the Incentive subtab.
2. The system parameters page opens. It is the first selection on the side panel menu.
3. Scroll down to the Payment area.
4. Select the level of account generation from the Account Generation drop-down list.
5. Click **Update** to save your changes. If you are making changes to existing System Parameters, you can click **Restore** to return to the previously saved information.

If you select the Classification level from the Account Generation drop-down list, you must perform the following setup, which is similar to the current classification Ruleset procedure:

Steps

1. Click the Administration tab and click the Incentive tab.
2. In the side panel menu, click Ruleset.

The Rulesets page appears.

3. Define the name of the ruleset.
4. Enter a start date and an end date for the ruleset. Click the calendar icons to open pop-up calendars.
5. Select the type of Account Generation from the drop-down list.
6. Click **Update** to save your work.
7. Click Rules in the Rules column.

The Rules Hierarchy page appears.

8. In the lower part of the page, enter a name for the new rule.
9. Add Expense Code and Liability Code names. Click the flashlight icons to open a search box. Enter four or more characters in the search field and click **Go**, then select the code you need.
10. Click **Update** to save your changes.
11. Click the Attributes link for the new rule.

The Rule Attributes page appears.

12. Choose an attribute and a value using the flashlight icons to open search boxes.
13. Optionally, check the Not check box to specifically exclude the value of the attribute from classification.
14. Optionally, enter 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.

15. Save the rule.

The expression appears.

16. To add rules in the rules hierarchy, position your cursor over the parent rule, right click, and choose New Rule. Repeat from step 2.
17. 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 4.36, "Define Classification Rulesets for Revenue Classification"](#). 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 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.

4.32 Set Up Plan Element to Oracle Payroll Pay Element Mapping

Use this page to map the plan elements in Oracle Incentive Compensation to the pay elements in Payroll. To add or change a record, perform the following procedure.

Prerequisites

Plan elements and pay elements must already be created.

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. Click the Administration tab and click the Incentive subtab.
2. Click **Payroll** on the side panel menu.
The Payroll Mapping page appears.
3. Enter the changes to the Plan Element or Pay Element fields.
 - Enter four or more characters in the element fields and click **Go** to open a pop-up list.
 - Click the calendar icon in the date fields to open a pop-up calendar.
4. Check the Remove check box if you want to eliminate the plan element to pay element mapping.
5. Click the Inactive Employees check box if you want to keep the mapping but not use it now.
6. If necessary, click **Restore** before clicking **Update** to return to the previously stored information.
7. Click **Update** to save any changes you have made.
8. You can click **Element Input** to go to the Pay Element Input Values Mapping page.

To enter a new mapping, perform the following procedure.

1. Enter a plan element in the first blank plan element field. Click **Go** to open a pop-up list.
2. Enter the pay element from Payroll that you want to use.
3. Enter a start date and an end date.
4. If necessary, click **Restore** to return to the previously saved information.
5. Click **Update** to save your mapping.

Guidelines

The mapping information is stored in the CN_QUOTA_PAY_ELEMENT_MAP table. The three-column table below shows examples of how the mapping is set up between Oracle Incentive Compensation plan elements and 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

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

4.32.1 Pay Element Input Values Mapping

If a pay element in 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.

Responsibility

Incentive Compensation Super User
 Incentive Compensation Analyst
 Incentive Planning Analyst

Navigation

Administration > Incentive > Payroll

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Payroll** on the side panel menu.
The Payroll Mapping page appears.
3. Click the link in the Element Inputs column next to the plan element and pay element that you want to work on.
The Pay Element Input Value Mapping page appears.
4. Enter a table name in the first blank field in the Table Name column. Click **Go** to open a pop-up list.
5. Enter a column name in the Column Name column. Click **Go** if needed.
6. In a line that is not yet saved, you can click the eraser icon to clear the fields before entering new information.
7. To remove a saved line, check the check box in the Remove column.
8. If necessary, click **Restore** to return to previously saved information.
9. Click **Update** to save.

4.33 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.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Tables

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click **Tables** in the side panel menu.
The Tables page appears.
3. In the schema search parameter field, enter CN% to query for Incentive Compensation tables.
Note: Be sure to enter CN in uppercase letters.
4. Click **Update**.
The CN schemas are now listed.
5. Scroll down to CN_COMMISSION_HEADERS.
6. In the Details column, click **Columns**.
The Columns page appears.
7. In the View drop-down list, select which columns you want to view. Choices include Columns, Dimensions, Classification, and Primary Key.
8. Click **Apply**.
9. Use the search drop-down list to narrow find the column name you need.

For Columns or Dimensions, the following steps apply:

10. Enter the name of your choice in the User Name field. Make sure it is a name that is easy to understand and use.
11. The Data Type field indicates if the column contains alphanumeric material (VARCHAR2), numerical data (NUMBER), or a date (DATE).
12. Check the usage check box if you plan to use the column for calculation.
13. Check the Foreign Key check box if you plan to use the column as a foreign key to collect data from the table.
14. Click **Update** to save your changes. Before saving, you can click **Restore** to return to the previously stored information.

4.34 Define Revenue Classes

Revenue classes are user-defined categories of business revenue used to determine whether a sales credit is applied to a compensation payment. A hierarchy composed of broader revenue classes at the top, or root, with subclasses as children of the root, 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 salespeople, 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.

Use the following procedure to define your revenue classes and build revenue class hierarchies.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Revenue Class

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Select Revenue Class from the side panel menu.

The Revenue Class page appears. The Revenue Class page displays all previously defined revenue classes.

3. To define a new revenue class, enter the name in the first blank Name field.
4. Optionally, enter a description. The description often is the same as the name.
5. In the Liability Code and Expense Code columns, select a liability code and expense code if needed to integrate with Accounts Payable (optional).
To search for liability codes and expense codes, click **Go** to open a pop-up list.
6. Click **Update** to save your work.

A confirmation message displays across the top of the page when the save is successful.

4.35 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.

Warning: Do not delete the Base Node of the seeded Revenue Class hierarchy.

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

To create a hierarchy in a new hierarchy type, perform the following procedure.

Prerequisites

Revenue classes have been created.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Hierarchy

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Select Hierarchy in the side panel menu.
The Hierarchy Types page appears.
3. Enter a name in the first blank Name column.
4. Enter four or more characters in the Base Table field and click **Go**. This field is required.
5. Enter four or more characters in the Primary Key field and click **Go**. This field is required.
6. Enter four or more characters in the Hierarchy Values field and click **Go**. This field is required.
7. Click **Update** to save.
A Confirmation message appears on the screen.
8. Click **Details** to enter the name of the new hierarchy.

9. The Hierarchies page appears.
10. Enter the name of the new hierarchy in the Name field and click Update.
11. Click **Details**.

The Intervals page appears.
12. Enter the start and end dates for the hierarchy. Click the calendar icon to open a pop-up calendar.
13. Click **Update** to save your hierarchy. If necessary, click **Restore** before clicking **Update** to return to the previously saved information.

The page refreshes with a system generated root node displayed and a details link in the Details column.
14. Click **Details**.

The Hierarchies page appears. It displays the existing available root classes. The application provides a default root class called Hierarchy Base Node.
15. Enter 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.
16. To add a child, select the parent revenue class for which you want to add a child.
17. Click the Add Child button.
18. 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
19. Click **Go** to open a pop-up box with a listing of available options for new nodes. Click your choice.
20. Click **Update** to add the revenue class to the hierarchy.

The new revenue class appears in the hierarchy.
21. Repeat steps 10 to 14 to build your hierarchy.
22. If necessary, click **Restore** to return to the most recently saved information.

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

Guidelines

You can create as many hierarchies as you need. However, only one hierarchy can be effective at a time.

You can import any portion of another hierarchy to become a child of your selected node in the hierarchy you are building.

4.36 Define Classification Rulesets for Revenue Classification

A classification ruleset is used to classify sales transactions to determine the appropriate revenue class for the transaction. 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. Use this procedure below to define a set of attributes and values that uniquely identify each revenue classification.

There are two ruleset types: Revenue Classification and Account Generation.

- 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.

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.

Prerequisites

Revenue Classes have been created and the user-defined flexfields of the CN_COMMISSION_HEADERS table have been defined. These flexfields will become the attributes that will be evaluated when determining a revenue class.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Ruleset

Steps

1. Click the Administration tab and the Incentive subtab.
2. Click **Ruleset** in the side panel menu.
The Rulesets page appears.
3. In the first blank field in the Ruleset Name column, enter the name of the new ruleset.
4. Enter a start and an end date for the ruleset. Click the calendar icons to open pop-up calendars.
5. Select Revenue Classification from the Ruleset Type drop-down list.
6. Click **Update** to save your ruleset.

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.

4.36.1 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.

To query for a rule or to create a rule and add it to the rules hierarchy, perform the following procedure:

Prerequisites

Classification Ruleset has been created.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Ruleset > Click Rules link

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Click the Ruleset link in the side panel menu.
3. Click the Rules link in the Rules column.
The Rules Hierarchy page appears.
4. To query for a rule, enter it into the Rule Name search parameter and click **Go**.
The rule name, along with its hierarchy, is displayed in the List of Values.
5. To add a rule, in the lower section of the Rules Hierarchy page, select Root from the Add Rule column drop-down list.
6. Name the rule.
7. To assign the rule a revenue class name, enter at least four characters in the Revenue Class Name field and clicking **Go**. Click the revenue class from the list generated by the search. This step is optional.
8. Click **Update**. The rule is displayed in the upper table of the Rules Hierarchy page. A confirmation message appears at the top of the page.
9. To define attributes for the rule, click **Attributes** in the Rule Attributes column.
The Rule Attributes page appears. All of the columns defined in the CN_COMMISSION_HEADERS table that have been designated for classification will appear as attributes in the drop-down list. If more attributes are needed, then the administrator must modify the CN_COMMISSION_HEADERS table.
10. In each of the three areas, enter four or more characters in the Attribute field and click **Go** to open a pop-up window list from which to select an attribute.
 - For Single Value attributes, enter a single value in the Value field.
 - For Range Value attributes, enter a low value and a high value in the fields.
 - For Hierarchy values, enter a hierarchy and a value. For the Hierarchy and Value fields you can enter four or more characters and click Go to open a list of values.
11. Each area has a Not Flag column containing a check box. Check the check box to indicate that you want to exclude that value from the rule. See Guidelines.

12. 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. See steps 5 through 8 for details.

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.

13. When you are done, return to the Rulesets page and check the Synchronize check 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.

14. 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.

The Build Expression page appears. See Guidelines.

15. Click **Update** to save your work. Before saving, you can click **Restore** to return to the most recently saved information.

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 check 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 inverse of a value you defined by checking the Not check 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.

Always customize the classification rules using the setup forms available. Do not modify the generated PL/SQL code.

4.37 Define Interval Types

Quota and payment targets are defined for a specific period of time. Intervals are used 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. To view or define an interval type, perform the following procedure.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Interval Types

Steps

To view details of an already created interval, perform the following procedure:

1. Click the Administration tab and click the Incentive subtab.
2. Select Interval Types from the side panel menu.
The Interval Types page appears.
3. Click the name of the interval in the Name column.
The Interval Numbers page displays.
4. The Interval Number column shows the previously defined interval numbers, based on the calendar and period type shown above.
5. Select a year from the drop-down list to view interval numbers for other years.

To create a new interval type, perform the following procedure:

1. On the Interval Types page, click **Create**.
2. Enter a name and description for the new interval.
3. Click **Update** to save your work. If needed, click **Restore** to return to the previously saved information.
4. From the drop-down list, select the year for which you want to enter interval numbers.
The interval numbers all display as 1.
5. Enter interval numbers. See Guidelines for suggested formats.
6. Click **Update** to save.

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 period.

For example, for quarterly intervals:

JAN-01, FEB-01, MAR-01 are all numbered 2001001

APR-01, MAY-01, JUN-01 are all numbered 2001002, and so on.

For Monthly intervals:

JAN-01 is numbered 2001001

FEB-01 is numbered 2001002

MAR-01 is numbered 2001003, and so on.

4.38 Define Credit Types

Use this page to define all credit types to be used in Oracle Incentive Compensation. 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.

4.38.1 View, Change, or Remove a Credit Type

To view, change, or remove a credit type, perform the following procedure.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Credit Type

Steps

1. Click the Administration tab and click the Incentive subtab.
2. Select Credit Type from the side panel menu.
The Credit Types page appears.
3. Optionally, use the search parameters at the top of the page. Enter a name or description ahead of the percent sign and click **Apply**.
4. Change the values in the Precision and Extended Precision fields as needed.
Precision defines the number of decimal places in which the credit type can be expressed.
5. If desired, check the Remove check box next to a credit type to remove it from the listing when the next Update is performed.
6. If necessary, click **Restore** to return to the previously saved information.
7. Click **Update** to save your changes.

4.38.2 Add a New Credit Type

To add a new credit type, perform the following procedure.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Credit Type

Steps

1. Enter a name for your credit type into the Name column in the topmost empty row.
Click the eraser icon to erase any mistakes in the current row as you work.
2. Enter precision and extended precision information.
3. Check the functional currency check box if you want the new credit type to be used as the functional currency.
4. If necessary, click **Restore** to return to the previously saved information.
5. Click **Update** to save your work.

4.39 Define Plan Elements

The following steps explain how to create a plan element using the Plan Element Details page. You can access this page by clicking **Create** on the Plan Elements page.

Use the following procedure to create a plan element.

Prerequisites

If the plan element includes a formula, then the formula must exist (see [Section 4.10, "Define Formulas"](#)).

If the plan element includes a rate table, then the rate table must exist (see [Section 4.9, "Define Rate Tables"](#)).

If the plan element includes a revenue class, then the revenue class must exist (see [Section 4.34, "Define Revenue Classes"](#)).

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Element > Create

Steps

1. Click the Incentive tab and click the Element subtab.

The Plan Elements page appears.

2. Click Create.

The Plan Element Details page appears with blank fields.

3. Enter a Name and Description for the new plan element at the top of the page.

The Name field is required. The Description field can help you correctly identify plan element with similar names when you are building a compensation plan.

4. Select None, Bonus, or Quota from the Quota Group drop-down list.

This selection affects how the plan element is displayed in the Year to Date Summary report. See Guidelines.

5. Select a Payment Group from the drop-down list. The default is Standard. This field is required. See Guidelines.

6. Enter a start date for the plan element. This field is required.

7. Optionally, enter an end date.

Note: This setting affects how variables are distributed.

8. In the Parameters area, select an incentive type from the drop-down list. This field is required.

Selections include Commission and Bonus, which are calculated differently. See Guidelines.

9. Select an Interval Type from the drop-down list. This field is required.

Interval Type affects the length of time during which transactions are accumulated for meeting sales goals. See Guidelines.

10. Select a Credit Type from the drop-down list. This field is required.

The credit type is normally the preset functional currency, but it can be any type that you define in the application.

11. Select Formula or External from the Formula Type drop-down list. This field is required. Each formula type requires a different action:

- **Formula:** Enter four or more characters (including wildcards) in the Formula field and click Go. Select a formula from the pop-up box. See Guidelines.

- External: Enter a PL/SQL package name in the Package Name field. This enables the application to find the external formula. See the Note in Guidelines.
12. Optionally, identify an expense account.
 - a. Enter four or more characters in the Expense Account field and click **Go**.
 - b. From the Code Combination window, select the desired expense account.Expense accounts can be identified at the plan element level. Earnings for the plan element are assigned to the specified expense account. See Guidelines.
 13. Optionally, identify a liability account.
 - a. Enter four or more characters in the Liability Account field and click **Go**.
 - b. In the Code Combination window, select the desired liability account.Liability accounts can be identified at the plan element level. Earnings for the plan element are assigned to the specified liability account. See Guidelines.
 14. Check the Eligible for Payee Assignment check box if you want to assign the payment to someone other than the resource receiving the sales credit.

As an example, this check box may be used if the credit receiver leaves the company and a new resource takes over an account.
 15. In the Variables area, enter an optional Target, Goal, or Fixed Amount. The Sum Revenue Classes check box lets you choose to combine the amounts from all revenue classes assigned to the plan element to meet a target or goal.
 16. Click **Create** to save your work.

Guidelines

The Quota Group drop-down list contains 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 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 customizable; the default setting is Standard.

In step 8, the formulas are based on the commission incentive type of a compensation plan. Bonus incentives 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.

In step 9, the drop-down displays the commonly used intervals of 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.

In step 11, 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.

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:

1. Start with a system generated formula that resembles your desired formula as closely as possible.
2. In the PL/SQL code, rename the formula, changing the name in every place it appears.
3. Change the formula number to Null.
4. Add customization as required.

4.39.1 Assign Revenue Classes

Revenue classes are user-defined categories of business revenue used to determine whether sales credit is applied toward a compensation payment. Click Revenue Classes in the side panel menu and use the Revenue Classes page to assign already defined revenue classes to a plan element.

To assign revenue classes to a plan element, perform the following procedure:

Prerequisites

Revenue classes must already be defined. Plan element details have been defined in the Plan Element Details page.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Element > Revenue Classes

Steps

1. Click the Incentive tab and the Element subtab.
The Plan Elements summary page appears.
2. Click a plan element link in the Name column.
The Plan Element Details page appears.
3. Click the Revenue Classes link in the side panel menu.
The Revenue Classes page appears.
4. Select a revenue class by clicking **Go** next to the first empty field in the Revenue Class column under any previously assigned revenue classes.
A pop-up window appears listing all available revenue classes.
5. Click a revenue class to select it.
6. Assign a quota to the plan element for the selected revenue class and enter it in the Quota column.
7. Assign a fixed amount to the revenue class for this plan element.
8. Assign a goal in the Goal column for this plan element.
9. Click **Update** to save your work. Before saving, you can click **Restore** to return to the previously saved information.

10. On the Revenue Classes page, click **Details** in the Details column to go to a Plan Element Details page with sections for Accelerators and Transaction Factors. On that page you can specify transaction factors and other factors that affect commission payments. See [Section 4.39.2, "Accelerators and Transaction Factors"](#) for a detailed procedure.

4.39.2 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 live of a sale.

4.39.2.1 Accelerators

For each revenue class, at plan element level, you can define incentives known as accelerators. Oracle Incentive Compensation provides you with 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 without affecting the payment

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 compensation amount but no higher quota achievement.

For example, a payment factor of 200% has been put onto the revenue class of LIC-DB compensation plans for field salespeople 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 Txn Type is set to Individually as they apply to each individual revenue class. Payment factors have no meaning if the Apply Txn Type is set to Group by Interval.

4.39.2.2 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% in total. 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 percent.

These items include Clawbacks, Credit Memo, Deposit, Debit Memo, Giveback, Manual Transaction, Payment Plan, Payment Plan Recovery, Order Return, Upgrade, and 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.

To assign accelerators or transaction factors, perform the following procedure:

Prerequisites

Revenue classes must already be created.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Element > Plan Elements

Steps

1. Click the Incentive tab and click the Element subtab.
The Plan Elements main page appears.
2. Select a plan element by clicking the link in the Name column.
The Plan Element Details page appears.
3. Click the Revenue Classes link in the side panel menu.
The Revenue Classes page appears.
4. Click the Details link.
The Plan Element Details page appears.
5. In the Accelerators area, enter a start date and end date for each accelerator. Start Date is a required field.

Click the calendar icons to the right of each field to open a date selection pop-up window.

6. Enter numbers in the Payment% and Quota% fields to show the amount of acceleration you want to assign. The default is 100, which is the full amount. Entries can be above or below 100.
7. For already created accelerators, you can check the check box in the Remove column and when you click **Update**, the accelerator is deleted.
8. As you create an accelerator, you can click the eraser icon in the Remove column to clear the fields in that row before you click **Update** to save.
9. If necessary, click **Restore** to return to the previously saved information.
10. Click **Update** to save your work.
11. In the Transaction Factors area, enter numbers in the Factor% fields to stage the payment of commission.

If there are more transaction factors than can be seen at one time, use the drop-down list at the bottom of the area to scroll through them.
12. In the Other Factors area, assign any changes you want to make to the listed events. The default entry for each Factor% column is 100.

If there are more other factors than can be seen at one time, use the drop-down list at the bottom of the area to scroll through them.
13. Click **Update** to save your work. Before saving, you can click **Restore** to return to the previously stored information.

4.39.3 Assign Rate Tables

You can assign parent rate tables and also a child formula to a plan element. See Guidelines for an explanation of how child rate tables are created and used. To assign rate tables, perform the following procedure.

Prerequisites

Rate tables must already be created.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Element > Rate Tables

Steps

1. Click the Incentive tab and the Element subtab.
The Plan Elements summary page appears.
2. Click a plan element link in the Name column.
The Plan Element Details page appears.
3. Click the Rate Tables link in the side panel menu.
The Rate Tables page appears.
4. Enter a rate table name in the Name column. Click the flashlight icon to open a pop-up list, from which you can select a rate table.
5. Enter an effective start date and end date. The start date field is required.
6. You can view the commission rates on the Rate Table Detail - Commission Rates page by clicking **Details** in the Details column.
7. Enter a child formula from the drop-down list if desired. Use the same steps as you used for the Parent Rate Table section. See Guidelines.
8. Click **Apply** to select a child formula.
9. When you are finished, click **Update** to save your work. Before saving, you can click **Restore** to return to the previously saved information.

Guidelines

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.

4.40 Define Compensation Plans

A compensation plan is built from plan elements. After the plan is assigned an effective start date and an effective end date, it can be assigned to multiple sales roles.

The Plan subtab contains five links:

- **Summary:** This page lists all defined compensation plans. It contains a Create button to go to another page to create new compensation plans.
- **Detail:** When you click a link in the Name column of the Summary page, the Compensation Plan Details page appears.
- **Plan Elements:** Click this link to assign plan elements to the compensation plan or view plan elements that are already assigned.
- **Sales Roles:** Click this link to assign the plan to a sales role or to see the sales roles to which the plan is currently assigned.
- **Salespeople Assigned:** Click this link to view to whom the compensation plan is currently assigned.

4.40.1 Compensation Plan Details

The Compensation Plan Details page is where you can make changes to an established compensation plan or create a new plan. If you have arrived at this page by clicking the name of the plan on the Compensation Plan page, some fields will be filled in already. If you clicked **Create**, the fields are blank. To create a new compensation plan, perform the following procedure.

Prerequisites

Plan elements must already be created.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Plan > Create

Steps

1. Click the Incentive tab and the Plan subtab.
The Compensation Plan page appears.
2. Click **Create**.
The Compensation Plan Details page appears.
3. In the Name field, assign a unique name to the new compensation plan.
4. Enter an objective description for this plan based on the associated sales role. The description is used as part of a contract for the resource.
5. Assign a start date and end date to the plan. Click the calendar icon to open a pop-up calendar.
6. Check the Allow Revenue Class Overlap check box if the plan elements assigned to the plan have overlapping revenue classes.

Use this option when 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.
7. If you are updating an existing plan, you can click **Restore** to return to the previously saved information.
8. Click **Update** to save your work.
9. Click **Assign Plan Elements** to go to the Assign Plan Elements page.
10. On the Assign Plan Elements, assign the plan elements. (See [Section 4.40.2, "Assign Plan Elements"](#) for specific steps.)
11. Return to the Compensation Plan Details Page.
12. Click **Validate** to complete the process.

Guidelines

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.

4.40.2 Assign Plan Elements

In the Name field of the Compensation Plan Details - Assign Plan Elements page, perform the following procedure to assign the plan elements you want in the compensation plan.

Prerequisites

Plan elements must already be created.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Plan > Plan Elements

Steps

1. Click the Incentive tab and the Plan subtab.
The Compensation Plan page appears.
2. Click a plan element link in the Name column to select it.
Note: If you have just finished creating the plan, you can click the Plan Element link directly from the Plan Element Details page.
The Plan Element Details page appears.
3. Click the Plan Elements link in the side panel menu.
The Compensation Plan Details - Assign Plan Elements page appears.
4. Enter a name or part of a name in the Name field and Click **Go**. This opens a pop-up list of values. Click your selection.

5. Enter a sequence number in the sequence column. This tells the application the order in which to process the plan elements.
6. You can remove a plan element by checking the Remove check box and clicking **Update**.
7. If you are updating an existing compensation plan, you can click **Restore** to return to the previously saved information.
8. When you are finished, click **Update** to save the plan element assignment. The Description, Start Date and End Date fields will populate automatically.
9. Optionally, you can click **Details** next to any plan element to review the plan element details.
10. After the plan elements are assigned and saved, click the Detail link in the side panel menu to return to the Compensation Plan Details page.
11. Click **Validate** to ensure that you have entered the plan information correctly. If everything is correct, the status in the Status field changes from Incomplete to Complete. See Guidelines.
12. Click **Sales Roles** to go to the Sales Roles page. That is where you assign the compensation plan to a sales role.

Guidelines

When you validate a compensation plan, the following are verified:

- 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 plan element has at least one revenue class and uplift factors assigned, with start and end dates within the plan start and end dates.
- Each plan element has a rate table structure that makes sense for the plan element type.
- Each revenue class has at least one key transaction factor and at least one other transaction factor.

If each of the above conditions is met, then the Status field shows **Complete**. If the Status field displays **Incomplete**, the plan cannot be used to calculate compensation.

4.41 Define Roles

Roles are defined in Resource Manager. Refer to appropriate sections of the *Oracle CRM Foundation Implementation Guide* (Defining Role Types) or *Oracle CRM Foundation Concepts and Procedures* (Understanding Resource Manager).

4.42 Define Compensation Groups

See [Section 4.20](#).

4.43 Define Resources

See [Section 4.21](#).

4.44 Assign Resources to Roles and Groups

See [Section 4.22](#).

4.45 Assign Compensation Plans to Roles

After you have created a compensation plan, you can assign it to multiple sales roles. Perform the following procedures to assign sales roles to a compensation plan.

Prerequisites

The sales roles and a valid compensation plan must already be created.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Plan > Sales Roles

Steps

1. Click the Incentive tab and click the Plan Subtab. Or, alternatively, you can click the Resource tab and click the Role subtab.

The Compensation Plan page opens.

2. In the Name column, click the compensation plan that you want to assign. Click **Search** or use a saved search for quick access to a list of plans.

The Compensation Plan Details page appears.

3. Click **Sales Roles** to go to the Sales Roles page.

The sales roles already assigned to the compensation plan are listed.

4. Click **Go** next to the first blank name field to open pop-up list of sales roles.

5. Select a sales role and click it.

6. Enter a start date and an end date for the role. If desired, use the calendar icons to open pop-up calendars.

7. Enter additional sales roles in the blank rows provided.

8. As you work, you can click the eraser icon at the left to clear information in a specific row.

9. To delete a sales role, check the Remove check box. The sales role is deleted the next time Update is clicked.

10. If you are updating a compensation plan assignment, you can click **Restore** to return to the previously saved information.

11. Click **Update** to save your work. If the sales role has a description, it will be displayed.

Guidelines

A sales role cannot be assigned overlapping plans.

4.46 Define Payment Plans

Payment plans are optional and are used to set up advance or deferred payments. Use payment plans to set rules governing how, when, and how much is paid and at what frequency. Payment plans guarantee that a minimum and/or maximum amount will be paid to a resource. These are identified as advances/draws and caps. The payment plans can be recoverable, non-recoverable, and use the earnings in the accumulation period to calculate the draws.

You can set up the recovery schedule and draw amount independently of the earnings for the period, and you can waive a recovery amount due from a resource.

Note: For the Waive Recovery to work properly, the pay periods must be defined correctly.

To define a new payment plan, perform the following procedure.

Prerequisites

Credit types must be defined.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Payment Plan

Steps

1. Click the Administration Tab and click the Incentive subtab.
2. Select **Payment Plan** on the side panel menu.
The Payment Plan page opens.
3. In the Name column, assign a unique name to the payment plan.
4. Enter a start date and an end date in the appropriate columns. Click the calendar icons to use a pop-up calendar. The Start Date field is required.
5. Select a Payment Group from the drop-down list. This is a required field. The default setting is Standard. See Guidelines.
6. In the Credit Type column, select a credit type from the drop-down list. Functional Currency is the default, but you can select other, previously defined credit types. The Credit Type field is required.
7. In the Payment Interval column, select a pay interval from the drop-down list. Period is the default, but you can select any previously defined pay interval from the list.

8. Optionally, establish a minimum amount to be paid at the end of each pay interval. Check the check box in the Recoverable column if it is recoverable from later earnings.
9. Optionally, establish a maximum amount that can be paid for any pay interval. If you check the check box in the Pay Later column, any amounts over the maximum to be paid can be rolled over and paid in future periods.
10. Select a recovery interval from the drop-down list. The default setting is the same as the pay interval.

Based on the recovery interval, the 'true-up' of draws against commissions occurs at the end of the interval assigned. For example, if a quarter is defined as April-June and a non-pay against commissions payment plan is valid from February to May, the recovery occurs in June.

11. Check the Pay Against Commission check box if you want the payment plan to apply its rules using earnings that have been collected in the application when it calculates draw recovery at the end of the recovery interval.
12. If necessary, click **Restore** to return to the previously saved information
13. Click **Update** to save the payment plan.

The payment plan is assigned to a resource in the Resources subtab of the Resource tab.

Guidelines

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 customizable; the default setting is Standard.

You can set up payment group codes in the Forms application using the following procedure.

Prerequisites

None

Responsibility

Incentive Compensation Developer

Navigation

Forms instance > Lookups

Steps

1. Log in to Forms using the Incentive Compensation Developer responsibility.
2. Navigate to Lookups.
3. Query the Lookup Type PAYMENT_GROUP_CODE.
4. Create the lookups you need for your business requirements.
5. Save.
6. Bounce the HTML server.

For more details on Lookups, see [Appendix B, "Lookups"](#).

Pay against commissions uses the commissions earned when determining the minimum amount. For example, if the draw minimum is \$1000 and the representative earns \$600, the draw amount is \$400. But if the payment plan does not incorporate the Pay against Commissions functionality, the draw is \$1000. At the end of the payment plan period and depending on the recovery period, the total draw can be 'trued-up' against the commissions; the commissions accumulated over the life of the plan would be used to recover the total draw.

The application checks first for the minimum amount and pays it. Recoverable amounts are calculated after the minimum is met.

4.47 Assign Pay Groups to Resources

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.

To assign a pay group to a resource, perform the following procedure.

Prerequisites

The pay group must be defined in Administration > Incentive > Pay Group. A valid resource has been selected from the Employees page that is generated from an advanced search request.

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 > Pay Groups

Steps

1. In the Name field, enter the name of the pay group to be assigned. Click the flashlight icon to open a pop-up list. Click the pay group name to select it.
2. Enter a start date and an end date. Click the calendar icons to open a pop-up calendar.
3. If necessary, click **Restore** to return to the previously saved information.
4. Click **Update** to save the pay group assignment.

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 assigned 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.

4.48 Assign Payment Plans to Resources

Payment plans are used to set up advance or deferred payments and to define minimum and maximum payments. They are optional.

To assign a payment plan to a resource, perform the following procedure.

Prerequisites

The payment plan must be defined in Administration > Payment Plan.

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 > Payment Plans

Steps

1. On the Assign Payment Plans page, review the resource's payment plan information.
2. To assign a new payment plan, enter it in the Name column of the first blank row. You can click the flashlight icon to open a pop-up list. Select the plan from the list and click it.
3. Enter a start date in the next column. You can click the calendar icon to open a calendar. Enter the date and it will appear in the Start Date field. This field is required.
4. Optionally, enter an end date in the End Date column.
5. If you want to pay the resource either a minimum or maximum amount regardless of commissions earned, then enter the amount in the Minimum or Maximum column.
6. The Recoverable, Pay Later, Recoverable Interval, and Pay Against Commission fields display read-only information about the payment plan as it was created in the Administration tab.
7. If necessary, click **Restore** to return to the previously saved information.
8. Click **Update** to save your work.

4.49 Customize Quota and Rates for Resources

Sometimes, you want to make changes to the plan elements of a compensation plan for a specific resource. You can do this on the Resource Details page.

From this page you can access the Plan Element Details page. There, you can assign and distribute variables (Target, Goal, and Fixed Amount).

To view information about a resource's compensation plan and make some changes to customize it, perform the following procedure.

Prerequisites

None

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 > Compensation Plan

Steps

1. Click the Resource tab and click the Resources subtab.

The Resource Advanced Search page appears.

2. Enter search parameters into at least one field on the page.
3. Click **Search**.

The Employees page appears. It lists any resource that were found by the search. If you see the resource you need, click the link in the Preferred Name column and the Details page appears for the resource. If no listings appear, try different search parameters.

4. Click Compensation Plan in the side panel menu.

The Compensation Plans page appears.

5. Select the resource's role in the Role Name list of values.
6. Click **Apply**.
7. Click the compensation plan Name link to display the plan elements.

The Plan Elements area lists the name as well as basic information about the plan elements.

8. Check the check box in the Customized Flag column next to the plan element that you want to customize for the resource.

Note: If you leave the Customized check box unchecked for a plan element, then any changes you make to the quota or rates for that plan element are automatically inherited by the resource. If you check the check box, the contents of the customized plan element are not affected by any changes you make to the plan element at the role level.

9. Click the plan element name in the Name column.

The Plan Element Details page is displayed.

10. The Plan Element Details page displays five fields of read only information at the top relating to the resource.

- Name
- Description (of the plan element)
- Quota Group: Quota or Bonus
- Start Date
- End Date

Note: This information is read-only because it was previously entered on the Plan Element Details page (Incentive > Element).

11. The Parameters area lists five fields relating to the plan element details. These fields include:

- Incentive Type: Commission or Bonus
- Interval Type: Period, Quarter, Year, or custom
- Credit Type: Functional Currency (default) or custom
- Formula: The name of the formula if the formula type is Formula.
- Eligible for Payee Assignment check box.

12. If you want to add or revise variables for a resource, add them in the Variables area.
13. To distribute the variables equally to each period of the resource's compensation plan, click **Distribute** at the top or bottom of the page.
This takes you to the Resource Details - Distribute Variables page.
14. You can select an interval from the View drop-down list. Selections include Period, Quarter, and Year.
Note: Regardless of the view, variables are distributed equally to each period.
15. Click **Apply**. The display changes to show the intervals selected in step 1.
16. To distribute variables, click **Distribute Target**.
The amounts are equally distributed to each period, duplicating the amount set in the Variables area of the Plan Element Details page.
17. Click **Update** to save any changes you made on the Plan Element Details page.

4.50 Reports

Incentive Planning Reports

There are ten Incentive Planning reports. Click the link in the report name column on the Reports subtab on the Quota tab to go to a search page. For the first nine reports, you arrive at the Resource Search page. On the Resource Search page, enter search parameters and click **Apply**, and the report appears.

For the Role To Compensation Plan Mapping Report, clicking the link takes you to a specific search page with three fields. Enter search parameters, click **Apply**, and the report appears.

Note: The report link name on the Reports summary page may vary slightly from the actual name of the report.

These are the ten Incentive Planning reports:

- [Section 4.50.1, "Quota Modeling Summary"](#)
- [Section 4.50.2, "Average Quota Report"](#)
- [Section 4.50.3, "Quota Overassignment Report"](#)
- [Section 4.50.4, "Quota Range Report"](#)
- [Section 4.50.5, "Compensation Contract Status"](#)

- [Section 4.50.6, "Overlay Report"](#)
- [Section 4.50.7, "Vacancy Report"](#)
- [Section 4.50.8, "Transition Report"](#)
- [Section 4.50.9, "Plan Activation Status Report"](#)
- [Section 4.50.10, "Role to Compensation Plan Mapping Report"](#)

Compensation Reports

Oracle Incentive Compensation provides eight Compensation Reports in HTML format. The Summary of Compensation Reports page lists these reports. Click the links to access them.

For some of the reports, when you click the link, a Resource Search page appears. Use search parameters to get to a Resource Search Results page. A few reports display another search parameter page after you make a selection from the Resource Search Results page.

Three reports do not use the Resource Search page or Resource Search Results page. The Classification Rules Report link leads to the Classification Rules Search page. The Commission Summary Report and the Quota Performance Report open directly from their Summary of Compensation Reports page links.

The steps below apply to the reports that use the Resource Search page and Resource Search Results page.

The following reports are available in this release:

- [Section 4.50.11, "Year to Date Summary"](#)
- [Section 4.50.12, "Transaction Details"](#)
- [Section 4.50.13, "Compensation Group Hierarchy"](#)
- [Section 4.50.14, "Classification Rules Report"](#)
- [Section 4.50.15, "Commission Summary Report"](#)
- [Section 4.50.16, "Quota Performance"](#)
- [Section 4.50.17, "Commission Statement"](#)
- [Section 4.50.18, "Unprocessed Transactions"](#)

4.50.1 Quota Modeling Summary

The Quota Modeling Summary report gives a snapshot of:

- A compensation group’s total quota and its constituents
- A compensation group’s quota approval status by resource
- The overassignment effect accumulating through lower levels of the organization hierarchy

You can see in one report the quota allocations to every resource or resource, including the manager of a selected compensation group. The quota is broken down by individual components that make up the total quota. Additionally, the user can see the over assignment expressed in values as well as percentages between each level of the organization hierarchy. These are represented by subtotals at the bottom of the report for each level of resources; for example, the total quota for resources at the bottom of the hierarchy (street level), the total quota for the immediate manager (first line manager) and the total quota for the manager of the first line manager.

Responsibility

- Incentive Compensation Super User
- Incentive Planning Analyst
- Incentive Planning Contract Approver
- Incentive Planning Finance Manager
- Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Quota Model Summary

Parameters

Prompts	Choices	Mandatory
Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"

Prompts	Choices	Mandatory
Effective Date	Calendar pick list	No but the default is today's date

The search criteria produces a list of Compensation Groups. You must select one Compensation Group.

Data

The first table of information

Column Title	Description
Resource Name	Lists resources in the Compensation Group selected
Employee Number	Displays associated employee numbers
Role	Displays associated roles
Role Start Date	Displays the start date of each resource's assigned role
Role End Date	Displays the end date of each resource's assigned role
Component 1 Name	Displays the assigned quota against this user-defined Component
Component 2 Name	Displays the assigned quota against this user-defined Component
Component 3 Name	Displays the assigned quota against this user-defined Component
Total Quota	Displays the total assigned quota for all Components for each role
Assigned Quota	Displays the rounded figure of the total quota
Plan Status	Displays the approval status of the Compensation Plan
Overlay	Yes or No flag (see Concepts and Procedures for explanation of overlay)

The second and last table of information:

Row Title	Description
Total quota for second line manager	Displays column totals for all resources with Plan Level value of 2 (see Sales Role Details screen and Plan Level field)

Row Title	Description
Total quota for first line manager	Displays column totals for all resources with Plan Level value of 1
Total quota for street	Displays column totals for all resources at the bottom of the hierarchy for this Compensation Group and with Plan Level value of 0 or null
Over assign from second line manager to first line manager	Displays the second line manager's quota as a percentage of the first line manager's quota
Over assign from first line manager to street	Displays the first line manager's quota as a percentage of the street resources quota

4.50.2 Average Quota Report

The Average Quota report displays the average quota value by role for the selected compensation group. It is useful to know the average quota value for comparable roles in various compensation groups and organizations. In some companies, compensation groups are organized by sales territory. Therefore, it is possible with this report to compare the quota between comparable roles over various territories.

Additionally for reference, the planned sales figure to be delivered by the selected compensation group is shown by means of a summary table that displays the total quota, excluding overlay and a breakdown of total quota by role. (Refer to *Oracle Incentive Compensation Concepts and Procedures* for explanation on overlay.) Against each role, there is a headcount. In the next and subsequent tables for each role there is a list of resources and a simple average of the quota assigned by role.

Note: The percentage values shown are percentages of the actual quota and not rounded figures.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Average Quota Summary

Parameters

Prompts	Choices	Mandatory
Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria will produce a list of Compensation Groups and User is required to select one Compensation Group.

Data

First table of information:

Column Title	Description
Role	Lists the roles available in the Compensation Group selected
Number of People	Displays the total number of people of each assigned role
Component 1 Name	Displays the total assigned quota against this user-defined Component by role
Component 2 Name	Displays the total assigned quota against this user-defined Component by role
Component 3 Name	Displays the total assigned quota against this user-defined Component by role
Total Quota	Displays the total assigned quota for all Components for each role
Assigned Quota	Displays the rounded figure of the total quota by role

The last row displays the grand total.

Second and subsequent tables of information are listed by role or Compensation Plan:

Column Title	Description
Name	Lists the resources with the relevant role or Compensation Plan
Component 1 Name	Displays the assigned quota against this user-defined Component for each resource
Component 2 Name	Displays the assigned quota against this user-defined Component for each resource
Component 3 Name	Displays the assigned quota against this user-defined Component for each resource
Total Quota	Displays the total assigned quota for all Components for each resource
Assigned Quota	Displays the rounded figure of the total quota for each resource

The last row displays the total number of resources for the role and the simple mathematical average for each column.

4.50.3 Quota Overassignment Report

The Quota Overassignment report shows in one report the over assignment value and percentage effect on the immediate level of resources and the street level resources. In the case of managers that have only street level resources reporting to them, the overassignment figures are displayed under Direct Overassignment and not Street Overassignment, even if the resources are street level. The Street Overassignment column is populated only for a manager who has both managers and street level resources as direct reports.

This report displays only resources with manager roles.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Overassign Quota Summary

Parameters

Prompts	Choices	Mandatory
Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria will produce a list of Compensation Groups and User is required to select one Compensation Group.

Data

Column Title	Description
Name	Lists the manager of the compensation group selected
Role	Displays associated roles
Plan Start Date	Displays the start date of each resource's assigned plan
Plan End Date	Displays the end date of each resource's assigned plan
Final Quota	Displays the rounded figure of the total quota assigned
Direct Overassignment	Displays the compensation group manager's quota as a percentage of his/her directs' total quota
Street Overassignment	Displays the compensation group manager's quota as a percentage of street-level resources' total quota

4.50.4 Quota Range Report

The Quota Range Report enables you to scan the list for those resources who fall outside the range of minimum and maximum quota values predefined for each role. Contract Approvers can use this report as a means of rejecting compensation plans or contracts that have been submitted for their scrutiny.

For each selected compensation group, the maximum and minimum quota range is displayed for each role. In addition, there is a column that shows how each resource's assigned quota in the selected compensation group fared against the minimum quota set for the role.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Quota Range Summary

Parameters

Prompts	Choices	Mandatory
Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria produce a list of Compensation Groups and you must select one Compensation Group.

Data

Column Title	Description
Resource Number	Displays associated employee numbers
Resource Name	Lists resources in the compensation group selected
Sales Role	Displays associated roles
Assigned Quota	Displays the rounded figure of the total quota assigned
Quota Minimum	Displays the role's minimum quota as defined under the Sales Role Details screen

Column Title	Description
Quota Maximum	Displays the role's maximum quota as defined under the Sales Role Details screen
Percent of Minimum	Displays each resource's actual assigned quota as a percentage of each role's quota minimum

4.50.5 Compensation Contract Status

The Compensation Contract Status report shows the number of people at each state of the approval process for a selected manager in a compensation group. To create a report for a specific manager, enter information into one or more fields below.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Compensation Contract Status

Parameters

Prompts	Choices	Mandatory
Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria produce a list of Resources Found. Select a name in the resource Name column.

Data

In the Compensation Contract Status report, the columns represent lines of business, including a total. The rows represent stages in the contract process, including Pending Approval, Pending Distribution, Pending Acceptance, and Accepted. There is a total row for each line of business.

4.50.6 Overlay Report

The Overlay report lists all overlay resources, if any, who are members of the compensation group and groups below this group. (Refer to Concepts & Procedures for explanation on overlay.) This report is a concise display of overlay resources as distinct from previous reports where both overlay and nonoverlay resources are displayed together.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Overlay Summary

Parameters

Prompts	Choices	Mandatory
Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria produce a list of Compensation Groups. You must select one Compensation Group.

Data

Column Title	Description
Name	Lists resources in the compensation group selected
Job Title	Displays each resource's job title as read from Oracle Resource Manager
Role	Displays associated roles
Assigned Quota	Displays the rounded figure of the total quota assigned

4.50.7 Vacancy Report

The Vacancy report lists all positions, by sales role and compensation group, that have not been filled for a particular manager. It is a concise means of listing vacancies and additional headcount requirements on one report.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Vacancy Summary

Parameters

Prompts	Choices	Mandatory
Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria produce a list of Compensation Groups. You must select one Compensation Group.

Data

Column Title	Description
Name	Lists vacancies in the compensation group selected
Compensation Group	Lists the compensation group manager's name
Role	Displays associated roles
Plan Start Date	Displays the start date of each resource's assigned plan
Plan End Date	Displays the end date of each resource's assigned plan
Final Quota	Displays the rounded figure of the total quota assigned

4.50.8 Transition Report

The Transition report lists all resources who have not been allocated a role, in the selected compensation group and groups below. It is a means of identifying those resources who do not have a role for the next contract cycle.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Transitional Salespeople

Parameters

Prompts	Choices	Mandatory
Name	Search field	No but the default is "All" or %

Prompts	Choices	Mandatory
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria produce a list of Compensation Groups. You must select one Compensation Group.

Data

Column Title	Description
Name	Lists resources in the compensation group selected
Resource Number	Displays employee numbers of the resources in the selected compensation group
Manager Name	Lists the compensation group manager's name
Manager Employee Number	Displays the compensation group manager's employee number

4.50.9 Plan Activation Status Report

The Plan Activation Status report lists the compensation plan activation status for all resources in the selected compensation group. The activation process is related to passing approved compensation plans from Incentive Planning to commission processing. This report helps you to identify those compensation plans that have not been activated for commission processing and to take action to investigate its non-active status.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Plan Status

Parameters

Prompts	Choices	Mandatory
Name	Search field	No but the default is "All" or %
Employee Number	Search field	No but the default is "All" or %
Compensation Group	Search field	No but the default is "All" or %
Organization	List of Values	No but the default is "Any"
Effective Date	Calendar pick list	No but the default is today's date

The search criteria produce a list of Compensation Groups. You must select one Compensation Group.

Data

Column Title	Description
Resource Number	Displays employee numbers of the resources in the selected compensation group
Name	Lists resources in the compensation group selected
Compensation Group	Lists the compensation group's name
Compensation Plan	Displays compensation plan
Role	Displays associated roles
Plan Status	Displays the approval status of the Compensation Plan
Reason	Displays the reason for any incomplete status

4.50.10 Role to Compensation Plan Mapping Report

The Role to Compensation Plan Mapping report lists all sales roles and how each was mapped to job title(s) as read from Oracle Resource Manager, for each compensation group selected.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Role to Compensation Plan Mapping

Parameters

Prompts	Choices	Mandatory
Effective Date	Calendar pick list	No but the default is today's date
Role Name	Search field	No
Plan Name	Search field	No

Data

The first table of information:

Column Title	Description
Role	Displays all roles that satisfy the effective date search criteria
Compensation Plan	Displays the name of each compensation plan
Start Date	Displays the beginning date of the compensation plan
End Date	Displays the lapsed date of the compensation plan

4.50.11 Year to Date Summary

The Year to Date Summary is an overview of a resource's achievements, commission and bonus earnings and advances or draws. This report is accessible by default by the Manager, Salesperson, Incentive Compensation Payment, and Incentive Compensation Super User responsibilities.

The figures are grouped by period and by plan element. A Super User can control which plan element appears as a quota or bonus category by checking the Quota Group check box on the Plan Element page. If you check:

- Quota: The plan element name displays in the Quota category.
- Bonus: The plan element displays in the Bonus category.
- None: The plan element name does not display.

The pay out section is grouped by earnings type and by period.

You can click the Download button to save the report in a .csv file that can be opened in a spreadsheet program. Note: If all of the digits do not display properly in the downloaded report, right-click in the cell and format the cell as General.

Note: Any transactions from December must be posted in order to appear in the January summary for the following year.

Note: To reset the salesrep subledger balances (cn_srp_periods) to zero at the beginning of each fiscal year during calculation, set the Reset Balances Each Year profile option to Yes. If it is set to No, the default setting, the balances carry over across fiscal years. You should decide which option you want to use for carrying forward balances and set it before using the application. If the profile is changed after the application has been used and calculations are run, you must rerun calculation to synchronize and accumulate the balances.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Navigation

Transaction > Report > Year to Date Summary

Parameters

Prompts	Choices	Mandatory
Resource Name/Number	Search fields on Resource Search screen.	Yes

Prompts	Choices	Mandatory
Credit Type	List of Values	No
Reporting Currency	List of Values	No, but defaults to functional currency.
Fiscal Year	List of Values	No
Graph	List of Values	No

Data

Column Title	Description
Quota Category	Displays each quota assigned to the resource
Period	Periods of the year displayed, for example, Jan-01 through Dec-01, with earnings shown below them.
Other	Begin Balance, Quota Earnings, and Payment rows shown at the bottom for each column. Also, Recoverable Draw Paid, Nonrecoverable Draw Paid, Draw Recovered. At the bottom is End Balance.

4.50.12 Transaction Details

The Transaction Details report shows transactional details of the specified resource and is used primarily by the Analyst. The report can be run to show results of any specified period and by transaction status.

This report is configurable and for instructions on how to hide or show selected columns, go to the section below.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Navigation

Transaction > Report > Transaction Details Report

Parameters

Prompts	Choices	Mandatory
Resource Name	List of Values	Yes
Order Number	Text Field	No
Adjustment Status	List of Values	No
Invoice Number	Text Field	No
Processed Date From	List of Values	Yes
Processed Date To	List of Values	Yes
Transaction Type	List of Values	No
Adjustment Date	List of Values	No
Calculation Status	List of Values	No
Reporting Currency	List of Values	No

Data

This standard report lists the transactions a resource is eligible to receive commission for during a specified period. The columns visible are controlled by the System Administrator. You can display up to 12 columns without having to scroll left or right. You can customize the report by adding columns, such as Attribute1 shown in the table. Below is a sample of the available columns for this report.

Column Title	Description
Invoice Number	Invoice Number
Invoice Date	Invoice Date
Order Date	Order Date
Order Number	Order Number
Creation Date	Creation Date (such as 03-JAN-2002)
Process Date	Process Date
Transaction Type	Transaction Type
Adjustment Status	Adjustment Status (Frozen, Reversal, etc.)

Column Title	Description
Adjusted By	Adjusted By
Calculation Status	Calculation Status (Rolled Up, etc.)
Original Currency Code	Original Currency Code (USD, etc.)
Sales Credit	Sales Credit
Commission	Commission Amount
Attribute1	Customizable attribute (part number, etc.)

4.50.13 Compensation Group Hierarchy

The Compensation Group Hierarchy report is useful not only for displaying compensation groups and the resources in each, but also for showing the roll up hierarchy of the groups in relation to each other. In the first column, the number indicates the level in the hierarchy of the compensation group. The Level 1 group is at the top of the hierarchy, and is also at the top of the report. Where there is a hyperlink, click the resource name to display a Year to Date Summary for that person.

Responsibility

Incentive Compensation Super User
 Incentive Compensation Analyst
 Incentive Compensation Payment
 Incentive Compensation Reports

Navigation

Transaction > Report > Compensation Group Hierarchy Report

Parameters

Prompts	Choices	Mandatory
Resource Name	Search field	Yes
Compensation Group	List of Values	No
Effective Date	List of Values	No, but today is the default

Data

Column Title	Description
Level	Read only numeral
Comp Group/Salesrep Name	Two fields (Expandable hierarchy)
Role	Role name (read only)
Start Date	Start date (read only)
End Date	End date (read only)

4.50.14 Classification Rules Report

The Classification Rules report displays the Rule Name, Revenue Class, and Expression for classification rules selected from the list on the Rules Found page.

Click **Download** to generate a .csv file that can be opened in a spreadsheet.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Navigation

Transaction > Report > Classification Rules Report

Parameters

Prompts	Choices	Mandatory
Ruleset Name	Search field	Yes, but set in System Parameters
Rule Name	Search field	No, but useful for narrowing search
Effective Date	Calendar icon	No, but today is default

Data

Column Title	Description
Rule Name	Rule Name
Revenue Classes	Revenue Classes
Expression	Expression

4.50.15 Commission Summary Report

The Commission Summary report is a snapshot of resources’ 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.

This report is identical to the Quota Performance report except that there are 3 extra columns (on the far right) available through this report. This report is accessible through Incentive Compensation Payment responsibility by default. For users with Manager and Salesperson responsibilities, the Quota Performance report is the default report.

You can change four fields before displaying the report by selecting from drop-down lists.

Responsibility

- Incentive Compensation Super User
- Incentive Compensation Analyst
- Incentive Compensation Payment
- Incentive Compensation Reports

Navigation

Transaction > Report > Commission Summary

Guidelines

If you want to run this report using a currency other than Functional Currency, be sure to configure the following system profile appropriately: OSC: Default Conversion Type. See Appendix C, Profile Options, for more specific information.

Steps

1. Select an Analyst from the drop-down list. The default is All.
2. Select a period from the drop-down list.
3. Select Functional Currency in the Credit Type field.
4. Select a Reporting Currency for the report from the drop-down list.
5. Click **Apply**.
The report appears.
6. Click the Personalize button at the end of the report to customize the report.
The Quota Performance Personalization page appears. Check check boxes to select Display Quota Groups (Bonus or Quota) and Display Periods (Annual, Year to Date, Period to Date).
7. Click the Download button at the end of the report to download the report as a file.

Parameters

Prompts	Choices	Mandatory
Analyst	List of Values	Yes
Period	List of Values	Yes
Credit Type	List of Values	Yes
Reporting Currency	List of Values	No

Data

Column Title	Description
Name	Resource Name
Resource Number	Resource Number
Cost Center	Resource Cost Center
Charge to Cost Center	Cost Center where commission will be charged
Analyst	Analyst Name
Sales Role	Resource Sales Role

Column Title	Description
Compensation Plan	Compensation Plan
Start Date	Start Date
End Date	End Date
Bonus Annual Quota	Bonus Annual Quota
Bonus Percent	Bonus Percent
Quota Annual Quota	Quota Annual Quota
Quota Percent	Quota Percent
YTD Bonus Target	Year to date bonus target
YTD Bonus Credit	Year to date bonus credit
YTD Bonus Earnings	Year to date bonus earned
YTD Quota Target	Year to date quota
YTD Quota Credit	Year to date sales credit
YTD Quota Earnings	Year to date quota-based earnings
YTD Total Earnings	Year to date total earnings (quota-based earnings plus bonus earned)
PTD Bonus Target	Period to date bonus
PTD Bonus Credit	Period to date bonus credit
PTD Bonus Earnings	Period to date bonus earnings
PTD Quota Target	Period to date quota
PTD Quota Credit	Period to date sales credit
PTD Quota Earnings	Period to date quota-based earnings
PTD Total Earnings	Period to date total earnings (quota-based earnings plus bonus)
Begin Balance	Beginning Balance of what is due to the resource
Draw	Amount of Draw paid
Net Due	Amount due after deductions

4.50.16 Quota Performance

The Quota Performance report is a snapshot of resources' achievement and earnings. Achievements are shown against interval to date quota and annual quota. Earnings totals are broken down by period to date and interval to date.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Navigation

Transaction > Report > Quota Performance

Parameters

Prompts	Choices	Mandatory
Analyst	List of Values	Yes (only for super user)
Period	List of Values	Yes
Credit Type	List of Values	Yes
Reporting Currency	List of Values	No

Data

Column Title	Description
Name	Resource Name
Resource Number	Resource's Employee Number
Cost Center	Resource Cost Center
Charge to Cost Center	Cost Center where commission will be charged
Analyst	Analyst Name
Sales Role	Resource Sales Role
Compensation Plan	Compensation plan name

Column Title	Description
Start Date	Start date
End Date	End date
YTD Draw Target	Year to date draw
YTD Draw Credit	Year to date Draw sales credit
YTD Draw Earnings	Year to date draw earnings
YTD Formula Target	Year to date formula
YTD Formula Credit	Year to date formula credit
YTD Formula Earnings	Year to date formula earnings
YTD Quota Target	Year to date quota
YTD Quota Credit	Year to date sales credit
YTD Quota Earnings	Year to date quota-based earnings
YTD Total Earnings	Year to date total earnings (quota-based earnings plus bonus earned)
PTD Draw Target	Period to date draw
PTD Draw Credit	Period to date Draw sales credit
PTD Draw Earnings	Period to date draw earnings
PTD Formula Target	Period to date formula
PTD Formula Credit	Period to date formula credit
PTD Formula Earnings	Period to date formula earnings
PTD Quota Target	Period to date quota
PTD Quota Credit	Period to date sales credit
PTD Quota Earnings	Period to date quota-based earnings
PTD Total Earnings	Period to date total earnings (quota-based earnings plus bonus)

4.50.17 Commission Statement

The Commission Statement report shows transaction details broken down by period for a resource. It is configurable. For instructions on how to hide or show selected columns, see [Section 4.50.21, "Configuring Reports"](#).

You can change four fields before displaying the report by selecting from drop-down lists.

Prerequisites

The resource must have commission lines for the period for which you are running the commission statement.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Navigation

Transaction > Report > Commission Statement

Also, you can drill down to this report from the Year to Date Summary.

Steps

1. In the Period Type field select Period, Quarter, or Year from the drop-down list.
2. In the Period field select a period.
3. In the Plan Element field, make a selection. The default setting is All.
4. In the Reporting Currency field, you can select from a list of currencies in which to display the report.
5. Click **Apply** to display the report.

Guidelines

After the report is displayed, you can drill down on a amount in the Invoice Number column to display the Invoice Detail page. This page displays the following information:

- Number
- Payment Type
- Receipt Date
- Maturity Date

- Customer Name
- From Bank
- From Account

Payment information includes the following:

- Currency
- Payment Amount
- Amount Applied
- On Account
- Unapplied Account

The Line Details area displays eleven columns of information related to the transaction.

Click the amount in the Order Number column to display the Order Detail page. This page shows the following general information:

- Number
- Date
- Type
- Resource

The Order Detail page displays the following shipping information:

- Ship to Person
- Ship to Address
- Ship Method

The area below the shipping information displays billing information:

- Bill to Person
- Bill to Address
- Taxable
- Currency
- Freight Terms
- Total

The Line Details area at the bottom of the screen displays nine fields of information related to the order itself, including the product, quantity ordered, and extended price.

Parameters

Prompts	Choices	Mandatory
Resource Name	List of Values	Yes
Period	List of Values	Yes
Period Type	List of Values	Yes
Plan Element	List of Values	No
Reporting Currency	List of Values	No

Data

This standard report lists the transactions a resource is eligible to receive commission for during a specified period. The columns visible are controlled by the System Administrator. You can display up to 12 columns without having to scroll left or right. Below is a sample of the available columns for this report.

Column Title	Description
Invoice Number	Invoice Number
Invoice Date	Invoice Date
Order Date	Order Date
Order Number	Order Number
Creation Date	Creation date
Plan Element	Plan element
Transaction Type	Transaction type
Sales Credit	Sales credit
Commission Amount	Commission Amount
Credit Receiver	Credit Receiver
Attribute1 (-100)	Custom attributes

4.50.18 Unprocessed Transactions

The Unprocessed Transactions report shows all transactions that:

- Have not been loaded, or
- Are in the status of Failed Classification, Classified, Rolled Up or Failed Rollup.

You can run this report for any calculation status, load status and adjustment status for any specified resource, date, transaction type, order and invoice number.

This report is configurable. For instructions on how to hide or show selected columns, see [Section 4.50.21, "Configuring Reports"](#).

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Navigation

Transaction > Report > Unprocessed Transactions

Parameters

Prompts	Choices	Mandatory
Resource Name	List of Values	Yes
Order Number	List of Values	No
Adjustment Status	List of Values	No
Load Status	List of Values	No
Invoice Number	List of Values	No
Processed Date From	List of Values	No
Processed Date To	List of Values	No
Transaction Type	List of Values	No
Adjustment Date	List of Values	No
Calculation Status	List of Values	No

Prompts	Choices	Mandatory
Reporting Currency	List of Values	No

Data

This standard report lists the transactions a resource is eligible to receive commission for during a specified period. The columns visible are controlled by the System Administrator. You can display up to 12 columns without having to scroll left or right. Below is a sample of the available columns for this report.

Column Title	Description
Invoice Number	Invoice Number
Invoice Date	Invoice Date
Order Date	Order Date
Order Number	Order Number
Creation Date	Creation date
Process Date	Process date
Transaction Type	Transaction type
Adjustment Status	Adjustment status
Adjustment Date	Adjustment date
Adjusted By	Adjusted by
Load Status	Load status
Calculation Status	Calculation status
Sales Credit	Sales credit
Attribute 1 (-100)	Custom attribute

4.50.19 Report Access by Responsibility

The headings list eight Incentive Compensation report users. An x indicates that the report is accessible with the corresponding default responsibility. The Incentive Compensation Developer responsibility does not have access to reports.

In the table below, Yes means the responsibility has access to the report; No means the responsibility does not have access.

Reports

	Incentive Planning Analyst	Incentive Planning Contract Approver	Incentive Planning Finance Manager	Incentive Planning Sales Manager	Incentive Comp. Super User	Incentive Comp. Payment	Incentive Comp. Analyst	Incentive Comp. Reports
Incentive Planning Reports (Quota tab)	-	-	-	-	-	-	-	-
Quota Model Summary	Yes	Yes	Yes	Yes	Yes	No	No	No
Average Quota Summary	Yes	Yes	Yes	Yes	Yes	No	No	No
Quota Overassignment Report	Yes	Yes	Yes	Yes	Yes	No	No	No
Quota Range Report	Yes	Yes	Yes	Yes	Yes	No	No	No
Compensation Contract Status	Yes	Yes	Yes	Yes	Yes	No	No	No
Overlay Report	Yes	Yes	Yes	Yes	Yes	No	No	No
Vacancy Summary	Yes	Yes	Yes	Yes	Yes	No	No	No
Transition Report	Yes	Yes	Yes	Yes	Yes	No	No	No
Plan Activation Status Report	Yes	Yes	Yes	Yes	Yes	No	No	No
Role To Compensation Plan Mapping Report	Yes	Yes	Yes	Yes	Yes	No	No	No
Compensation Reports (Transaction tab)	-	-	-	-	-	-	-	-
Year to Date Summary	No	No	No	No	Yes	Yes	Yes	Yes

	Incentive Planning Analyst	Incentive Planning Contract Approver	Incentive Planning Finance Manager	Incentive Planning Sales Manager	Incentive Comp. Super User	Incentive Comp. Payment	Incentive Comp. Analyst	Incentive Comp. Reports
Transaction Details	No	No	No	No	Yes	Yes	Yes	Yes
Compensation Group Hierarchy	No	No	No	No	Yes	Yes	Yes	Yes
Classification Rules	No	No	No	No	Yes	Yes	Yes	Yes
Commission Summary	No	No	No	No	Yes	Yes	Yes	Yes
Quota Performance	No	No	No	No	Yes	Yes	Yes	Yes
Commission Statement	No	No	No	No	Yes	Yes	Yes	Yes
Unprocessed Transactions	No	No	No	No	Yes	Yes	Yes	Yes

4.50.20 Road Map of Reports from Version to Version

In the table below, Yes means the report was available for the release; No means the report was not available.

Release	3i	11.5.3	11.5.4	11.5.5	11.5.6	11.5.7	11.5.9*	Notes
Yes means Report is available	-	-	-	-	-	-	-	*11.5.8 reports are the same as 11.5.9.
Planning Reports (Quota tab)	-	-	-	-	-	-	-	-
Quota Model Summary	No	Yes	Yes	Yes	Yes	Yes	Yes	Changed from Quota Modeling Summary in 11.5.6
Average Quota Summary	No	Yes	Yes	Yes	Yes	Yes	Yes	Started in 11.5.3.

Reports

Release	3i	11.5.3	11.5.4	11.5.5	11.5.6	11.5.7	11.5.9*	Notes
Quota Overassignment Report	No	Yes	Yes	Yes	Yes	Yes	Yes	Changed from Overassign Quota Summary in 11.5.6
Quota Range Report	No	Yes	Yes	Yes	Yes	Yes	Yes	Changed from Quota Range Summary in 11.5.6
Compensation Contract Status	No	No	No	Yes	Yes	Yes	Yes	Started in 11.5.5.
Overlay Report	No	Yes	Yes	Yes	Yes	Yes	Yes	Changed from Overlay Summary in 11.5.6
Vacancy Summary	No	Yes	Yes	Yes	Yes	Yes	Yes	Changed from To-Be-Hired Summary in 11.5.6
Transition Report	No	Yes	Yes	Yes	Yes	Yes	Yes	Changed from Transitional Salespeople Report in 11.5.6
Plan Activation Status Report	No	Yes	Yes	Yes	Yes	Yes	Yes	Changed from Plan Generation Status in 11.5.4 and Plan Status in 11.5.5
Role To Compensation Plan Mapping Report	No	Yes	Yes	Yes	Yes	Yes	Yes	Changed from Role to Plan Mapping in 11.5.4
Salesperson Plan Assignments	Yes	No	No	No	No	No	No	Replaced by Role to Plan Mapping Report in 11i.
Compensation Reports (Transaction tab)	-	-	-	-	-	-	-	-
Compensation Summary	No	Yes	No	No	No	No	No	Replaced in 11.5.4 by Year-To-Date Summary.
Compensation Details	No	Yes	No	No	No	No	No	Replaced in 11.5.4 by Year-To-Date Summary.
Compensation Details (Fiscal View)	No	Yes	No	No	No	No	No	Replaced in 11.5.4 by Year-To-Date Summary

Release	3i	11.5.3	11.5.4	11.5.5	11.5.6	11.5.7	11.5.9*	Notes
Year to Date Summary	No	Yes	Yes	Yes	Yes	Yes	Yes	Replaced 6i Compensation Summary, Compensation Details, Compensation Details (Fiscal View) in 11.5.4
Adjustments	No	Yes	No	No	No	No	No	Replaced by Transaction Details report in 11.5.4
Transaction Details	No	No	Yes	Yes	Yes	Yes	Yes	Replaced Adjustments report in 11.5.4
Compensation Group Hierarchy	No	Yes	No	Yes	Yes	Yes	Yes	Replaced by Hierarchy report in 11.5.4. HTML version introduced in 11.5.5
Salespeople Hierarchy	No	Yes	No	No	No	No	No	Replaced by Hierarchy report in 11.5.4
Hierarchy	Yes	No	Yes	No	No	No	No	Replaced Compensation Group Hierarchy and Salespeople Hierarchy reports in 11.5.4
Classification Rules	Yes	Yes	No	Yes	Yes	Yes	Yes	6i report decommissioned in 11.5.4. HTML report introduced in 11.5.5
Payrun Listing	Yes	Yes	No	No	No	No	No	After 11.5.3, information available on Payrun Details page in application
Payrun Details	No	Yes	No	No	No	No	No	After 11.5.3, information available on Payrun Details page in application
Analyst Consolidated Summary	No	Yes	No	No	No	No	No	Replaced by Commission Summary in 11.5.4
Commission Summary	Yes	No	Yes	Yes	Yes	Yes	Yes	Replaced Analyst Consolidated Summary in 11.5.4
Quota Performance	Yes	Yes	Yes	Yes	Yes	Yes	Yes	6i report in 11.5.3 replaced by HTML report of same name in 11.5.4
Commission Statement	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Appears in all releases.
Performance Details	No	Yes	No	No	No	No	No	6i report decommissioned after 11.5.3
Blind Ranking	No	Yes	No	No	No	No	No	6i report decommissioned after 11.5.3

Release	3i	11.5.3	11.5.4	11.5.5	11.5.6	11.5.7	11.5.9*	Notes
Top/Bottom Performers	No	Yes	No	No	No	No	No	6i report decommissioned after 11.5.3
Compensation Trending	No	Yes	No	No	No	No	No	6i report decommissioned after 11.5.3
Unprocessed Transactions	No	Yes	Yes	Yes	Yes	Yes	Yes	Started in 11.5.3.
Payment Hold	No	Yes	No	No	No	No	No	Decommissioned after 11.5.3
Pending Payment	No	Yes	No	No	No	No	No	Decommissioned after 11.5.3
Pending Transactions	No	Yes	No	No	No	No	No	Decommissioned after 11.5.3

4.50.21 Configuring Reports

Each JSP report has a corresponding region in the Applications Core Module. The information in that region determines what end users see displayed on their screens in the form of the reports. System Administrators can go into the Application Developer Common Modules responsibility and configure the JSP reports.

For all 18 reports mentioned below, you can change the name of the column labels in the report. For example, in the Commission Statement report, you can change the name of the *Resource Name* column to *Partner Name* if you are trying to pay partners. See Steps for Changing Label Names to perform this procedure.

Three reports can also be configured to hide or display certain columns. These reports are:

- Transaction Details
- Commission Statement
- Unprocessed Transactions

Changing Label Names

Note: Some JSP reports share the same region in the Application Core Module. Therefore, any changes you make in the region to hide or show a column affect all reports that reference the same region.

For example, the Commission Summary report and Quota Performance report share the Quota Summary region name. Also, the Commission Statement report and

Unprocessed Transactions report share the Adjustments Report region. To change label names, perform the following procedure.

Prerequisites

None

Responsibility

System Administrator

Navigation

Forms instance > File

Steps

1. Log in to the Forms version of the application as the System Administrator.
The Navigator - System Administrator screen appears.
2. Click **File** in the toolbar and select Switch Responsibility.
The Responsibilities screen appears.
3. Select Application Developer Common Modules. Click **OK**.
The Navigator - Application Developer Common Modules screen appears.
4. Double-click **Define Regions**.
The Regions screen appears.
5. Query the specific JSP name of report. See Guidelines for a table of specific Region IDs for the reports. To search, perform the following four steps:
 - a. With the cursor in the Region ID field, click **View** in the toolbar and select Query by Example > Enter from the menus. The fields turn blue.
 - b. Enter the Region ID of the report. You can enter the first part of the name followed by a percent sign (%).
 - c. Click **View** in the toolbar and select Query by Example > Run in the menus. The Regions screen appears, displaying a list of Region IDs.
 - d. Scroll down to the Region ID you want and click in the field.
6. Click the Region Items button in the lower right corner.
The Region Items screen appears.

7. Scroll over to the Long Label field and enter a descriptive name for the attribute.
8. Click **Save**.
This process changes the label name.
9. Bounce the Middle Tier server.

Hiding or Displaying Columns

These steps apply only to the Transaction Details, Commission Statement, and Unprocessed Transactions reports. To hide or display columns, perform the following procedure.

Prerequisites

None

Responsibility

System Administrator

Navigation

Forms instance > File

Steps

1. Log in to the Forms version of the application as the System Administrator.
The Navigator - System Administrator screen appears.
2. Click **File** in the toolbar and select Switch Responsibility.
The Responsibilities screen appears.
3. Select Application Developer Common Modules. Click **OK**.
The Navigator - Application Developer Common Modules screen appears.
4. Double-click **Define Regions**.
The Regions screen appears.
5. Query the specific JSP name of report. See Guidelines for a table of specific Region IDs for the reports. To search, perform the following four steps:
 - a. With the cursor in the Region ID field, click **View** in the toolbar and select Query by Example > Enter from the menus. The fields turn blue.

- b. Enter the Region ID of the report. You can enter the first part of the name followed by a percent sign (%).
 - c. Click **View** in the toolbar and select Query by Example > Run in the menus. The Regions screen appears, displaying a list of Region IDs.
 - d. Scroll down to the Region ID you want and click in the field.
6. Click the Region Items button in the lower right corner.
The Region Items screen appears.
 7. Find the Attribute or Column name in the list and then select the Node Display check box to show the column or deselect the Node Display check box to hide the column.
 8. If you are setting a column to show, scroll over to the V Align column and select **Top** from the List of Values.
 9. Scroll over to the Long Label field and enter a descriptive name for the attribute.
 10. Click **Save**.
 11. Bounce the Middle Tier server.

Guidelines

The table below displays the Region ID, Region Name, and jsp Name for each report:

Report	Region ID	Region Name	jsp Name
Year to Date Summary	CN1152_YTD_SUMMARY	Year to Date Summary	cnytdsum.jsp
Transaction Details Report	CN1152_ADJUST_DTL	Adjustments Report	cnadjdtl.jsp
Compensation Group Hierarchy Report	CN1152_CG_HIER	Group Hierarchy Report	cncghier.jsp
Classification Rules Report	CN1152_RULES	CN1152_RULES	cnclrls.jsp
Commission Summary Report	CN1152_QUOTA_SUMMARY1	Quota Summary	cnquota.jsp
Quota Performance Report	CN1152_QUOTA_SUMMARY1	Quota Summary	cnquota.jsp

Report	Region ID	Region Name	jsp Name
Commission Statement Report	CN1152_ COMMISSION	Adjustments Report	cnCommStat RepRun.jsp
Unprocessed Transactions	CN1152_ADJUST_DTL	Adjustments Report	cnunprdl.jsp
Quota Model Summary	CN_QM_SUMMARY	CN QM Summary	cnranqms.jsp
Average Quota Report	CN1152_REP_AQS	Average Quota Summary	cnranaqs.jsp
Quota Overassignment Report	CN1152_REP_OAS	Overassign Quota Sum	cnranoas.jsp
Quota Range Report	CN1152_REP_QMR	Quota Range Summary	cnranqmr.jsp
Compensation Contract Status	CN_ANAL_REP_ PLANSUMMARY	Plan Summary Region	cnranpsr.jsp
Overlay Report	CN1152_REP_OSR	Overlay Summary	cnrvaosr.jsp
Vacancy Report	CN1152_REP_TBH	To be Hired Report	cnrvatbh.jsp
Transition Report	CN1152_REP_TSR	Transitional SP	cnrvatsr.jsp
Plan Activation Status Report	CN1152_COMP_GEN_ STS	Plan Generation Status	cnrgests.jsp
Role to Compensation Plan Mapping	CN1152_ROLE_PLAN_ MAP	Role Plan Mapping	cnrgemap.jsp

Part III

Post Implementation Tasks

This section of the Oracle Incentive Compensation Implementation Guide contains the following chapters:

- [Chapter 5, "Verify the Implementation"](#)
- [Chapter 6, "Diagnostics and Troubleshooting"](#)

Verify the Implementation

5.1 Oracle CRM Application Foundation Implementation Verification Tasks

This chapter contains material useful in verifying the implementation of the Oracle CRM Application Foundation modules and Oracle Incentive Compensation.

5.1.1 Use the Diagnostic Tests

After completing the implementation steps of the Application CRM Foundation module, run the entire suite of diagnostic tests available through the HTML Administrator Console. Implementors would most likely either verify using the Basic tab or the Advanced tab. In the Basic tab, you can run the following tests:

- RunAll
- UserTest
- AOLTests
- PropertyManager
- UserProfile
- AKData
- Security Manager

In the Advanced tab, you can modify the parameters used in the previously mentioned tests.

Each test generates a report if a problem is encountered. The report identifies the problem and provides a suggested resolution to the problem.

5.1.2 Verification Task List per Module

After you complete the configuration and setup of all the Oracle CRM Application Foundation modules, verify that you can perform the tasks outlined in the following table.

Table 5–1 CRM Application Foundation Verification List

JTF Module	Task	Reference
HTML Tech Stack	Login to HTML Applications as System Administrator	<i>Oracle CRM Technology Foundation Concepts and Procedures</i>
User Management	Register and approve a new user	<i>Oracle CRM Technology Foundation Concepts and Procedures</i>
Resource Manager	Creating an employee resource	<i>Oracle CRM Application Foundation Implementation Guide</i>
Resource Manager	Creating a group resource	<i>Oracle CRM Application Foundation Implementation Guide</i>
Resource Manager	Importing resources	<i>Oracle CRM Application Foundation Implementation Guide</i>
Resource Manager	Defining a resource group	<i>Oracle CRM Application Foundation Implementation Guide</i>
Resource Manager	Defining a resource team	<i>Oracle CRM Application Foundation Implementation Guide</i>

You must be able to complete each task successfully, or your Oracle CRM Application Foundation modules will not work properly. If you are unable to complete a task successfully, then correct the problem before continuing.

5.2 Confirmation of Minimum Setups in Oracle Incentive Compensation

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. It is described in [Section 5.2, "Confirmation of Minimum Setups in Oracle Incentive Compensation"](#). For additional information refer to Implementation Guide Chapters 4 and 5.

5.2.1 Define Profile Options

Prerequisites

None

Responsibility

System Administrator

Navigation

(Forms) Profile > System

Steps

1. Enter values for the fields as follows:
 - Site: Check
 - Application: Uncheck
 - Responsibility: Uncheck
 - User: Uncheck
 - Profiles with no value: Uncheck
 - Profile: OSC:%
2. Click **Find**.
3. See Implementation Guide Appendix C for a listing of profile options.

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

5.2.2 Define System Parameters

Prerequisites

None

Responsibility

Incentive Compensation Super User

Navigation

Administration > Parameters

Steps

See *Oracle Incentive Compensation User Guide* Section 12.2 System Parameters.

Guidelines

The STATUS will change to active once the first accumulation period is changed from 'Never Opened'. If the System Parameters Status is INACTIVE, users may be able to access OIC screens, but will not be able to utilize most of the functions.

5.2.3 Define GL Calendar: Period Types

Use this form to define your accounting period types.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Navigation

Administration > General > Calendar Type

Steps

See Period Type (in Setup Chapter) of the *Oracle General Ledger User Guide Release 11i* for this procedure.

Guidelines

Do not create Period Types if they already exist.

Example:

Period Type	Periods Per Year	Year Type
Month	12	Calendar
Quarter	4	Fiscal
Year	1	Fiscal
Month	12	Fiscal

5.2.4 Administer Accumulation Periods

Specify the accounting periods you will include 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.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Navigation

Administration > Incentive > Accumulation Period

Example:

Name	Year	Qtr	Start Date	End Date	Period Status	Forecast	Freeze
Jun-02	2003	1	01-Jun-2002	30-Jun-2002	Future-Entry	Checked	Unchecked
Jul-02	2003	1	01-Jul-2002	30-Jul-2002	Future-Entry	Checked	Unchecked

Name	Year	Qtr	Start Date	End Date	Period Status	Forecast	Freeze
Aug-02	2003	1	01-Aug-2002	30-Aug-2002	Future-Entry	Checked	Unchecked
Sep-02	2003	2	01-Sep-2002	30-Sep-2002	Future-Entry	Checked	Unchecked
Oct-02	2003	2	01-Oct-2002	30-Oct-2002	Future-Entry	Checked	Unchecked
Nov-02	2003	2	01-Nov-2002	30-Nov-2002	Future-Entry	Checked	Unchecked
Dec-02	2003	3	01-Dec-2002	30-Dec-2002	Future-Entry	Checked	Unchecked
Jan-03	2003	3	01-Jan-2003	30-Jan-2003	Future-Entry	Checked	Unchecked
Feb-03	2003	3	01-Feb-2003	30-Feb-2003	Future-Entry	Checked	Unchecked
Mar-03	2003	4	01-Mar-2003	30-Mar-2003	Future-Entry	Checked	Unchecked
Apr-03	2003	4	01-Apr-2003	30-Apr-2003	Future-Entry	Checked	Unchecked
May-03	2003	4	01-May-2003	30-May-2003	Future-Entry	Checked	Unchecked

Guidelines

Period Status '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 will not be allowed until the Period Status is set to 'Opened'.

See: Oracle Incentive Compensation User Guide, Section 12.5 Accumulation Periods.

5.2.5 Define Interval Numbers

Use this form to update Interval Numbers

See *Oracle Incentive Compensation User Guide* Section 12.7.1 To View an Interval Type.

Prerequisites

None

Responsibility

Incentive Compensation Super User

Navigation

Administration > Interval Types

Steps

1. Click the Period link

Period Name	Start Date	End Date	Year	Interval Number
JUN-02	01-JUN-02	30-JUN-02	2003	2003001
JUL-02	01-JUL-02	31-JUL-02	2003	2003002
AUG-02	01-AUG-02	31-AUG-02	2003	2003003
SEP-02	01-SEP-02	30-SEP-02	2003	2003004
OCT-02	01-OCT-02	31-OCT-02	2003	2003005
NOV-02	01-NOV-02	30-NOV-02	2003	2003006
DEC-02	01-DEC-02	31-DEC-02	2003	2003007
JAN-03	01-JAN-03	31-JAN-03	2003	2003008
FEB-03	01-FEB-03	28-FEB-03	2003	2003009
MAR-03	01-MAR-03	31-MAR-03	2003	2003010
APR-03	01-APR-03	30-APR-03	2003	2003011
MAY-03	01-MAY-03	31-MAY-03	2003	2003012

2. Click the Quarter link.

Period Name	Start Date	End Date	Year	Interval Number
JUN-02	01-JUN-02	30-JUN-02	2003	2003001
JUL-02	01-JUL-02	31-JUL-02	2003	2003001
AUG-02	01-AUG-02	31-AUG-02	2003	2003001
SEP-02	01-SEP-02	30-SEP-02	2003	2003002
OCT-02	01-OCT-02	31-OCT-02	2003	2003002
NOV-02	01-NOV-02	30-NOV-02	2003	2003002
DEC-02	01-DEC-02	31-DEC-02	2003	2003003
JAN-03	01-JAN-03	31-JAN-03	2003	2003003
FEB-03	01-FEB-03	28-FEB-03	2003	2003003
MAR-03	01-MAR-03	31-MAR-03	2003	2003004

Period Name	Start Date	End Date	Year	Interval Number
APR-03	01-APR-03	30-APR-03	2003	2003004
MAY-03	01-MAY-03	31-MAY-03	2003	2003004

3. Click the Year link.

Period Name	Start Date	End Date	Year	Interval Number
JUN-02	01-JUN-02	30-JUN-02	2003	2003
JUL-02	01-JUL-02	31-JUL-02	2003	2003
AUG-02	01-AUG-02	31-AUG-02	2003	2003
SEP-02	01-SEP-02	30-SEP-02	2003	2003
OCT-02	01-OCT-02	31-OCT-02	2003	2003
NOV-02	01-NOV-02	30-NOV-02	2003	2003
DEC-02	01-DEC-02	31-DEC-02	2003	2003
JAN-03	01-JAN-03	31-JAN-03	2003	2003
FEB-03	01-FEB-03	28-FEB-03	2003	2003
MAR-03	01-MAR-03	31-MAR-03	2003	2003
APR-03	01-APR-03	30-APR-03	2003	2003
MAY-03	01-MAY-03	31-MAY-03	2003	2003

5.2.6 Assign User Name to Tables

Define the user names for tables depending on desired usage.

See *Oracle Incentive Compensation User Guide* Section 12.3 Tables.

Prerequisites

None

Navigation

Administration > Tables

Responsibility

Incentive Compensation Super User

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
CN	CN_SRP_PERIOD_QUOTAS	CN_SRP_PERIOD_QUOTAS	CSPQ	NA	Calculation
CN	CN_SRP_QUOTA_ASSIGNS	CN_SRP_QUOTA_ASSIGNS	CSQA	NA	Calculation

5.2.7 Define Table Column Settings

Define the column settings for the desired tables.

See *Oracle Incentive Compensation User Guide* Section 12.3.1 Columns.**Prerequisites**

None

Responsibility

Incentive Compensation Super User

Navigation

Administration > Tables > Columns

5.2.8 Define Report ConfigurationSee: *Oracle Incentive Compensation User Guide* Section 11.5 Configuring Reports.

NOTE: Remember that changes will not be 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 will alter 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.

Diagnostics and Troubleshooting

This chapter contains material useful in troubleshooting the implementation of Oracle Incentive Compensation.

6.1 Common Questions and Answers

Q: I can't find Sales Compensation in the Role Type list of values.

A: In this 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' ;
```

The correct output for the above query is below:

TABLE_NAME	Nullable
CN_PLAN_TEXTS	Y
N_ROLE_MODELS_ALL	N
CN_ROLE_PLAN_MAPS	Y
CN_ROLE_QUOTA_CATES	Y
CN_SRP_QUOTA_CATES_ALL	Y

TABLE_NAME	Nullable
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);
```

Q: Can I change a role type or delete a role if it already assigned to any resources?

A: No. This can cause corrupted data in the system. Only the member flag and manager flag can be updated.

Q: Why does a transaction fail classification / rollup / population / calculation?

A: For some possible reasons of failure, see Oracle Incentive Compensation User Guide Section 9.1.3 Phases of Calculation.

Q: Why can't the user view their commission reports?

A: Freeze Periods

This check box, found on the Accumulation Periods page, controls the ability for Oracle Sales Online users to execute Commission Statement or YTD Summary reports.

If resources have been assigned compensation plans and commissions have been calculated, but Oracle Sales Online users are reporting that they cannot view their Oracle Incentive Compensation-related reports, check the Freeze Period check box for the corresponding periods.

Note that the Freeze Period check box does not affect Oracle Incentive Compensation responsibilities, and only applies to users using Oracle Sales Online responsibilities to access Oracle Incentive Compensation reports.

See *Oracle Incentive Compensation User Guide* Section 12.5 Accumulation Periods for more information.

Q: Why do payruns contain negative payment amounts?

A: Payment Plan Minimum Payment Amount

A common situation is where calculated commissions for a resource result in a negative balance due to adjustments, take-backs, or other circumstances. Depending on the business requirements, the user may or may not want negative payments appearing in the payrun. To prevent this, create a payment plan with a minimum payment amount of 0, and assign it to any resource who should not have negative payment amounts in the payrun.

See *Oracle Incentive Compensation User Guide* Section 12.15 Payment Plans for more information.

Q: Why does calculate / load transaction / setup task not work for period 2 when it worked for period 1?

A: Accumulation Period Status

The Period Status of an Accumulation Period can affect many parts of the application. Here is a description of the different Period Statuses:

Never Opened: This period has never been used by Oracle Incentive Compensation, there will be no setups or transactions for this period.

Future-Entry: This period is available for the creation of setups such as Compensation Plans or Rulesets. No Transactions can be loaded or created for this period, nor can Calculations be submitted. This status is recommended for initial setup stages where no transactions or calculations are expected.

Open: This period is available for full usage.

Closed: Users wish this period to be preserved as is. No transaction adjustments, new transactions or calculations are allowed. However, a period with status Closed can be reopened if desired.

Permanently Closed: This period is Closed and cannot be re-Opened.

See *Oracle Incentive Compensation User Guide* Section 12.5 Accumulation Periods for instructions on setting the Period Status.

Q: Why does the YTD Summary report execute but return no data?

A: Plan Element Quota Group Code / Accumulation Period Status

This issue assumes that the resource in question has a valid plan assigned and calculated transactions. Also, the YTD Summary Report actually runs, but appears to contain no information. There are two items to check first:

- Plan Element Quota Group Code. In order for a plan element's data to be displayed on the YTD Summary Report, it must be assigned a Quota Group Code of Quota or Bonus. If not, it will not appear on the report. See *Oracle Incentive Compensation User Guide* Section 6.7 Defining Plan Elements for instructions on setting the Quota Group Code.
- Accumulation Period Status. If the accumulation period has not been opened, it will not appear on the YTD Summary Report. This is because, if the period has never been opened, there will not be any commissions-related data for that period. See *Oracle Incentive Compensation User Guide* Section 12.5 Accumulation Periods for instructions on setting the Period Status.

Q: Why is a Group by Interval type calculation always returning zero commission?

A: Interval Types Interval Number

The interval numbers for each period must be unique in order for a grouped by interval formula to calculate correctly.

See *Oracle Incentive Compensation User Guide* Section 12.7 Interval Types for information on setting the Interval Number.

Q: How can an attribute column be added to the Adjustments page?

A: Columns settings for the CN_COMMISSION_HEADERS table

To affect which attribute columns appear in the Adjustments page, navigate to the Columns page and appropriately edit the Value check box under Classification View and the Usage check box under Columns View. The displayed column heading is the User Name value under the Classification View.

If the Value and Usage boxes are checked, the column will be displayed.

See *Oracle Incentive Compensation User Guide* Section 12.3.1 Columns for navigation steps and additional information.

Q: When commission for Salesperson A is calculated, Manager B is not receiving commission, even though credit should roll from A to B, and B's compensation plan should pay some commission. What's going on?

A: Calculation Submission parameters.

While there are many possible reasons why a receiver of rollup credit should not receive commissions, a case such as the one above assumes that the manager definitely should receive credit and commission, but for some reason is not. This means that resources are linked in the rollup hierarchy with appropriate dates, that the manager has an active compensation plan for the appropriate dates, as well as all other appropriate setups.

The first thing to check is the method of submitting calculation. If the calculation was submitted with Resource Option other than All Resources, which would have included Salesperson A but not Manager B, the explanation is that Manager B would be receiving the rollup credit, but that credit has not yet been calculated. Running a Transaction Details report for Manager B should show Unprocessed rollup credit from Salesperson A.

To avoid this situation, submit calculations with Resource Option All Resources, or specify Manager B and check the Entire Hierarchy box. This will calculate for Manager B and any subordinates.

See *Oracle Incentive Compensation User Guide* Section 9.4 Submitting Calculations for steps of calculation submission.

Q: What are the rules of credit rollup?

A: There are a few basic rules governing credit rollup.

The rules for credit rollup are:

- If a member of a resource group receives direct credit (via collection or transaction adjustments), all managers of that group will receive rollup credit.
- If resource group A is the parent of resource group B, all credit entering resource group B (either directly or via rollup) will be rolled up to all members and managers of resource group A.

- If the profile option OSC: Multi Rollup Path is set to Yes, credit directly received by a resource will roll up through all applicable resource groups. Otherwise, the credit will only roll up through one of the possible paths.
- If resource group A contains no members or managers, credit can still roll up from a child group to any parents of group A.
- The path of credit through the resource groups and credit receivers is determined by the rollup date associated with the credit and the start and end dates of the resource groups and the resources' group member roles.

See *Oracle Incentive Compensation Implementation Guide* Appendix C System Profile Options for information on the Multi Rollup Path profile option.

Q: What is the rule regarding the boundaries of rate table tiers?

A: The highest tier is utilized.

When rate tables are defined, the upper bound of one tier is displayed as equal to the lower bound of the next highest tier. For example:

0-25% = 1%

25-50% = 2%

50-75% = 3%

75-100% = 4%

If an Input Expression generated a value of 25%, what Rate Table Result would be returned from this rate table? The answer would be 2%; the application will take the higher tier, or in other words, 0-25% can be interpreted as "from 0% up to but not including 25%".

Note that the usual case is a transaction that will cross a tier boundary. In these situations the split parameter becomes important. For example, if the non-proportional split is selected, a transaction that crosses the 25% boundary would result in two split transactions, one that applies to an Input Expression value up to 25%, at 1% Rate Table Result, and another that applies to an Input Expression value of 25% and up, at 2% Rate Table Result.

Q: What happens when a rate table has no appropriate tiers?

A: The closest tier is utilized.

Rate tables are defined to encompass a range of possible values, but do not always cover all the possibilities. For example:

0-25% = 1%

25-50% = 2%

50-75% = 3%

75-100% = 4%

If an Input Expression returns a value of 150%, what Rate Table Result would be returned? The answer: 4%. The application will utilize the closest possible tier. This applies on either end of the table: a value of negative 50% would return a Rate Table Result of 1%.

Understanding this behavior is important in the case where a user wishes no commission to be calculated outside of the defined tiers. In this case, additional tiers can be added.

-100-0% = 0%

0-25% = 1%

25-50% = 2%

50-75% = 3%

75-100% = 4%

100% - 999% = 0%

Q: After assigning a compensation plan to a role and the role to a resource, the resource does not have an assigned compensation plan.

A: Check to see if a pay group has been assigned to the resource.

If the resource does not yet have a pay group assigned, assigning a role to the resource will not always result in the assignment of a compensation plan. If a pay group is assigned to the resource after the role assignment, the compensation plan

will be visible as attached to the resource. Note that the end date of the compensation plan assignment may change to equal the end date of the pay group assignment.

Q: When using the split transaction functionality, what are the restrictions regarding split percentage?

A: It depends on the original transaction's split percent value.

When adjusting a transaction, the original transaction will have a value of Split Percent. The general rule is that the sum of the Split % values entered in the Split Transaction screen must equal the original transaction's Split Percent value, unless the Split Percent value is 0.

- Example 1: Transaction has original Split Percent of 100%. If this transaction is split, the Split % values must add up to 100 : 70 + 30, 50 + 50, etc. In this case, the transaction amount of the original transaction will be split using the given percentage values.
- Example 2: Transaction has original Split Percent of 70%. If this transaction is split, the Split % values must add up to 70 : 30 + 40 , 20 + 50, etc. In this case, the transaction amount of the original transaction will be split proportionally using these values: 30 + 40 would equal one split at 30/70 of the original amount, and the other at 40/70 of the original amount.
- Example 3: Transaction has original Split Percent of 0% (perhaps the value was not collected). If this transaction is split, the Split % values can add up to any value : 100 + 40 , 20 + 25, etc. In this case, the transaction amount of the original transaction will be split using the given percentage values.

Q: While trying to access the Administration Tab, I receive this error: "Failed to get sales group ID or sales role for the current user. User must have at least one role in a valid sales group."

A: The profile option 'Bypass Group Validation' can be set to 'Y' to avoid this error. Set the profile at the appropriate level to maintain desired access levels.

Q: A resource has two roles assigned for the same date (in different resource groups). Each role has an associated agreement. Why aren't both agreements visible for the planning process?

A: Each agreement needs to be processed separately. Once that is done, the other agreement(s) will be visible.

This means that each agreement has to be taken through the entire process of Submit, Generate, Approve, and Accept. At that point, the other applicable agreements will be available for the same process. Likewise, Resource Activation has to be done for one contract at a time.

Q: When querying for a sales role in the Resource Details page, the compensation plan information is displayed, but no plan elements are shown.

A: Once the compensation plan is displayed, click the name (which should be a hyperlink) and the plan elements are displayed.

Part IV

Integration of Oracle Products

This section of the Oracle Incentive Compensation Implementation Guide contains the following chapter:

- [Chapter 7, "Integrating Oracle Incentive Compensation With Other Oracle Products"](#)

Integrating Oracle Incentive Compensation With Other Oracle Products

Oracle Incentive Compensation integrates with other applications in the Oracle e-Business Suite to optimize the functions of the product. Interface programs systematically link two or more systems to each other. With Oracle Incentive Compensation and custom interfaces, you can accomplish some of the critical tasks of an incentive compensation process:

- Collect sales transaction data from Oracle Receivables, Oracle Order Management, and other sources
- Pay supplier contract type resources using Oracle Accounts Payable
- Integrate with Oracle Payroll for employee type resources
- Generate reports related to compensation and other useful sales benchmarks (see 5.50).
- Use Oracle Sales Online for Income Planner and resource self service needs

Using Oracle CRM Foundation Resource Manager module, you can:

- Maintain sales roles and compensation groups
- Maintain resource information

As a customization, you can create multiple interfaces, referred to as application programming interfaces (APIs), to bring transactions into Oracle Incentive Compensation and to send transactions out to other systems. Oracle Incentive Compensation transactions can originate from a sales order, a customer billing, a customer payment, or other business functions.

7.1 Overview

Oracle Incentive Compensation exchanges information with other products within the Oracle e-Business Suite. Transactions, the raw material that fuels Oracle Incentive Compensation, are primarily derived from Oracle Receivables and Oracle Order Management.

Oracle Receivables and Oracle Order Management provide sales transaction information that forms the basis for calculating incentive compensation.

Examples of the types of transaction data Oracle Receivables can provide include:

- Invoices
- Credit and debit memos
- Payment postings
- Write-off postings
- Take-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.

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 Incentive Compensation, as well as all other applications in the Oracle e-Business Suite, must use the Oracle Quoting - Forms module to interface to Order Management.

Resource Manager is the common source for resource definition, and 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

In addition to these traditional sources of information, release 11*i* of Oracle Incentive Compensation provides two-way integration to applications such as

Oracle Sales Online, Business Intelligence Systems (BIS), and other applications within the e-Business Suite.

Oracle Sales Online provides a sales performance and compensation forecasting tool for sales representatives and managers, based on current compensation plans. It is also a means for monitoring sales force performance through self-service compensation reports, the Year-to-Date Commission Summary and the Quota Performance Report. Resources can view their compensation summary and break down their commissions by deal, product line, period, adjustments, or transactions. They can also use Sales Online to view projected compensation based on opportunities they enter into the system or commit to the forecast.

Compensation information is also made available to Oracle Sales Intelligence.

7.2 Oracle Sales Online

The Compensation tab > Compensation Plan subtab in Oracle Sales Online can be used by:

- A resource to accept a compensation plan.
- A manager to view the performance of directs.
- A manager to distribute compensation plans for resources in his or her hierarchy.

If resources have access to Oracle Sales Online, they can submit their estimate of their own Quota and either accept or reject their Compensation Plans when the Plans are distributed to them by their manager via Oracle Sales Online.

Perform the following procedure to enable access to the Compensation tab in Oracle Sales Online.

Prerequisites

System Administrator responsibility is required. This procedure is performed in the Forms version of Oracle Incentive Compensation.

Steps

1. Create an employee in HRMS manager.
2. Import the resource into Resource Manager.
3. Create a username and password for the resource in System Administrator with Oracle Sales Online usage.

4. In the System Administrator Navigator, select Security.
5. Expand the Security menu by double-clicking on Security.
6. Double-click User.
7. Double-click Define.
8. 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.)
9. Assign Sales Online User responsibility to the user.
10. In Resource Manager, assign the role type of Sales to the user with a manager or member role.
11. Assign Group usage Sales and Telesales for the group to which the user belongs.
12. Create all compensation plan setups in the HTML version of Oracle Incentive Compensation.
13. To log in to Oracle Sales Online, use the username and password that were created in step 3.

7.2.1 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. Super user can control which plan element appears as a quota or bonus category through the Quota Group check box on the Plan Element form. The pay out section is grouped by earnings type and by period.

Prerequisites

You must have access to Oracle Incentive Compensation through Oracle Sales Online.

Steps

1. Click the Compensation tab and click the Year to Date Summary subtab.
2. Select a credit type from the drop-down list. Functional Currency is the default setting.

3. Select a reporting currency from the drop-down list. Functional Currency is the default setting.
4. Select a fiscal year from the drop-down list.
5. Click **Apply**.

7.2.2 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.

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 pop-up calendar.
4. Any compensation groups within the parameters is displayed below.

Guidelines

For more information, see Incentive Planning in Chapter 5.

7.2.3 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.

Steps

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

7.2.4 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 Sales Online to access Income Planner.

Before you can use Income Planner in Oracle Sales Online, 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 Sales Online.

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

To enable Income Planner in Oracle Sales Online, perform the following procedures in Oracle Incentive Compensation.

Steps

To create Forecast expressions, do the following:

1. Click the Incentive tab and click the Expression subtab.
The Calculation Expression page appears.
2. Click Create to open a blank page.
3. Enter a name for the input formula.
4. In the Details area, enter Forecast Expressions from the Type drop down list.
5. In the Expression Block, select your Expression fields. Forecast Amount **MUST** be one of the elements selected as part of your expression if it is to be used in Oracle Sales Online.
6. Click Update to save your input expression.
7. Repeat steps 2 through 6 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.

8. 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 Assign Expressions to open the Assign 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 to save your work.
7. Perform this series of steps for each formula in your compensation plan.
8. When making revisions to a saved page, click Restore to return to the previously saved version.

Guidelines

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. The commission rate chosen depends on the resource's achievements to date as compared to the commission rate tiers.

A forecast amount based on each plan element is displayed if the Interest Type 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.

7.2.5 Reports

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

- **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.

- **Commission 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.

Prerequisites

You must have access to Oracle Incentive Compensation through Oracle Sales Online.

Steps

1. Log on to Oracle Sales Online.
2. Click the Compensation tab and click the Reports subtab.
3. Click a link in the Report Name column to open that report.
4. In the My Reports area you can work with customized versions of reports which have been saved to be used again.
 - a. To see the stored parameters, click the link in the Report Name Column.
 - b. To run the report, click **Run Report**.
 - c. To delete the report, check the Remove check box and click **Update**.

7.2.6 Top Performers Bin

The Top Performers bin in Oracle Sales Online 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.

To set up the Top Performers bin on your Oracle Sales Online home page, perform the following procedure.

Steps

1. Log on to Oracle Sales Online.
2. Click the Profile icon in the upper right.
A side panel menu opens.
3. Under Sales Online, click the Home Page link.
The Home Page Preferences page appears.
4. 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.
5. Click **Add New Rows**.
The Narrow Bin Preferences area expands and fields become available in the Bin Name column.
6. 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.
7. In the Bin Name column, select Top Performers from the drop-down list.
8. Click **Update**. A confirmation message appears at the top of the page.
9. Click the Home tab.
The Top Performers bin is displayed in the upper left part of the page.
10. You can edit the parameters of the Top Performers bin. Click **Edit** in the bin itself or during setup steps 7 through 9 above.

The Top Performers Parameters page appears. Select appropriate scaling from the drop-down list.

To make sure that current data is displayed in bins on the home page, Oracle Sales Online 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:

Prerequisites

Oracle Sales Administrator responsibility in Forms.

Steps

1. Log into Forms.
2. Select System Administrator responsibility and navigate to Security > Responsibility > Define.
3. Query for Oracle Sales Administrator. (See Guidelines).
4. Note down the request group (Sales and Marketing Super User) that the responsibility belongs to. (See Guidelines)
5. Return to the Navigator window and navigate to Security > Responsibility > Requests.
6. Query for the Sales and Marketing Super User request group.
7. In the Requests area, add the Refresh Top Performers Report request.
8. Save.
9. Switch the responsibility to Oracle Sales Administrator.
10. Run these concurrent requests:
 - AS_PERIOD_DAYS refresh
 - AS_PERIOD_RATES refresh
 - Refresh Top Performers

Guidelines

Setting up the Top Performers Bin (steps 1-8) needs to be done only once. Refreshing the bins (steps 9 and 10) is done whenever the information in the bins needs to be refreshed.

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.

7.2.7 Forecast Hierarchy Drilldown to Year to Date Summary

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

Steps

1. Click the Forecast tab.
The Forecast page appears.
2. In the Subordinate Forecasts area, click the icon in the Compensation column to the far right of the table.
3. The Year to Date Summary page appears.

7.3 Oracle Resource Manager

Defining Roles

A Role may encompass one or more job descriptions and job titles. Use Roles to assign jobs to resources, resource groups and resource teams. Oracle Resource Manager is delivered with pre-defined Roles for all CRM modules. Use this procedure to define additional custom Roles for your enterprise.

Prerequisites

Make sure that a Role Type exists with which you can associate the new Role.

Steps

1. In the CRM Resource Manager responsibility, navigate to **Setup > Roles**.
The Roles window displays fields you can use to define a role.
2. Enter your values in the Code and Name fields. Choose a Role Type from the list of values. For Incentive Compensation choose Incentive Compensation.
3. Select the Active box to make the Role active. Select one or more of the job title boxes—Manager, Member, Admin, Lead—to associate the Role to job titles.
4. Use one or more of the Job lines to describe jobs associated with the Role.

5. Select File > Save to complete the Role definition.

7.4 Oracle Payable

Oracle Payable recognizes resources for payment only if they are activated as Suppliers through Oracle Purchasing. To pay full-time, regular employees, use Payroll. Please refer to Oracle Purchasing documentation.

When 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. When activated, the user will send payrun details to the Oracle Payable Invoices Interface table.

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

AP_INVOICES_INTERFACE	Populated with
INVOICE_ID	AP_INVOICES_INTERFACE_S.NEXTVAL
INVOICE_NUM	CN_POSTING_DETAILS_SUM.POSTING_DETAIL_SUM_ID
INVOICE_DATE	CN_PAYRUNS.PAY_DATE
VENDOR_ID	FND_USER.SUPPLIER_ID
VENDOR_SITE_ID	PO_VENDOR_SITES.VENDOR_SITE_ID
INVOICE_AMOUNT	CN_PAYMENT_TRANSACTIONS
INVOICE_CURRENCY_CODE	FUNCTIONAL CURRENCY CODE
PAYMENT_CURRENCY_CODE	REP CURRENCY CODE
SOURCE	"OSC" (NEW quick code of type SOURCE)

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	CNPD.COMMISSION_LINE_ID
LINE_TYPE_LOOKUP_CODE	ITEM/ TAX / MISCELLANEOUS
AMOUNT	CNPD

The Liability Account will also be mapped to the Oracle Payable Interface. This will be done using the account generator, accessible via the Ruleset Form or liability account information entered at the plan element or revenue class level.

7.5 Oracle Payroll

You can integrate Oracle Incentive Compensation with Oracle Payroll for employee type resources. After setting up a resource in Resource Manager and assigning the resource to a role with compensation plan, you must map a plan element from the compensation plan to a pay element in Payroll. This procedure is detailed below.

7.5.1 Mapping Plan Elements to Pay Elements

After the tables are registered you can map the plan element to the pay elements using the following procedure.

Navigation

Administration > Incentive > Payroll

Prerequisites

Plan elements and pay elements must already be created.

Steps

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

1. Click the Administration tab and the Incentive subtab.
2. Click the Payroll link on the side panel menu.
The Payroll Mapping page appears.
3. Enter the changes. Click **Go** to open a pop-up list of choices, or the calendar icon to open a calendar.
4. Check the Remove check box if you want to eliminate the plan element to pay element mapping.
5. Check the Inactive Employees check box if you want to keep the mapping but not use it now.

Steps 2 and 3 are completed when you click **Update**.

6. You can click the Element Input link to go to the Pay Element Input Values Mapping page.
7. Click **Update**.
8. If necessary, click **Restore** before clicking **Update** to return to the previously stored information.

To enter a new mapping, perform the following procedure.

1. Enter a plan element in the first blank plan element field. Click **Go** to use a pop-up list.
2. Enter the pay element from Payroll that you want to use.
3. Enter a Start Date and an End Date.
4. If necessary, click **Restore** to return to the previously saved information.
5. Click **Update** to save your mapping.

7.5.2 Mapping Pay Element Input Values

After you have mapped the pay elements to the plan elements, use this page to map table and column names to Payroll input values. Input values that have already been mapped are displayed. To map table and column names to Payroll input values, perform the following procedure.

Navigation

Administration > Incentive > Payroll > Element link

Prerequisites

Plan elements and pay elements must already be created.

Steps

1. Click Administration tab and the Incentive subtab.
2. Click the Payroll link in the side panel menu.
The Payroll Mapping page appears.
3. Click the link in the Element column.
The Pay Element Input Values Mapping page appears.

4. Enter a table name in the first blank field in the Table Name column. Click **Go** to open a pop-up list.
5. Enter a column name in the Column Name column. Click **Go** if needed.
6. In a line that is not yet saved, click the eraser icon to clear the fields.
7. To remove a saved line, check the check box in the Remove column.
8. If necessary, click **Restore** to return to previously saved information.
9. Click **Update** to save.

Part V

Appendices

This section of the Oracle Incentive Compensation Implementation Guide contains the following appendices:

- [Appendix A, "Flexfields"](#)
- [Appendix B, "Lookups"](#)
- [Appendix C, "System Profile Options"](#)
- [Appendix D, "Road Map"](#)
- [Appendix E, "Responsibilities"](#)

Flexfields

A.1 Flexfields

Flexfields are used for classification of transactions, in defining plan elements, and in setting up compensation plans. Use a flexfield when you want to set up a text field that is preset with a recognizable name and a specific type of data that it will accept. For example, a field can be called Item Number, and be set up to be a five-character numeric field. This helps minimize entry errors.

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:

Flexfield Name	Flexfield 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. A Context Value field appears on the Transaction Detail - Adjust page.
- CN Compensation Plans

A Context Value text field appears on the Compensation Plan Details page (Incentive > Plan).

- CN Quotas

These flexfields are used with plan elements to define attributes used in expressions.

See the *Oracle Applications Flexfields Guide* for information about setting up flexfields.

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.

To view lookups, perform the following procedure.

Prerequisites

Log in as the Incentive Compensation Developer responsibility in the Forms version of the application.

Steps

1. In the Navigator - Incentive Compensation Developer window, double-click **Lookups**.

The Oracle Sales Compensation Lookups window appears.

2. Press the F11 key.

The four search fields turn blue.

3. Enter Oracle Sales Compensation in the Application field.

4. In the Toolbar, click View.

5. Press Control and the F11 key.

The first lookup appears.

6. 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.

To edit or add values to a lookup, perform the following:

1. Perform steps 1 to 6 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 check box is automatically selected. Change these as needed.
5. Save your work.

To add a new lookup, perform the following:

Steps

1. In the Navigator - Incentive Compensation Developer window, double-click **Lookups**.

The Oracle Sales Compensation Lookups window appears.

2. Click the Application field and select Oracle Incentive Compensation from the drop-down list.
3. Enter a name in the Type field. Use all caps with underlines between words.
4. Enter a user name in the User Name field.
5. Enter a description in the Description field if you wish.
6. 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.
7. Type in effective dates or click the calendar icons to enter dates from a graphic calendar. Select the Enable check box if you want the lookup to be operational within the effective date range.
8. Save your work.

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 version of Oracle Incentive Compensation, these period_ids are no longer used. Use actual start and end dates instead.

The following table lists Oracle Incentive Compensation Lookups, including a description, Access Level, and Seeded Values and Meanings.

OIC Lookup Type	Description	Lookup Code and Meaning
ACCESS_CODE	Access Code	UPDATE (Update) VIEW (View)
ACTIVATE_STATUS	Plan Activate Status	CREATED (Created) 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)

OIC 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)

OIC Lookup Type	Description	Lookup Code and Meaning
AMS_CUSTOM_SETUP_OBJECTS	Parent Object for Cue Cards	PLAN_ELEMENT (Plan Element)
AMS_SYS_ARC_QUALIFIER	AMS System Architecture Qualifier: Cue Card Codes and Meanings	PE_ARC (Revenue Classes) PE_ART (Rate Tables) PE_DTLS (Main)
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)
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)
CALCULATION_TYPE	Types of Calculation	BONUS (Bonus) COMMISSION (Commission)

OIC Lookup Type	Description	Lookup Code and Meaning
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)

OIC 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)

OIC 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)

OIC 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)

OIC Lookup Type	Description	Lookup Code and Meaning
DELIMITER_TYPE	Delimiter Type	COMMA (Comma) QUOTE (Single Quotation) DOUBLEQ (Double Quotation) SEMICOL (Semi-colon) SPACE (Space) TAB (Tab)
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)

OIC Lookup Type	Description	Lookup Code and Meaning
EVENT_NAME	Event Name	<p>CHANGE_CLS_HIER (Change a hierarchy used in classification)</p> <p>CHANGE_CLS_HIER_DATE (Change a hierarchy date used in classification)</p> <p>CHANGE_CLS_HIER_DELETE (Delete a hierarchy interval used in classification)</p> <p>CHANGE_CLS_HIER_PERIOD (Change a hierarchy interval used in classification)</p> <p>CHANGE_CLS_RULES(Change classification rules)</p> <p>CHANGE_CLS_RULES_ATTR (Change classification rules attribute)</p> <p>CHANGE_CLS_RULES_DATE (Change classification ruleset date range)</p> <p>CHANGE_CLS_RULES_HIER (Change classification rules hierarchy)</p> <p>CHANGE_CLS_RULES_REV (Change classification rules revenue class)</p> <p>CHANGE_CLS_RULES_SET (Change classification rules set)</p> <p>CHANGE_COMP_PLAN (Change compensation plan)</p> <p>CHANGE_COMP_PLAN_OVER_LAP_FLAG (Change compensation plan overlap flag)</p> <p>CHANGE_COMP_PLAN_PERIOD (Change compensation plan effective interval)</p> <p>CHANGE_CP_ADD_MGR (Add a manager to a compensation group)</p> <p>CHANGE_CP_ADD_SRP (Add a salesperson to a compensation group)</p>

OIC 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)

OIC Lookup Type	Description	Lookup Code and Meaning
EVENT_NAME (continued)	Event Name	<p>CHANGE_QUOTA_DATE (Change plan element date range)</p> <p>CHANGE_QUOTA_PERIOD (Change plan element effective interval)</p> <p>CHANGE_QUOTA_POP (Change plan element revenue class factors)</p> <p>CHANGE_QUOTA_ROLL (Change plan element revenue class)</p> <p>CHANGE_QUOTA_UPLIFT_DATE (Change -plan element uplift factors date range)</p> <p>CHANGE_RC_HIER_DATE (Change revenue class hierarchy date range)</p> <p>CHANGE_RC_HIER_DELETE (Delete revenue class hierarchy effective interval)</p> <p>CHANGE_RC_HIER_PERIOD (Change revenue class hierarchy effective interval)</p> <p>CHANGE_RT_INS_DEL (Insert or delete rate tiers)</p> <p>CHANGE_RT_RATES (Change rate table rates)</p> <p>CHANGE_RT_TIERS (Change rate table tiers)</p> <p>CHANGE_SRP_HIER (Change salesperson hierarchy)</p> <p>CHANGE_SRP_HIER_DELETE (Delete salesperson hierarchy effective interval)</p> <p>CHANGE_SRP_HIER_PERIOD (Change salesperson hierarchy effective interval)</p> <p>CHANGE_SRP_PAY_GROUP (Change salesperson pay group)</p> <p>CHANGE_SRP_PAY_GROUP_DATE (Change salesperson's pay group date)</p> <p>CHANGE_SRP_QUOTA_CALC (Change salesperson's plan element setting)</p>

OIC 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_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)

OIC 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)

OIC 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)

OIC 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)

OIC 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)

OIC 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)

OIC 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)

OIC 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)

OIC 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)

OIC 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)

OIC 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)

OIC 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_GENERATE_STATUS	Plan Generation Status	FAILED (Failed) NOT_PUSHED (Not Activated) PUSHED (Activated)
PLAN_OBJECT_STATUS	Compensation Plan Object Status	COMPLETE (Complete) INCOMPLETE (Incomplete)
PLAN_STATE	Plan State	ACTIVE (Active) INACTIVE (Inactive) IN_PROGRESS (In Progress)
PLAN_TYPE_STATUS	Plan Type Status	ACCEPTED (Accepted) APPROVED (Approved) GENERATED (Generated) ISSUED (Distributed) LOCKED (Locked) PENDING (Pending) REJECTED (Rejected) SUBMITTED (Submitted)

OIC Lookup Type	Description	Lookup Code and Meaning
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)
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)

OIC Lookup Type	Description	Lookup Code and Meaning
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)
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)

OIC Lookup Type	Description	Lookup Code and Meaning
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)
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)

OIC Lookup Type	Description	Lookup Code and Meaning
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 User)
RETURN_STATUS	API Return Status	E (Error) S (Success) U (Unexpected Error) W (Warning)
REVENUE_TYPE	Transaction Credit Type	NONREVENUE (Nonrevenue) REVENUE (Revenue)
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)

OIC Lookup Type	Description	Lookup Code and Meaning
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)
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)

OIC Lookup Type	Description	Lookup Code and Meaning
SCENARIO_STATUS	Scenario Status	SET (Set) NOT_SET (Not Set)
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)

OIC 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)

OIC 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)

OIC 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)

OIC 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)

System Profile Options

C.1 System Profile Options

The table below lists the profile options which need to be set to implement Oracle Incentive Compensation after the product has been installed, but 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.

To set system profile options:

1. Log in to the Forms version of Oracle Incentive Compensation and choose the System Administrator responsibility.
2. Double-click Profiles.
3. Double-click System.
4. In the Find System Profiles window, check the check box next to one of the following, and then enter values or select from the List of Values:
 - *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.
 - *Profile*: Enter OSC% to see all Incentive Compensation profiles, or enter another more specific 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.

The following table contains information about Profile Options in Oracle Incentive Compensation, along with a description of each.

Guidelines

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.

In the table, the last four columns indicate the level where the profile option can be applied.

Name/Default	Description	Site	Application	Responsibility	User
OSC: Collect on Account Credits CN_COLLECT_ON_ACCT_CREDITS Default: No	The application collects only invoices and regular credit memos. If set to Yes, then the application will collect invoices, regular credit memos, and on account credit memos when running Oracle Receivable Collection.	Yes	Yes	Yes	Yes
OSC: Commission Rate Precision CN_COMM_RATE_PRECISION Default: Null	Determines the commission precision in a rate table. For example, 1.035 has a precision of 3.	Yes	Yes	Yes	Yes
OSC:Complete Calculation CN_COMPLETE_CALCULATION Default: Yes	Determines whether to run complete calculation or not.	Yes	Yes	Yes	Yes

Name/Default	Description	Site	Application	Responsibility	User
OSC: Currency Exchange Rate Date CN_SP_GL_RATE_DATE Default: System date	Enter date for reading the exchange rate in Oracle GL.	Yes	No	No	No
OSC: Customized Summarization CN_CUSTOM_AGGR_TRX Default Null	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.	Yes	Yes	Yes	Yes
OSC: Debug Mode CN_DEBUG Default: Yes	Determines whether debugging messages are written to the process log during execution of programs, whether concurrent or online. Setting Debug Mode to Yes writes these errors to an internal audit table.	Yes	Yes	Yes	Yes
OSC: Default Conversion Type CN_CONVERSION_TYPE Default: Null	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 form called Period Rates). (Toolbar > Financial > Currency Rates)	Yes	Yes	Yes	No
OSC: Default Custom Flag CN_CUSTOM_FLAG Default: Yes	When set to Yes, the compensation plans are customized. Otherwise, they are not customized.	Yes	Yes	Yes	Yes

Name/Default	Description	Site	Application	Responsibility	User
Display Draw Related Data in YTD Report CN_DISPLAY_DRAW Default: Null	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.	No	Yes	Yes	No
Enable Commission Statement Drilldowns CN_ENABLE_COMM_STMT_DRILLDOWN Default: Null	Enable Commission Statement drilldown.	Yes	Yes	Yes	Yes
OSC: Enable Hierarchy Edges T4 Trigger CN_HIERARCHY_EDGES_T4_ENABLE Default: Null	Set whether to execute a portion of cn_hierarchy_edges_t4 trigger or not.				
OSC: Import Server Side Data File Directory CN_IMP_SERVER_PATH Default: Null	The absolute path where the .csv files for server side transaction import are located.	Yes	Yes	Yes	Yes
OSC: Import Control File Directory CN_IMP_CONTROL_PATH Default: Null	This is the directory where the SQL Loader control file is stored. This profile should be set to absolute path for \$CN_TOP/bin.	Yes	Yes	Yes	Yes

Name/Default	Description	Site	Application	Responsibility	User
OSC: Income Planner Disclaimer CN_CUST_DISCLAIMER Default: No	Determines whether you use the customized disclaimer in the Pncome Planner.	Yes	Yes	Yes	Yes
OSC: Invoice Split Upgrade End Date CN_INVOICE_SPLIT_UPG_END_DATE Default: Null	The end date for the invoice split upgrade process.	Yes	Yes	Yes	Yes
OSC: Invoice Split Upgrade Start Date CN_INVOICE_SPLIT_UPG_START_DATE Default: Null	The start date for the invoice split upgrade process.	Yes	Yes	Yes	Yes
OSC: Log File CN_LOG_FILE Default: No	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.	Yes	Yes	Yes	Yes
OSC: Log File Directory CN_LOG_FILE_DIR Default: Null	Sets the directory where the log file will be stored. When you enter the directory path, you do not need to enter a slash after the name.	Yes	Yes	Yes	Yes

Name/Default	Description	Site	Application	Responsibility	User
OSC: LOV Input Validation CN_LOV_INPUT_LEN_PROFILE Default: Yes	LOV input validation	Yes	Yes	Yes	No
OSC: Mark Rules Change CN_MARK_CLS_RULES_CHANGE Default: Yes	Determines whether to mark event of classification rules change or not.	Yes	Yes	Yes	Yes
OSC: Mark Events CN_MARK_EVENTS Default: Yes	If you select Yes, every event, such as a transaction, is put into the Notify Log so that it can be included in the next calculation. Set it to No while setting up your system, but change to Yes when you are ready to start collecting transactions.	Yes	Yes	Yes	Yes
OSC: Multi Rollup Path CN_MULTI_ROLLUP_PATH Default: Null	Enables rollup of sales credits through multiple paths of the compensation group hierarchy. See <i>Guidelines</i> for restrictions on using this profile.	Yes	Yes	Yes	Yes
OSC: Negate during Revenue Adjustments Collection CN_RAM_NEGATE	Determines whether to negate during Revenue Adjustments Collection.	Yes	Yes	Yes	Yes
Pay by Transaction CN_PAY_BY_TRANSACTION Default: Null	Determines if application pays by transaction or not.	Yes	No	No	No

Name/Default	Description	Site	Application	Responsibility	User
OSC: Prior Adjustment CN_PRIOR_ADJUSTMENT Default: Yes	Allows prior adjustments. If set to No, allows all plan elements 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.	Yes	Yes	Yes	Yes
OSC: Report Security Level CN_REPORT_SECURITY_LEVEL Default: Salesrep	Report Security Level	Yes	No	Yes	Yes
OSC: Reset Error Transactions CN_RESET_ERROR_TRX Default: No	Reset Error Transactions	Yes	Yes	Yes	Yes
OSC: Roll Summarized Transactions CN_ROLL_SUM_TRX Default: Null	This profile option sets up the application to aggregate matching transactions.	Yes	Yes	Yes	Yes
OSC: Sleep Time in Seconds CN_SLEEP_TIME Default: 30 seconds	Sets the amount of wait time in between each phase of calculation. The wait 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.	Yes	Yes	Yes	Yes

Name/Default	Description	Site	Application	Responsibility	User
OSC: Salesforce Planning Debug Mode CN_SP_DEBUG Default: No	Determines whether input variables show on the window	Yes	No	No	No
OSC: Salesforce Planning FY CN_SP_PLANNING_FY Default: Null	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.	Yes	No	No	No
OSC: Scaling Factor CN_SCALING Default: No Scaling	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".	Yes	Yes	Yes	Yes
OSC: SQL Spool Path CN_SQL_SPOOL_PATH Default: /d07/app/applcsf/hm000a/out	Spool path for SQL scripts	Yes	Yes	Yes	Yes
OSC: Workflow Initial Wait Time in Hours CN_WF_INIT_WAIT_TIME Default: Null	Enter number of hours before the first reminder is issued.	Yes	Yes	Yes	Yes

Name/Default	Description	Site	Application	Responsibility	User
OSC: Workflow Reminder Frequency in Hours CN_WF_REMINDER_TIME Default: Null	Enter number of hours interval between each subsequent reminder.	Yes	Yes	Yes	Yes
OSC: SFP Responsibility Group CN_SFP_RESP_GROUP Default: Null	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.	No	No	Yes	No
OSC: Tracking Invoice Lines CN_TRACK_INVOICE Default: No	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.	Yes	Yes	Yes	Yes
OSC: Use Work Day Calendar CN_SFP_USE_WRKDAY Default: Null	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.	Yes	No	Yes	No
OSC: User's Employee Number CN_USER_EMP_NUM Default: Null	User's employee number	No	No	No	Yes

Name/Default	Description	Site	Application	Responsibility	User
OSC: User's Type CN_USER_TYPE Default: Null	User's Type	Yes	Yes	Yes	Yes
OSC: SFP Disable Workflow Notifications CN_SFP_DISABLE_WF Default: No	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.	Yes	No	Yes	No
OSO: Minimum Search String Length Default: 4	Used in Incentive Compensation to set the minimum number of characters required for any search from a text field.	Yes	No	No	No
OSO: Search Lead Wildcard Default: No	Indicates if % can be the first character in a search sent to a list of values	Yes	Yes	Yes	Yes
Bypass Group Validation ASF_BYPASS_GROUP_VALIDATION Default: No	Set to Y to bypass group usages when defining a resource and assigning that resource to a resource group.	Yes	Yes	Yes	No
Reset Balances Each Year CN_RESET_BALANCES_EACH_YEAR Default: No	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. Otherwise the balances carry over across fiscal years.	Yes	No	No	No

Name/Default	Description	Site	Application	Responsibility	User
AMS: Item Validation Master Organization AMS_ITEM_ ORGANIZATION _ID Default: Blank	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).	Yes	Yes	Yes	Yes

D.1 Moving from Forms to HTML Navigation

Oracle Incentive Compensation switched from Forms to an HTML user interface beginning with the 11.5.6 release. If you have upgraded from a release prior to 11.5.6, the following road map is provided to help you navigate in the newest release to perform the tasks you did in the previous Forms instance. The final Forms navigation and newest HTML navigation are shown.

Forms is still used for any procedures performed in Resource Manager.

The following tables contain five columns. The first two list the Navigation and Screen Name in the 11.5.5 release. The third column details the changes made in the 11.5.6 through 11.5.9 releases. Columns four and five list the Navigation and Screen Name in 11.5.9.

D.1.1 Financial

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar - Financial > Set of Books	Set of Books	No change. Still done in GL.	N/A	N/A
Menu bar > /Financial > Calendar	Accounting Calendar	No change. Still done in GL.	N/A	N/A
Menu bar > Financial > Period Types	Period Types	No change. Still done in GL.	N/A	N/A

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar > Financial > Open Close Periods	Open and Close Periods	New navigation flow.	Administration > Compensation > Financial > Open and Close Periods	Open and Close Periods
Menu bar > Financial > Define Currencies	Currencies	No change Still done in GL.	N/A	N/A
Menu bar > Financial > Define Currency Rates	Period Rates	No change. Still done in GL.	N/A	N/A
Menu bar > Financial > Interval Types	Interval Type	New navigation flow.	Administration > Incentive > Interval Types	Interval Types
Menu bar > Financial > Accumulation Periods	Accumulation Periods	New navigation flow.	Administration > Incentive > Accumulation Periods	Accumulation Periods
Menu bar > Financial > Pay Periods	Pay Periods	New navigation flow.	Administration > Incentive > Pay Periods	Pay Periods
Menu bar > Financial > Credit Types	Credit Types	New navigation flow.	Administration > Incentive > Credit Types	Credit Types
Menu bar > Financial > Credit Type Conversion	Credit Type Conversion Factor	New navigation flow.	Administration > Incentive > Credit Conversion	Conversion Factor

D.1.2 System

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar > System > System Parameters	System Parameters	New navigation flow. New HTML page fields related to integration with Oracle Payroll and Oracle Accounts Payable.	Administration > Incentive > Parameter	System Parameters
Menu bar > System > System Profiles	Find System Profile Values	No change	N/A	N/A

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar > System > System Profiles	System Profile Values	No change.	N/A	N/A
Menu bar > System > Security Profiles	Security Profile	No change.	N/A	N/A
Menu bar > System > Lookups	Oracle Sales Compensation Lookups	No change.	N/A	N/A
Menu bar > System > Tables and Columns	Tables (with Columns tab)	New navigation flow. Columns tab moved to separate HTML page called Columns.	Administration > Incentive > Tables	Tables
Menu bar > System > Tables and Columns	Tables (with Columns tab)	New navigation flow. Columns tab moved to Columns HTML page.	Administration > Incentive > Tables > Columns hyperlink > Columns in View drop-down	Columns
Menu bar > System > Tables and Columns	Tables (with Dimensions tab)	New navigation flow. Dimensions tab moved to Columns HTML page.	Administration > Incentive > Tables > Columns hyperlink > Dimensions in View drop-down	Columns
Menu bar > System > Tables and Columns	Tables (with Classification tab)	New navigation flow. Classification tab moved to Columns HTML page.	Administration > Incentive > Tables > Columns hyperlink > Classification in View drop-down	Columns
Menu bar > System > Tables and Columns	Tables (with Primary Key tab)	New navigation flow. Primary Key tab moved to Columns HTML page.	Administration > Incentive > Tables > Columns hyperlink > Primary Key in View drop-down	Columns
Menu bar > System > Collections	Collection and Mapping (Collection tab)	No change.	N/A	N/A
Menu bar > System > Collections	Collection and Mapping (Mapping tab)	No change.	N/A	N/A

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar > System > Collections	Collections	No change.	N/A	N/A
Menu Bar > System > External Tables	External Table	New navigation flow. Detailed list of external tables is on summary page called External Tables - Join Conditions.	Administration > Incentive > External Tables	External Tables - Join Conditions
Menu bar > System > Flexfields	Descriptive Flexfield Segments	No change.	N/A	N/A
Menu bar > System > Flexfields	Segments Summary New	No change.	N/A	N/A
Menu bar > System > Collection Parameters	Collections Runtime Parameters	New navigation flow.	Administration > Collection > Queries > Parameter area	Collection - Queries

D.1.3 Tasks

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar > Tasks > Import Resources	Selection Criterion	Combined with Advanced Search HTML page.	N/A	N/A
Menu bar > Tasks > Define Resources	Find Resources	New navigation flow. Page is in HTML style.	Quick Find > Resource > Advanced Search	Advanced Search
Menu bar > Tasks > Define Resources > Find button	Resource Search Results	New navigation flow. Page is in HTML style. HTML page shows only employees; Search for nonemployees is through existing form.	Resource > Resources > Resource Advanced Search > Enter name	Resources
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Roles tab)	No change, still in Forms.	N/A	N/A

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Groups tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Teams tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Service tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Interaction tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Compensation tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Receivables tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Miscellaneous tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Roles	Roles	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Groups	Define Groups (Members tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Groups	Define Groups (Roles tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Groups	Define Groups (Usages tab)	No change, still in Forms.	N/A	N/A

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar > Tasks > Define Groups	Define Groups (Parent Groups tab)	New navigation flow. Page is in HTML style.	Resource > Resources > Hierarchy	Group Detail - Child and Parent Groups
Menu bar > Tasks > Define Groups	Define Groups (Child Groups tab)	New navigation flow. Page is in HTML style.	Resource > Resources > Hierarchy	Group Detail - Child and Parent Groups
Menu bar > Tasks > Define Teams	Define Teams	No change, still in Forms.	N/A	N/A
Tasks > Adjustments	Maintain Transactions (Basic tab)	New navigation flow. Renamed field labels	Transaction > Adjustments > Search	Transaction Search
Tasks > Adjustments	Maintain Transactions (Advanced tab)	New navigation flow. Renamed field labels. Column display and sort selection.	Transaction > Adjustments > Personalize	Transaction Search
Tasks > Adjustments > New button or Adjust Transaction button	Adjust Transactions (Commission Lines tab)	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transaction Summary
Tasks > Adjustments > New button or Adjust Transaction button	Adjust Transactions (Transaction History tab)	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transaction Summary
Tasks > Adjustments > New button or Adjust Transaction button	Adjust Transactions (Customer Address tab)	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transaction Summary
Tasks > Adjustments > New button or Adjust Transaction button	Adjust Transactions (User Notes tab)	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transaction Summary
Tasks > Adjustments > Adjust Transaction button > Move Credits button	Maintain Transactions > Move Credits	New navigation flow. New action buttons. New UI.	Transaction > Adjustments > Move Credits	Transactions

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Tasks > Adjustments > Adjust Transaction button > Share Credits button	Maintain Transactions > Share Credits	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transaction Summary
Tasks > Adjustments > Adjust Transaction button > Deal Split button	Splits	New navigation flow. New action buttons. New UI.	Transaction > Adjust > Split	Transactions
Tasks > Adjustments > Adjust Transaction button > Deal Move button	Deal Move	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transaction Summary
Tasks > Submit Calculation	Calculation Submission	New navigation flow. New fields. Notify log and find resource on Calculations tab.	Transaction > Calculate > Create	Calculation Submission
Tasks > Process Log > Find Processes	Process Log	New navigation flow. One field only.	Transaction > Calculate > Details link in Process Log column	Process Log
Tasks > Concurrent Request Set	Multiple Request Set	Does not exist in HTML.	N/A	N/A
Tasks > Process Log	Find	New navigation flow.	Transaction > Calculate > Process Log or Transaction > Collect > View Log	Calculation Process Log or Process Log
Tasks > Posting Details	Posting Details	New navigation flow. New UI. New fields.	Transaction > Payment > Total	Payrun Details
HTML UI > Reports	Reports	New navigation flow. New reports, renamed report, no Adjustments Report.	Transaction > Report	Reports
Tasks > Rate Dimensions	Rate Dimensions	New navigation flow. Add Update and Restore buttons.	Incentive > Rate > Rate Table Details > Create	Rate Table Details - Dimensions

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Tasks > Run Concurrent Requests > Submit a New Request > Single Request	Single Request	New navigation flow. Exists in HTML Calculation, Loading, and Collection tabs.	Transaction > Calculate > Create or Transaction > Load or Transaction > Collect > Create	Calculation Submission or Load Transactions - View Request Status or Submit Request
Tasks > Run Concurrent Requests > Submit a New Request > Request Set	Request Set	New navigation flow. Exists in HTML Calculation, Loading, and Collection tabs.	Transaction > Calculate > Create or Transaction > Load or Transaction > Collect > Create	Calculation Submission or Load Transactions or Submit Request
Tasks > View Requests > Find Requests	Find Requests	New navigation flow. Exists in HTML pages under Search button.	All search buttons, for example Transaction > Collect > Search	Transaction Search
Tasks > User Notifications	Notify Log	Not replaced in HTML.	N/A	N/A

D.1.4 Salespeople

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
N/A	N/A	New navigation flow. New HTML page from Resource Manager. It has the ability to search for compensation groups based on certain search parameters.	Resource > Group > click Advanced Search hyperlink	Group Advanced Search

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Sales People icon > Navigator > View by Compensation Groups > select Compensation Group name	Compensation Groups	New navigation flow. The new HTML page lists all compensation groups satisfying your search criteria. List of Group members is found on the Group Detail screen	Resource > Group	Groups
N/A	N/A	New page from Resource Manager with more details on the group.	Resource > Groups > click Group Name hyperlink	Group Detail
Sales People icon > Navigator > View by Compensation Groups > select Compensation Group name > Admins button	Admin Details	No replacement.	N/A	N/A
Sales People icon > Navigator > View by Compensation Groups > select person's name.	Salespeople Workbench (Salesperson tab)	New navigation flow.	Resource > Resources > Pay Groups	Resource Detail, Assign Pay Groups
Sales People icon > Navigator > View by Compensation Groups > select person's name > Sales Role tab	Salespeople Workbench (Sales Role tab)	New navigation flow. For the list of the compensation groups which the selected person is assigned, see Details page, Group Membership area.	Resource > Resources > Resource Advanced Search > Enter name	Details: [resource name]
Sales People icon > Navigator > View by Compensation Groups > select person's name > Sales Role tab	Salespeople Workbench (Sales Role tab)	New navigation flow. Same page as above, but different area. For the list of the roles which the selected person is assigned, see Details page, Resource Role area.	Resource > Resources > Resource Advanced Search > Enter Name	Details: [resource name]

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Sales People icon > Navigator > View by Compensation Groups > select person's name > Compensation Plans tab	Salespeople Workbench (Compensation Plans tab)	New navigation flow. For the list of plan elements of the compensation plan, click a compensation plan name.	Resources > Resources > Compensation Plan	Resource Detail, Compensation Plans
Sales People icon > Navigator > View by Compensation Groups > select person's name > Compensation Plans tab	Salespeople Workbench (Compensation Plans tab)	HTML page contains list of plan elements of the selected compensation plan.	Resource > Resources > Compensation Plans > Compensation Plan name.	Resource Detail, Compensation Plan
Sales People icon > Navigator > View by Compensation Groups > select person's name > Compensation Plans tab > Compensation Summary button	Compensation Summary	New navigation flow. Enter period name, click Apply.	Resource > Resources > Compensation Summary	Resource Detail, Compensation Summary
Sales People icon > Navigator > View by Compensation Groups > select person's name > Compensation Plans tab > Compensation Summary button > Compensation Summary > View Details button	Compensation Detail	No replacement.	N/A	N/A
Sales People icon > Navigator > View by Compensation Groups > select person's name > Compensation Plans tab > Compensation Summary button > Compensation Summary > View Details button > Compensation Detail > View Performance button	Performance Summary	This information can be found in the Quota Performance Report.	Transaction > Report > Quota Performance	Quota Performance Report

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Sales People icon > Navigator > View by Compensation Groups > select person's name > Compensation Plans tab > Compensation Summary button > Compensation Summary > View Sales Credit button	Sales Credit	This information can be found in the Transaction Details Report.	Transaction > Report > Click Transaction Details Report hyperlink > Resource Search > Resource Search Results > Direct Resource Name	Transaction Details Report
Sales People icon > Navigator > View by Compensation Groups > select person's name > Payment Plans tab	Salespeople Workbench (Payment Plans tab)	New navigation flow.	Resource > Resources > Resource Advanced Search > Resources > Payment Plans	Resource Detail, Assign Payment Plans
Sales People icon > Navigator > View by Sales Roles > select a Role	Define Sales Roles	New navigation flow. Page is in HTML style. List of Roles assigned to each compensation plan is found on Compensation Plan Details, Roles page. List of people assigned to a specific Role is not available on HTML page.	Incentive > Plan > Sales Roles	Compensation Plan Details, Sales Roles
N/A	N/A	New HTML page from Resource Manager.	Resource > Resources	Resource Advanced Search
N/A	N/A	New HTML page from Resource Manager.	Resource > Resources > Advanced Search	Resources
N/A	N/A	New HTML page from Resource Manager	Resource > Resources > Advanced Search > Employees > Resource Name	Details: [resource name]
N/A	N/A	New HTML page from Resource Manager	Resource > Resources > Enter Name > Click Organization hyperlink	Organization

D.1.5 Compensation Plans

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Compensation Plans icon > View by Compensation Plans > select a compensation plan	Compensation Plans	New navigation flow. Details of a compensation plan are found on the Compensation Plan Details HTML page.	Incentive > Plan	Compensation Plan
Compensation Plans icon > View by Compensation Plans > select a compensation plan	Compensation Plans	New navigation flow.	Incentive > Plan > select a compensation plan name	Compensation Plan Details
Compensation Plans icon > View by Compensation Plans > select a compensation plan	Compensation Plans (Plan Elements tab)	New navigation flow.	Incentive > Plan > Plan Elements	Plan Details, Plan Elements
Compensation Plans icon > View by Compensation Plans > select a compensation plan > Salesperson Assign tab	Compensation Plans (Salesperson Assigns tab)	Side panel menu link added 11.5.8.	Incentive > Plan > Salespeople Assigned hyperlink	Plan Details - Resources Assigned
Compensation Plans icon > View by Compensation Plans > select a compensation plan > Sales Roles tab	Compensation Plans (Sales Roles tab)	New navigation flow.	Incentive > Plan > Sales Roles	Compensation Plan Details, Sales Roles
Compensation Plans icon > View by Plan Elements > select a plan element	Plan Element	New navigation flow.	Incentive > Element	Plan Elements
Compensation Plans icon > View by Plan Elements > select a plan element	Plan Element (General tab)	New navigation flow.	Incentive > Element > select a plan element name	Plan Element Details
Compensation Plans icon > View by Plan Elements > select a plan element > Distribute Variables button	Plan Element Distributions	New navigation flow.	Incentive > Element > Plan Element Details > Distribute button	Plan Element Details - Distribute Variables

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Compensation Plans icon > View by Plan Elements > select a plan element	Plan Element (Revenue Classes tab)	New navigation flow. For accelerators and transaction factors, see Plan Element Details, Accelerators page.	Incentive > Element > Plan Element Details > Revenue Classes	Plan Element Details - Revenue Classes
Compensation Plans icon > View by Plan Elements > select a plan element	Plan Element (Revenue Classes tab)	New navigation flow.	Incentive > Element > Plan Element Details, Revenue Classes > Details hyperlink in the Details column	Plan Element Details
Compensation Plans icon > View by Plan Elements > select a plan element	Plan Element (Rate Tables tab)	New navigation flow.	Incentive > Element > Plan Element Details, Rate Tables hyperlink	Rate Tables
Compensation Plans icon > View by Formula > select a formula	Formulas	New navigation flow.	Incentive > Formula	Formulas
Compensation Plans icon > View by Formula > select a formula > General tab	Formulas (General tab)	New navigation flow. Performance Measure expression now located on the Formula Details, Expressions HTML page.	Incentive > Formula > click hyperlink in Name column	Formula Details
Compensation Plans icon > View by Formula > select a formula > <i>Input</i> tab	Formulas (<i>Input</i> tab)	New navigation flow. Details of the expression are on the Calculation Expression Details HTML page.	Incentive > Formula > click hyperlink in Name column > Expression hyperlink	Expressions
Compensation Plans icon > View by Formula > select a formula > Rate Table tab	Formulas (Rate Table tab)	New navigation flow.	Incentive > Formula > click hyperlink in Name column > Rate Tables	Rate Tables
Compensation Plan icon > View by Formula > select a formula > <i>Output</i> tab	Formulas (<i>Output</i> tab)	New navigation flow. Details of the expression are on the Calculation Expression Details HTML page.	Incentive > Formulas > click hyperlink in Name column > Expression hyperlink	Expressions
Compensation Plan icon > View by Rate Tables	Rate Tables	New navigation flow. See Rate Table Details HTML pages.	Incentive > Rate	Rate Tables

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Compensation Plan icon > View by Rate Tables	Rate Tables	New navigation flow.	Incentive > Rate > select a Rate Table name	Rate Table Details
Compensation Plan icon > View by Rate Tables > select a rate table	Rate Tables	New navigation flow.	Incentive > Rate > Commission Rates	Rate Table Details-Commission Rates
N/A	N/A	New HTML page.	Incentive > Rate > Formulas	Rate Table Details, Formula Assignments
N/A	N/A	New HTML page.	Incentive > Rate > Plan Elements	Rate Table Details, Plan Element Assignments
Compensation Plan icon > View by Calculation Expressions	Calculation Expressions	New navigation flow.	Incentive > Expression	Calculation Expressions
Compensation Plan icon > View by Calculation Expressions > select an expression	Calculation Expressions	New navigation flow.	Incentive > Expression > select an expression name	Calculation Expressions

D.1.6 Payment Setup

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Payment Setup icon > View by Pay Groups > select a pay group	Pay Groups	New navigation flow.	Administration > Incentive > Pay Group	Pay Group
Payment Setup icon > View by Pay Groups > select a pay group	Pay Groups (Pay Periods and Salespeople tabs)	New navigation flow. Information on both tabs in Forms has been combined into one HTML page.	Administration > Incentive > Pay Group > Search for pay group, click Details	Pay Group Details

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Payment Setup icon > View by Payment Plan > select a payment plan	Payment Plan	New navigation flow. Edit details directly on the page.	Administration > Incentive > Payment Plan	Payment Plans

D.1.7 Classification Rules

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Classification Rules icon > Revenue Classes node > Revenue Class name	Revenue Classes	New navigation flow.	Administration > Incentive > Revenue Class	Revenue Classes
Classification Rules icon > Classification Rules node > right click > New	Ruleset	New navigation flow.	Administration > Incentive > Ruleset	Rulesets
N/A	N/A	New HTML page showing a list of rules and their details.	Administration > Incentive > Ruleset hyperlink > Rules hyperlink	Rules Hierarchy
Classification Rules icon > Classification Rules node > Ruleset name > Rules name	Rules (Rule Attribute tab)	New navigation flow.	Administration > Incentive > Ruleset > Rules Hierarchy > Attributes hyperlink	Rule Attributes
Classification Rules icon > Classification Rules node > Ruleset name > Rules name > Build Expression tab	Rules (Build Expression tab)	New navigation flow.	Administration > Incentive > Ruleset > Rules Hierarchy > Expressions hyperlink	Build Expression

D.1.8 Hierarchies

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Hierarchies icon > Hierarchies node > Customers	Hierarchies	New navigation flow. All hierarchies are listed on the summary HTML page called Hierarchy Types.	Administration > Incentive > Hierarchy	Hierarchy Types
Hierarchies icon > Hierarchies node > Customers > View Details	Hierarchies - Customers	New navigation flow.	Administration > Incentive > Hierarchy Types > Details hyperlink next to Customers	Hierarchies
Hierarchies icon > Hierarchies node > Revenue Classes	Hierarchies	New navigation flow. All hierarchies are listed on the summary HTML page called Hierarchies.	Administration > Incentive > Hierarchy Types > Details hyperlink next to Revenue Classes	Hierarchies
Hierarchies icon > Hierarchies node > Revenue Classes > View Details	Hierarchies - Revenue Classes	New navigation flow.	Administration > Incentive > Hierarchy Types > Details hyperlink next to Revenue Classes > Details hyperlink	Intervals
Hierarchies icon > Hierarchies node > Trx Types	Hierarchies	New navigation flow. All hierarchies are listed on the summary HTML page called Hierarchies.	Administration > Incentive > Hierarchy Types > Details hyperlink next to Trx Types	Hierarchies
Hierarchies icon > Hierarchies node > Trx Types > View Details	Hierarchies - Trx Types	New navigation flow.	Administration > Incentive > Hierarchy Types > Details hyperlink next to Trx Types > Details hyperlink	Intervals

D.1.9 Payment and Reports in HTML

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Payment > Setups	Pay Element Mapping	New navigation flow.	Administration > Incentive > Payroll	Pay Element Mapping
Payment > Summary	Payrun Search	New navigation flow.	Transaction > Payment	Payrun Summary
Payment > Summary	Payrun Summary	New navigation flow.	Transaction > Payment > Enter Payrun	Payments
Payment > Summary > select a total	Payrun Details	New navigation flow.	Transaction > Payment > Check Unassigned Resources and My Analysts check boxes > click Apply Search	Worksheet Summary
Payment > Summary > Payrun Details > select a total	Payment Transactions	New navigation flow.	Transaction > Payment > Payrun Details > select Total Worksheet Amount	Payment Transactions
Payment > Summary > Payrun Details > select Add a Payment Plan	Payment Plans	New navigation flow.	Transaction > Payment > Worksheet Summary > click Total Worksheet Amount hyperlink > click Add Payment Plan	Payment Plans
Payment > Create	Create Payrun	New navigation flow.	Transaction > Payment > Create Payrun	Create Payrun
Payment > Reports	Payment Reports	No longer available.	N/A	N/A
Payment > Reports > Commission Summary	Commission Summary Report	New navigation flow.	Transaction > Report > Commission Summary	Commission Summary Report
Payment > Reports > Payrun Signoff	Payrun Signoff Report	New navigation flow.	Transaction > Payment > Worksheet Summary > Payment Transactions > Signoff Report hyperlink	Payrun Sign-off Report
Reports > Compensation	Summary of Compensation Reports	New navigation flow.	Transaction > Report	Summary of Compensation Reports

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Reports > Compensation > Year To Date Summary > Salespeople Search Results > Salesperson Name	Year to Date Summary	New navigation flow.	Transaction > Report > Year to Date Summary	Year to Date Summary
Reports > Compensation > Transaction Details Report > Salespeople Search Results > Salesperson Name	Transaction Details Report	New navigation flow.	Transaction > Report > Transaction Details Report	Transaction Details Report
Reports > Compensation > Compensation Group Hierarchy Report > Salespeople Search Results > Salesperson Name	Compensation Group Hierarchy Report	New navigation flow.	Transaction > Report > Compensation Group Hierarchy Report	Compensation Group Hierarchy Report
Reports > Compensation > Classification Rules Search > Rules Found > Rule Name	Classification Rules Report	New navigation flow.	Transaction > Report > Classification Rules Report	Classification Rules Report
Reports > Compensation > Commission Summary Report	Commission Summary Report	New navigation flow.	Transaction > Report > Commission Summary Report	Commission Summary Report
Reports > Compensation > Quota Performance	Quota Performance Report	New navigation flow.	Transaction > Report > Quota Performance	Quota Performance Report
Reports > Compensation > Commission Statement Report > Salespeople Search Results > Salesperson Name	Commission Statement	New navigation flow.	Transaction > Report > Commission Statement	Commission Statement Report
Reports > Compensation > Unprocessed Transactions > Salespeople Search Results > Salesperson Name	Unprocessed Transactions	New navigation flow.	Transaction > Report > Unprocessed Transactions	Unprocessed Transactions

D.1.10 Salesforce Planning/Incentive Planning in HTML

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Salesforce	Resource Search	New navigation flow.	Resource > Planning	Resource Search
Salesforce	Resource Search Results	New navigation flow.	Resource > Planning	Resource Search Results
Salesforce	Resource Details - Main	New navigation flow.	Resource > Planning > Resource Search > Resource Search Results > Click Resource Name hyperlink	Resource Details - Main
Salesforce	Resource Details - Job Titles	The select field for Job Titles is on the Resource Details - Main page. Job Titles is in a separate, smaller browser window.	Resource > Planning > Job Titles list of values	Job Titles
Salesforce	Resource Details - On Target Earnings	On Target Earnings is a hyperlink in the Job Titles column of the Resource Details - Main page.	Resource > Planning > Resource Search > Resource Search Results > click Resource Name hyperlink > click amount in On Target Earnings column	Resource Details - On Target Earnings
Salesforce	Resource Details - Customized Anchors	Customized Anchors is a field in the Job Titles section of the main page.	Resource > Planning > On Target Earnings > Anchors hyperlink	Resource Details - Customized Anchors
Quota > Allocate	My Compensation Groups	New navigation flow.	Quota > Allocate > My Compensation Groups Search > My Compensation Groups	My Compensation Groups
Quota > Allocate	Quota Modeling Summary	New navigation flow.	Quota > Allocate > My Compensation Groups Search > My Compensation Groups > click hyperlink in Name column	Quota Allocation Details

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Quota > Allocate	Add To-be-hired	New navigation flow.	Quota > Allocate > My Compensation Groups Search > My Compensation Groups > click Name hyperlink > click Add Vacancy button	Add To-Be-Hired
Quota > Allocate	contract	New navigation flow.	Quota > Allocate > Allocate Contract	Allocate Contract
Quota > Allocate	Assign Quota	New navigation flow. New screen name.	Quota > Allocate > My Compensation Groups Search > My Compensation Groups > click value in Name column drilldown > Allocation Details	Allocation Details - Quota and Pay Assignment
Quota > Allocate	Quota from Field	New navigation flow. New screen name.	Quota > Allocate > My Compensation Groups Search > My Compensation Groups > click value in Name column drilldown > Quota Allocation Details > Final Prorated Quota hyperlink	Allocation Details - Quota and Pay Assignment
Quota > Allocate	Compensation Plan History	New navigation flow.	Quota > Allocate > My Compensation Groups Search > My Compensation Groups > Quota Allocation Details > click hyperlink in Plan Status column >	Compensation Plan History
Quota > Approve	Approve Contracts	New navigation flow.	Quota > Approve > Contract Approval	Contract Approval
Quota > Distribute	Distribute Contracts	New navigation flow.	Quota > Distribute > Resource Search > Resource Search Results > Click Resource Name hyperlink	Distribute Contract

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Quota > Activate	Activate Contracts	New navigation flow.	Quota > Activate > Resource Search > Resource Search Results > click Resource Name hyperlink	Compensation Plan Activate
Reports	Reports	New navigation flow.	Quota > Report	Reports
Reports	Resources Found	New navigation flow.	Quota > Report > Quota Model Summary (or any other report name) > Resource Search	Resource Search Results
Reports	Quota Modeling Summary	New navigation flow.	Quota > Report > Quota Model Summary > Resource Search > Resource Search Results > click hyperlink in Name column	Quota Modeling Summary
Reports	Average Quota Summary	New navigation flow.	Quota > Report > Average Quota Summary > Resource Search > Resource Search Results > click hyperlink in Name column	Average Quota Report
Reports	Overassign Quota Summary	New navigation flow. New report name.	Quota > Report > Overassign Quota Summary > Resource Search > Resource Search Results > click hyperlink in Name column	Quota Overassignment Report
Reports	Quota Range Summary	New navigation flow. New report name.	Quota > Report > Quota Range Summary > Resource Search > Resource Search Results > click hyperlink in Name column	Quota Range Report
Reports	Compensation Contract Status	New navigation flow.	Quota > Report > Compensation Contract Status > Resource Search > Resource Search Results > click hyperlink in Name column	Compensation Contract Status

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Reports	Overlay Summary	New navigation flow. New report name.	Quota > Report > Overlay Summary > Resource Search > Resource Search Results > click hyperlink in Name column	Overlay Report
Reports	To-be-hired Summary	New navigation flow. New report name.	Quota > Report > Vacancy Summary > Resource Search > Resource Search Results > click hyperlink in Name column	Vacancy Report
Reports	Transitional Salespeople Summary	New navigation flow. New report name.	Quota > Report > Transitional Salespeople > Resource Search > Resource Search Results > click hyperlink in Name column	Transition Report
Reports	Plan Status	New navigation flow. New report name.	Quota > Report > Plan Status > Resource Search > Resource Search Results > click hyperlink in Name column	Plan Activation Status Report
Reports	Role to Compensation Plan Mapping	New navigation flow. New report name.	Quota > Report > Role to Compensation Plan Mapping > Enter Role Name or Plan Name > click Apply	Role to Compensation Plan Mapping Report
Setup > Sales Roles	Sales Role Summary	New navigation flow. New screen name.	Incentive > Agreement	Agreements
Setup > Sales Roles > select a role	Sales Role Detail	New navigation flow. New screen name.	Incentive > Agreement > Enter Name > Click Apply > Click Name hyperlink	Sales Role Detail
Setup > Sales Roles > Sales Role Detail > role name hyperlink	Configure Contract Text	New navigation flow. New screen name.	Incentive > Agreement > Sales Role Detail > Role Name hyperlink	Agreement Details - Contract Text

11.5.5			11.5.9	
Navigation	Screen Name	Changes	Navigation	Screen Name
Setup > Sales Roles > Sales Role Detail > edit formula hyperlink	Edit Computed Component Formula	New navigation flow. New screen name.	Incentive > Agreement > Sales Role Detail > click Edit Formula hyperlink	Agreement Details - Computed Component Formula
Setup > Sales Roles > Sales Role Detail > define anchors hyperlink	Define Quota Anchors	New navigation flow. New screen name.	Incentive > Agreement > Sales Role Detail > click Anchors hyperlink in Details column	Agreement Details: Variable Pay, Computed Components, Rates
Setup > Components	Components	New navigation flow. New screen name.	Administration > Incentive > Component	Quota Components
Setup > Attainment	Attainment Schedules	New navigation flow. New screen name.	Administration > Incentive > Attainment	Attainment Schedule Summary
Setup > Job Titles	Job Titles	New navigation flow.	Administration > Incentive > Job Titles > click Job Title hyperlink	Resource Detail - Job Titles
Setup > User Access	User Access	New navigation flow.	Administration > Incentive > User Access	User Summary
Setup > User Access > select a name	User Access Details	New navigation flow.	Administration > Incentive > User Access > click value in Name column drilldown	User Access Detail
Setup > Plan Text	Plan Text	New navigation flow. New screen name. New field enables you to select a transaction calendar.	Administration > Incentive > Settings	Settings
Setup > Activate Roles	Role Activation	New navigation flow.	Incentive > Activation	Role Activation

Responsibilities

E.1 Responsibilities in Oracle Incentive Compensation

In Oracle Incentive Compensation, people are assigned different responsibilities to allow them appropriate access to the application. In the table below, the responsibilities in this release are listed on the left, with responsibilities for release 11.5.5 listed to the right. Release 11.5.5 was the last one to use Forms. One responsibility, Incentive Compensation Developer, remains in Forms. It is used only for making changes to lookups and profile options, and for submitting requests.

Be sure when setting up a resource who is an analyst to not assign him or her a salesperson number. If you assign a salesperson number to an analyst, the application treats that analyst as if he or she were a salesperson, therefore, the view of reports is limited to those set up for the salesforce: Hierarchy Summary, Year to Date Summary, Commission Statement, and Quota Performance.

OIC 11.5.9 (HTML)	OIC 11.5.5 (Forms and HTML)
Incentive Compensation Super User	Sales Compensation Super User (Forms)
Incentive Compensation Payment	Sales Compensation Online Super User (HTML)
Incentive Compensation Reports	Sales Compensation Online Analyst (HTML)
Incentive Planning Analyst	Salesforce Planning Super User
Incentive Planning Contract Approver	Salesforce Planning Contract Approver
Incentive Planning Finance Manager	Salesforce Planning Finance Manager
Incentive Planning Sales Manager	Salesforce Planning Sales Manager
Incentive Compensation Analyst	Sales Compensation Analyst
Incentive Compensation Developer (Forms)	NA

E.1.1 Tab Usage in Oracle Incentive Compensation 11.5.9

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.

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				Yes			
	Activation	Yes				Yes			
	Plan	Yes	Yes			Yes			
	Element	Yes	Yes			Yes			
	Formula	Yes	Yes			Yes			
	Rate	Yes	Yes			Yes			
	Expression	Yes	Yes			Yes			
Modeling	Agreement	Yes				Yes			
	Comparison	Yes				Yes			
	Performance	Yes				Yes			
Resource	Planning	Yes				Yes	Yes	Yes	Yes
	Resources	Yes	Yes			Yes	Yes	Yes	Yes
	Role	Yes	Yes			Yes			
	Group	Yes	Yes			Yes	Yes	Yes	Yes
Quota	Allocate	Yes				Yes		Yes	Yes
	Approve	Yes				Yes	Yes		

Tab Name	Subtab Name	IC Super User	IC Analyst	IC Payment	IC Reports	IP Analyst	IP Contract Approver	IP Finance Manager	IP Sales Manager
	Distribute	Yes				Yes			
	Activate	Yes				Yes			
	Report	Yes				Yes	Yes	Yes*	Yes**
Transaction	Collect	Yes	Yes						
	Import/Export	Yes	Yes						
	Adjust	Yes	Yes						
	Load	Yes	Yes						
	Calculate	Yes	Yes						
	Notification Log	Yes	Yes						
	Payment	Yes	Yes						
	Report	Yes	Yes						
Requests	Collection	Yes	Yes						
	Transaction	Yes	Yes						
	Calculation	Yes	Yes						
	Payment	Yes	Yes						
Product	All	Yes	Yes			Yes	Yes	Yes	Yes
Administration	All	Yes	Yes			Yes			
Payment	NA			Yes					
Reports	NA			Yes	Yes				

* 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.

Glossary

These are the terms most commonly used in Oracle Incentive Compensation.

Accelerators

Types of incentives that vary compensation. Payment accelerators are a multiplier on the compensation rate without affecting the quota. Quota accelerators work on sales credit, sometimes changing compensation amounts by moving calculation to a different tier in a rate table

Accumulation Period

The time interval during for which commissions are collected. For example, a resource can have an accumulation period of a month and a pay period of semimonthly.

Agreement

An agreement is an early stage of a compensation plan used in the planning area of Oracle Incentive Compensation. In the Modeling tab, incentive planners experiment with creating an agreement and assigning it to a role before defining details and associating a resource with a role in the Quota tab.

Anchor

When defining a sales role, use anchors to indicate the maximum that can be earned at each tier of a rate table.

Application Programmable Interface (API)

A set of procedures to import or export information to and from Oracle Incentive Compensation.

Attainment Schedule

Attainment schedules enable planners to pay different levels of compensation depending on the percentage of attainment of a set sales goal. Attainment schedules are used in the Compensation Contract where earnings for each level of achievement are displayed.

Bonus

Incentive compensation typically paid for meeting a goal, including quantitative and qualitative goals.

Classification Rules

User defined categories used to classify sales transactions. The classified transactions are part of a classification ruleset. Classification rules vary greatly from one company to another, depending on the product or service provided and the different ways that resources are compensated.

Classification Ruleset

A group of classification rules assigned to a specific time period or location that sorts transactions into preset categories, so that they can be compared to revenue classes in a resource's compensation plan. Only one classification ruleset can be active at a time.

Clawback

See Takeback.

Collection

The process of collecting transactions from feeder systems into Oracle Incentive Compensation.

Compensation Group

A group of resources who share sales credit, directly or indirectly, when a sale is made. They are placed together in a *compensation group hierarchy* to accurately account for the payment of commission and sales credit. For example, at one company, when resources close a sale, they receive commission, their managers receive sales credit toward their quotas, territory sales managers receive sales credit from the manager's transactions, and territory sales consultants also receive indirect credit for performing consulting work that helped to close the business.

Compensation Plan

A collection of one or more modular plan elements used to calculate a compensation payment. One compensation plan is assigned to a sales role, which is then assigned to a resource. Some parts of a compensation plan can be customized for individual resources, such as a payment plan or pay group.

Concurrent Program

Concurrent programs run at the same time as other Oracle Incentive Compensation functions. For example, you can run a concurrent program to collect transactions from a transaction source while you are building compensation plans.

Credit Memo

A document generated when an invoice is fully or partially reversed. Credit memos are later collected and applied against transactions.

Dimension

Rate dimensions define the tiers that a rate table uses to apply rates. A dimension contains rate tiers to establish different levels of achievement to be compensated at different rates.

Direct Sales Credit

Sales credit directly assigned to a resource in a transaction in a feeder system, such as Order Capture or Order Management, or another non Oracle legacy system.

Formula

A set of instructions that determines how compensation will be calculated. Formulas are built from input expressions, output expressions, and rate tables.

Indirect Sales Credit

Credit inherited by a resource according to his or her place in the resource hierarchy. Indirect credit can roll up from a subordinate to a manager.

Interval

Intervals are time periods during which a compensation or a plan element is effective. Plan element intervals must be contained within the effective interval of a compensation plan.

Interval Type

The time period of the interval, for example, month, quarter, or year.

Job Title

Job titles are used by Human Resources to categorize employees. Oracle Incentive Compensation uses Roles, and a Job Title can be assigned to a particular Role by using the Job Titles page.

Manual Transaction

A user-entered transaction created for reversing or changing sales credit.

Mapping

Rules defining collection that connect the table columns of a feeder system to the transaction columns in Oracle Incentive Compensation.

Notification Log

The Notification log automatically records every change in the system that affects calculation and lists what part of the calculation must be rerun as a result of an event.

Pay Group

An assignment that determines the frequency with which a resource receives payment. A resource cannot belong to more than one pay group at a time.

Payment

There are three types of payment:

- Regular Payment: The application collects data, prepares it, and formats it to be used by a non-Oracle Payable system.
- Accounts Payable Integration: Used for vendors, this method prepares payment for Oracle Accounts Payable by classifying the resources as suppliers.
- Payroll Download File: The application collects data and creates a file that can be used by Oracle Payroll

Payment Plan

An arrangement in affect for some resources 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 recovery can be on a separate schedule from the pay period.

Performance Measure

An accumulation of transaction values that is captured by a Plan Element and grouped for use in reports that compare achievements to Quota, Goal and Performance Measure. Performance measures are not used to calculate commission.

Plan Element

Parts of a compensation plan that may reflect variations of commission or perhaps a bonus based on the accumulated achievement of the resource. Plan elements can also be configured for tracking nonmonetary credits such as managerial points or production credits. Plan elements consist of modular components that can be freely assigned in different combinations, including revenue classes, formulas, and rate tables.

Push

Push is a way of referring to the movement of an approved and accepted compensation plan from the planning area into the administrative area of Oracle Incentive Compensation.

Rate Table

Part of a formula, along with input and output expressions, that determines the amount of compensation based on amount or percentage of achievement compared to quota.

Regoaling

A functionality that enables managers to change the quota or variable pay of a resource's compensation plan at any time. These changes could be required because of a change in business circumstances, a resource is receiving too much or too little commission, or if a resource receives a promotion to a new role with a new goal. Regoaling can only be used if a plan is already accepted and activated.

Revenue Class

A user-defined category of business revenue used to classify a transaction for compensation and calculation. Revenue classes are assigned to plan elements and help Oracle Incentive Compensation determine whether classified sales credit is applied toward a compensation payment.

Revenue Class Rules

One or more conditions a revenue class must meet to classify into a given revenue class.

Revenue Class Hierarchy

An arrangement of revenue classes and subclasses in which the broadest classes are at the top of the structure. Classified transactions are

Role

A role describes a set of resources who share a common compensation structure. Examples are Salesperson, Consultant, and Regional Sales Manager. In Oracle Incentive Compensation, you assign each individual resource to a predetermined role, which can be customized in some ways. Changes to a role affect everyone assigned to that role who does not have the "Customized" check box checked on the compensation plan. A resource can have more than one role at the same time.

Ruleset Types

Rulesets are of two types, Revenue Classification and Account Generation.

- 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.

Sales Credit

An amount of revenue or nonrevenue credit that is awarded to a resource.

Seasonality

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.

Takeback

The amount of compensation credited for a sale that Oracle Incentive Compensation takes back when the invoice due date grace period is exceeded. If the invoice is subsequently paid, then a giveback can be used to restore credit to a resource. Takebacks are sometimes called clawbacks.

Transaction Calendar (Workday Calendar)

A calendar that can be defined to contain only workdays and exclude weekends and holidays. The workday calendar is a type of transaction calendar. A calendar's

duration can be defined to match the organization's financial year. A new workday calendar can be assigned every year as the dates of holidays and weekends will differ.

Transaction Factor

A multiplier on sales credit that determines net sales credit given for each type of transaction.

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