

Oracle® Incentive Compensation

Implementation Guide

Release 11*i*

Part No. B12226-01

March 2004

Oracle Incentive Compensation Implementation Guide, Release 11i

Part No. B12226-01

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Oracle 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.

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Preface

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

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

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

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

- Oracle Self-Service Web Applications.

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

- The Oracle Applications graphical user interface.

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

See [Other Information Sources](#) for more information about Oracle Applications product information.

How To Use This Guide

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

- [Chapter 1](#) gives an overview of Oracle Incentive Compensation, lists new and obsolete features in this release, and discusses navigation of the HTML user interface.
- [Chapter 2](#) lists mandatory dependencies, integrations with other Oracle products, and verification of setups for dependencies.
- [Chapter 3](#) presents an overview and a task sequence of the implementation steps in table format.
- [Chapter 4](#) comprises the main body of the document, with the implementation steps detailed step by step.
- [Appendix A](#) contains a detailed listing of flexfields used in Oracle Incentive Compensation.
- [Appendix B](#) presents the lookups used in Oracle Incentive Compensation, updated for this latest release of the product.
- [Appendix C](#) details the profile options used in this release of Oracle Incentive Compensation.
- [Appendix D](#) presents a useful road map that compares the navigation in earlier releases 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.
- [Appendix F](#) gives examples of code for external formulas.
- [Appendix G](#) contains examples of customized code for summarized transactions.
- The Index makes it easy for users to find specific information.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our

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

Accessibility of Code Examples in Documentation

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

Other Information Sources

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

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

Online Documentation

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

- **PDF Documentation**- See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on *OracleMetaLink* and is updated frequently.
- **Online Help** - You can refer to Oracle iHelp for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **11i Release Content Document** - Refer to the Release Content Document for new features listed release. The Release Content Document is available on *OracleMetaLink*.
- **About document** - Refer to the About document for patches that you have installed to learn about new documentation or documentation patches that you can download. The new About document is available on *OracleMetaLink*.

Related Guides

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

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

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

Guides Related to All Products

Oracle Applications User's Guide

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

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

Guides Related to This Product

Oracle Incentive Compensation User Guide

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

Oracle Incentive Compensation Technical Reference Manual

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

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

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

Oracle Applications Implementation Wizard User Guide

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

Upgrading Oracle Applications

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

“About” Document

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

Maintaining Oracle Applications

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

Oracle Applications System Administrator’s Guide

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

Oracle Alert User’s Guide

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

Oracle Applications Developer’s Guide

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

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Applications Product Update Notes

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

Oracle Workflow Administrator's Guide

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

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle Workflow API Reference

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

Oracle Applications Flexfields Guide

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

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

Oracle eTechnical Reference Manuals

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

Oracle Applications Message Manual

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

Training and Support

Training

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

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

Support

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

OracleMetaLink

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

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

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

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

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

Introduction

This chapter provides information on the following topics:

- [Section 1.1, "Oracle Incentive Compensation Overview"](#)
- [Section 1.2, "New in This Release"](#)
- [Section 1.3, "Obsolete in this Release"](#)
- [Section 1.4, "Migration Issues"](#)
- [Section 1.5, "Navigation"](#)

1.1 Oracle Incentive Compensation Overview

Using Oracle Incentive Compensation, you can align your business's unique corporate objectives to sales force activities, automate the complex task of calculating variable compensation, and ensure timely and accurate payments.

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 Field Sales, after which you can approve the plans in Oracle Incentive Compensation.

1.2 New in This Release

This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.10 release. If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult OracleMetaLink for relevant product patches and documentation.

The following new features have been added to this release of Oracle Incentive Compensation.

1.2.1 Sales Credit Allocation

This new feature is an automated process that accurately determines who should receive credit and how much credit should be given to each credit receiver. Credit allocation can be applied at different times within the sales cycle, for example, opportunities, quotes, orders, and invoices.

The main steps in the process are:

1. Define credit allocation rules and split percentages
2. Use credit allocation rules to determine credit split percentages
3. Apply allocation percentages to transactions

Sales Credit Allocation uses Oracle Territory Manager to identify resources who should receive credit.

See [Section 4.46, "Sales Credit Allocation Setup"](#) for details.

1.2.2 Compensation Plan Enhancements

Summarized View of Compensation Plan Components

This release features a new single-page view of a compensation plan, with drill-down navigation to specific details.

Sparse Implementation of Rate Tables in Plan Elements

In this release of Oracle Incentive Compensation, sparse implementation of rate tables allows large rate tables to be stored without using a lot of space. Especially in multidimensional rate tables, which can have a large number of rate tier combinations, sparse implementation stores only the combinations whose rates are not zero. When changes are made to the rate table, only the stored tiers have to be changed. This feature enhances performance while requiring no action by the user.

User Defined Functions in Calculation Expressions

User defined functions give you more freedom in building a calculation expression. In this release, you can add functions to an expression that are not available in the expressions builder on the Create Expressions page. After you create a function in SQL Plus in the APPS schema, can select it from the list of values in the Function field on the Create Expression page.

1.2.3 Payment Enhancements

Improved User Interface for Payrun Information

A new Payruns page replaces the previous Payrun Summary. It displays listed payrun information when it opens with no additional keystrokes. A new, expanded Payrun Summary page incorporates bins that display worksheet status, Top Worksheets, Top Transactions, and Terminated Resources. A separate area shows worksheet statuses in a graphical manner. The page headers now include payrun and role information and display navigation paths.

Improved User Interface for Payment Worksheet Information

A new Worksheets page replaces the previous Worksheet Summary. The search parameters can be personalized. You can drill down to a new Worksheet page, which replaces the Payment Summary. Both worksheet pages display navigation paths and use payrun and role information in page headers.

Mass Assignment of Payment Plans by Role

In this release, you can assign payment plans at the role level, so that all of the resources to whom the role is assigned receive the same payment plan. Previously, you could only assign payment plans at the resource level. You can still assign and modify payment plans for individual resources in situations where individual assignment makes more sense for your business.

You can lock a payment plan at the resource level to prevent it being deleted when changes are made to the role to which it is assigned.

Mass Assignment of Pay Groups by Role

In the same way as payment plans can now be mass assigned, you can now assign a pay group to a role. Every resource that has that role assigned receives the pay group assignment, but you can lock the individual resource's pay group to prevent the mass assignment to preserve the previous assignment for that resource.

You can still assign a pay group to an individual resource at the resource level.

1.2.4 Reporting Enhancements

Managers View Direct Reports' Compensation Information

In this release, managers can view compensation information for any resources that report directly to them. Managers can access the Year to Date Summary, Quota

Performance Report, Commission Statement, and Earnings Statement Report for their resources based on one of four hierarchies:

- Sales and Telesales
- Sales Compensation
- Sales Force Planning
- Compensation Reporting Hierarchy

The Compensation Reporting Hierarchy is a new hierarchy type introduced in this release.

Default Reporting Hierarchy

You can now select a default reporting hierarchy at the application level using a new system profile, OSC: Default Reporting Hierarchy. The system profile gives you the choice of the four hierarchies shown above from JTF_RS_USAGE. See [Appendix C, "System Profile Options"](#).

You can customize the default reporting hierarchy by responsibility. If the OIC: Default Reporting Hierarchy is set at the responsibility level, it takes precedence over the application level setting.

New Commission Statement Report

A new Commission Statement Report in this release is designed to be easily understood by resources. It includes a Balance Summary that shows balances, earnings, recoverable and nonrecoverable amounts, payment due and ending balance. In the Commission Summary section a resource can select details for commission, bonus, or payment adjustments. This section also includes a graph.

The Commission Statement from the previous release remains, but is renamed the Earnings Statement Report.

You can view the Commission Statement Report on the Commission Statement subtab of the Transaction tab in Oracle Incentive Compensation and on the Compensation tab in Oracle Field Sales. You can access the Compensation tab using Oracle Incentive Compensation with the Sales Force User responsibility.

Two New Discoverer Workbooks

Two new Discoverer workbooks are included in this release:

- Contract Status: Allows you to track the progress of compensation plan assignments.

- **Transaction Status:** Allows you to view transactional data for a resource by transaction status.

1.2.5 Incentive Planning Enhancements

In this release, the incentive planning process is streamlined by allowing the importing and exporting of data to and from spreadsheets. This enables compensation planners to download sales force agreements and personalize them quickly offline and then upload them into the application. The compensation planners can also generate, submit, and unlock agreements in bulk.

Contract approvers can download agreements to spreadsheets and validate, approve or reject the agreements offline. Then, they can upload the modified spreadsheet into the application.

1.2.6 Consolidation of Subtabs in Incentive and Quota Tabs

In this release, the Incentive and Quota tabs have consolidated subtabs. This has been done to streamline the processes performed on those tabs.

On the Incentive tab, the Agreement and Activation functions are consolidated into the Agreement subtab. The new Agreements page incorporates three columns from the old Activation page: Activation Status, Activate (containing a box), and Reason for Failure.

On the Quota tab, the Approve, Distribute, and Activate functions from the previous release have been merged into the new Process subtab, which opens the Compensation Plan Processing page. The Distribute, Activate, and Approve/Reject functions are now performed using the Action column on that page.

1.2.7 Projected Compensation

Projected Commission Detail API

This release introduces a new integration with Oracle Quoting that enables users of Oracle Quoting to pass parameters into Oracle Incentive Compensation and receive projected compensation information on quotes. This can have a positive impact on quota attainment by giving the sales force a more accurate projection of possible earnings and management a tool to influence salesperson behavior. See [Section 2.2.6, "Oracle Quoting or Third Party Quoting Application"](#) for more information.

1.2.8 Sales Compensation Payment Analyst Role Type

The Sales Compensation Payment Analyst is a new role type in this release. Use it whenever you define an analyst in Resource Manager for use in Oracle Incentive Compensation.

See [Section 4.21.1, "Sales Compensation Payment Analyst Role Type"](#) for details.

1.3 Obsolete in this Release

The Product tab is no longer displayed as a default tab in Oracle Incentive Compensation. In connection with Oracle Marketing Online, this tab is used to work with products and price lists.

The Product tab can be displayed for responsibilities that you wish to see it. This is done by adding it to the menu set up that is used by those responsibilities. If multiple responsibilities shares the menu, and you don't want certain responsibilities to have access to the Product tab, you can exclude it for those responsibilities.

To display the Product tab, perform the following procedure.

Responsibility

System Administrator

Login

Log in to Oracle Forms.

Navigation

Application > Menu

Steps

1. Add the Product tab to the menu.
You can set the tab order by changing the sequencing of the tabs.
2. Save.
3. Return to the Navigator and select Security > Responsibility > Define.
4. Query for Incentive Compensation responsibilities.

5. Add the Product tab as a menu exclusion for any responsibility that you want to prevent from viewing the tab.
6. Save.

1.4 Migration Issues

This section contains information that is useful if you are upgrading from an earlier release of Oracle Incentive Compensation. The first item applies only to the 11.5.10 release, and the sections following apply to upgrades to 11.5.8+.

1.4.1 Migrating to Release 11.5.10

Using the New Commission Statement for Migrated Payrun Data

In release 11.5.10, the new Commission Statement displays summarized and detailed information for payment worksheets created in 11.5.10. However, it cannot display that information for payment worksheets created in previous releases. Previous releases did not collect certain information, such as Manual Payment Adjustments of individual payment transactions, which are part of the new report.

The previous Commission Statement, now called the Earnings Statement, does display the data. This is the recommended way to view payrun data created in previous releases. If you run the new Commission Statement using payment information that was created in a release of Oracle Incentive Compensation prior to 11.5.10, this message displays:

Warning - Please use the Earnings Statement. This payrun was migrated from a previous application version. Certain details of payment are not available from the previous version except for the Balance Summary.

1.4.2 Migrating to Release 11.5.8 or Higher

The following five sections relate to customers upgrading from releases 11.5.5 or 11.5.7 to 11.5.8 or higher.

Refresh Unpaid Worksheets Created before 11.5.8

Starting in Oracle Incentive Compensation release 11.5.8, a new feature enabled access to a Sign-Off Report to view PTD/YTD earnings, credits and targets when the worksheet was created. This information does not exist for worksheets created before release 11.5.8, so the Sign-Off Report link is disabled for those worksheets.

Unpaid worksheets from releases prior to 11.5.8 must be refreshed after they are migrated to 11.5.10 to display the Sign-Off Report link.

Pay Group Period Types Now Match System Parameters Settings

In releases of Oracle Incentive Compensation prior to 11.5.10, you could select the period for a pay group using a drop-down list in the application. Starting with 11.5.10, all pay groups have their period set to match the setting in System Parameters. This means that any pay group data that is migrated to 11.5.10 automatically is assigned the period setting from System Parameters. Also, the Period drop-down list on the Pay Groups page is no longer used in the application; the period is displayed as read-only text.

Current Earnings Due Feature Unavailable for Older Worksheets

The Current Earnings Due feature was introduced in release 11.5.8 of Oracle Incentive Compensation. This view-only page shows the total payment amount and all of the earnings made to determine the calculated earnings. However, it cannot display this information for worksheets created before 11.5.8.

For pre-11.5.8 worksheets, the current earnings due amount is set to 0.00 and the link to the page is disabled. You can refresh any migrated unpaid worksheets to see the current earnings due amount. However, because you cannot refresh migrated paid worksheets, you cannot see the current earnings due amount for those worksheets.

Hold Payment Transactions During Upgrade

If you are upgrading from Oracle Incentive Compensation 11.5.5 to 11.5.8 or higher, you must release any held transactions prior to upgrade. Any held amounts that are migrated will display incorrectly as a 0.00 balance in the payment worksheet.

You can run the following SQL queries to determine whether there are any payment transactions in Hold status prior to upgrade. If the queries do not return zero records, release the hold and pay the amounts prior to upgrade.

Query 1

```
sql> select count (1)
      from cn_posting_details_sum_all
      where hold_flag = 'Y' and paid_flag = "N"
```

Query 2

```
sql> select count (1)
      from cn_posting_details_all
      where hold_flag = 'Y' and paid_flag = "N"
```

Values in List of Values may Change After Migration

After migration, lookup values in lists of values may no longer be available if changes were made to the valueset list of values or its underlying table. Table lookup values are stored in Oracle Incentive Compensation, but if changes were made to a valueset from another product that is used by Oracle Incentive Compensation, such as Oracle Receivables (AR), it cannot be changed within Oracle Incentive Compensation itself.

1.5 Navigation

1.5.1 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.

In this release, the Incentive and Quota tabs have consolidated subtabs to streamline the processes performed there. On the Incentive tab, the Agreement and Activation subtabs are merged into the Agreement subtab. On the Quota tab, the Approve, Distribute, and Activate subtabs from the previous release have been merged into the new Processing subtab.

This release introduces several new subtabs, to accommodate new or expanded functionality. These new subtabs include:

- Credit Rules ([The Incentive Tab](#))
- Import ([The Quota Tab](#))
- Commission Statement ([The Transaction Tab](#))

- Allocation Transfer ([The Requests Tab](#))
- Allocation Process ([The Requests Tab](#))

In addition, the Incentive subtab of the Administration tab includes a side panel menu link called Source Table Mapping, which is used in Sales Credit Allocation.

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 releases 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.

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 list and an Advanced Search link.

Some fields in the application use a percent sign (%) wildcard to display all listings for that field as a default when you click Apply. Some pages contain lists of values that you can use to search for data. These lists of values use either a Go button or search icon (flashlight), and display a pop-up box when you initiate a search. When entering values into these fields, the default setting is a four character minimum, including wildcards. The default setting can be changed by the System Administrator by setting the *OSO: Minimum search string length* profile option (see

[Appendix C, "System Profile Options"](#) for details). The System Administrator can also use the *OSO: Search Lead Wildcard* profile option to set whether an initial wildcard (%) can be used in these fields.

Numbers that are entered into Oracle Incentive Compensation should be within the limit that is permitted for the database version used with the application. For example, with the 8i version of the database, Oracle stores numeric data in variable-length format. Each value is stored in scientific notation, with one byte used to store the exponent and up to 20 bytes to store the mantissa. The resulting value is limited to 38 digits of precision. For example, the number 412 is stored in a format similar to 4.12×10^2 , with one byte used to store the exponent (2) and two bytes used to store the three significant digits of the mantissa (4, 1, 2). Negative numbers include the sign in their length. Taking this into account, the column size in bytes for a particular numeric data value NUMBER (p), where p is the precision of a given value, can be calculated using the following formula:

$$\text{ROUND}((\text{length}(p)+s)/2)+1$$

where s equals zero if the number is positive and s equals 1 if the number is negative.

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

In this release, functions that previously used a set of buttons have been grouped into selections from a single drop-down list. This makes those pages simpler and easier to use.

The Product tab has been removed in this release.

Warning: Do not open a new window during a browser session and navigate to the same page in the two windows simultaneously. The following processes, along with their associated subtabs, will not work if you attempt to use two windows to access the same application page at the same time:

- Compensation plans
- Formulas
- Plan elements

- Resources

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

- [Section 1.5.2, "The Home Tab"](#)
- [Section 1.5.3, "The Incentive Tab"](#)
- [Section 1.5.4, "The Modeling Tab"](#)
- [Section 1.5.5, "The Resource Tab"](#)
- [Section 1.5.6, "The Quota Tab"](#)
- [Section 1.5.7, "The Transaction Tab"](#)
- [Section 1.5.8, "The Requests Tab"](#)
- [Section 1.5.9, "The Administration Tab"](#)

1.5.2 The Home Tab

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

1.5.3 The Incentive Tab

The Incentive tab is where compensation plans are built, viewed, and activated. There are seven subtabs. The Credit Rules subtab is new in this release.

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. On the Agreement subtab you can also activate agreement definitions into working compensation plans. In this release, the Activation subtab is consolidated into the Agreement subtab.

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.

The Credit Rules subtab is where you create and edit the credit rules used in Sales Credit Allocation.

1.5.4 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.

1.5.5 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.

1.5.6 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 four subtabs are Allocate, Processing, Report, and Import. The Import subtab is new in this release.

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 Process subtab is where you approve, distribute, and activate quota. This release consolidates into one subtab the Approve, Distribute, and Activate subtabs from the previous three releases that used the HTML user interface. The three functions are:

- **Approve:** Converts a quota, after it is allocated to a resource, into a generated contract, which is submitted to the contract approver for approval. The approver receives notification that a contract has been submitted and must approve or reject it.
- **Distribute:** Is used to distribute approved contracts.
- **Activate:** 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.

The Import subtab enables work on agreements and contracts offline. Compensation planners can download sales force agreements and personalize them. Contract approvers can download contracts to spreadsheets and validate, approve or reject them offline. Then, the agreements and contracts can be uploaded into the application.

1.5.7 The Transaction Tab

The Transaction tab contains nine subtabs: Collect, Import/Export, Adjust, Load, Calculate, Notification Log, Payment, Commission Statement and Report. The Commission Statement subtab is new in this release.

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.

The Import/Export subtab gives users the ability to upload and download additional setups. 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 Commission Statement subtab to run a Commission Statement report.

Use the Report subtab to refer to the eight Compensation reports. See [Section 4.51, "Reports"](#).

1.5.8 The Requests Tab

The Requests tab is where you can make concurrent requests to perform collection, calculation, payment, and transfer and process transactions for Sales Credit Allocation. There are six subtabs: Collection, Transaction, Calculation, Payment, Allocation Transfer, and Allocation Process. The Allocation Transfer and Allocation Process subtabs are new in this release.

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.

Use the Payment subtab to delete a payrun, create a worksheet, or pay a payrun.

Use the Allocation Transfer subtab to send transactions to the Sales Credit Allocation engine.

Use the Allocation Process subtab to process transactions in the Sales Credit Allocation engine.

1.5.9 The Administration Tab

The Administration tab > Incentive subtab 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 23 selections. The Source Table Mapping subtab is new in this release.

The primary functions of the subtabs are listed below:

Source Table Mapping - Map the source tables used in Sales Credit Allocation.

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 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.

Verify Mandatory Dependencies

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, "Oracle Incentive Compensation Mandatory Dependencies"](#)
- [Section 2.2, "Oracle Incentive Compensation Integrations"](#)
- [Section 2.3, "How to Verify Specific Set Ups for Dependencies"](#)

Projected Compensation is a new feature in this release. To learn more and to set up integration with Oracle Quoting or a third party quoting application, see [Section 2.2.6, "Oracle Quoting or Third Party Quoting Application"](#).

2.1 Oracle Incentive Compensation Mandatory Dependencies

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

- Oracle Resource Manager
- Oracle General Ledger
- Web ADI

2.2 Oracle Incentive Compensation Integrations

These are integrations for Oracle Incentive Compensation:

- Oracle Order Management or third party transaction source
- Oracle Workflow

- Oracle Field Sales
- Oracle Telesales
- Oracle Payroll
- Oracle Quoting
- Oracle Payable
- Oracle Receivables
- Oracle Territory Manager
- Oracle Human Resources

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 [Section 4.51, "Reports"](#)).
- Use Oracle Field Sales for Income Planner and resource self service needs
- Project commissions for salespeople using Oracle Quoting or a third party quoting application (new in this release)

Using Oracle Human Resources, you can map to job titles for Incentive Planning.

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.

2.2.1 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 collected 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 (claw-back) postings, which are generated when an invoice due date goes beyond the set grace period. The credit for the sale is deducted from the resource's sales credit.
- Give-back postings which are generated when a past due invoice that has been deducted from the resource's sales credit is paid. The resource receives the credit.

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.

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
- Create hierarchies

In addition to these traditional sources of information, release 11*i* of Oracle Incentive Compensation provides integration to applications such as Oracle Field Sales and Oracle Quoting.

Oracle Field Sales relies upon Oracle Incentive Compensation to provide a sales performance and compensation forecasting tool for sales representatives and managers, based on current compensation plans. Oracle Incentive Compensation also provides the means for monitoring sales force performance through self-service compensation reports, the Year-to-Date Commission Summary and the Quota Performance Report. Resources can view their compensation summary and break down their commissions by deal, product line, period, adjustments, or transactions.

Oracle Quoting uses Oracle Incentive Compensation to project commissions for salespeople. Oracle Incentive Compensation receives data through an API and then sends back projected commissions to Oracle Quoting. The salesperson must have a sales role and a valid and complete compensation plan with valid plan elements. The plan elements must be Commission type, and the formula package must be generated and have a VALID status. All dates must be within the date range requested by Oracle Quoting. Because the projected commissions calculator is less complex than a compensation plan, the projections are approximate. The more complex the compensation plan, the more inaccurate the projection can be. See [Section 2.2.6, "Oracle Quoting or Third Party Quoting Application"](#).

Oracle Payable is used to pay people who are not full-time, regular employees. Oracle Payable recognizes resources for payment only if they are activated as suppliers. See [Section 2.2.4, "Oracle Payable"](#).

Oracle Payroll is used by the application to pay employees. See [Section 2.2.5, "Oracle Payroll"](#).

Oracle Territory Manager provides the ability to integrate with the Territory Assignment Engine during the collection process. This is important for Sales Credit Allocation. See [Section 2.2.7, "Oracle Territory Manager"](#) and [Section 4.46, "Sales Credit Allocation Setup"](#).

Oracle Workflow is a workflow management system that is used by Oracle Incentive Compensation to integrate business processes. It can be used to notify individuals that action is required, a process is complete, or that a concurrent process has run into a problem. For example, Workflow is used to notify resources when a compensation plan is ready to be accepted, and is used in Sales Credit Allocation for handling discrepancies between transactions and resources. See [Section 2.3.5, "Creating a Workflow With Notifications"](#).

Oracle Human Resource Management System (HRMS) You must first create employee resources in Oracle HRMS in order for them to be paid compensation in Oracle Incentive Compensation. See [Section 2.3.4, "Creating an Employee"](#).

2.2.2 Oracle Field Sales

The Compensation tab > Compensation Plan subtab in Oracle Field Sales can be used by:

- A resource to view performance and commission statements.
- 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 Field Sales, 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 Field Sales.

You can also access the Compensation tab from Oracle Incentive Compensation with the Sales Force User responsibility.

Perform the following procedure to enable access to the Compensation tab in Oracle Field Sales.

Login

Log in to Oracle Forms.

Responsibility

System Administrator

Steps

1. Create an employee in HRMS manager (see the *HRMS User Guide* for details) or a supplier vendor in Oracle Payable for a nonemployee (see [Section 2.3.6, "Creating a Supplier Contact"](#)).
2. Import the resource into Resource Manager (see the *Resource Manager User Guide* for details).
3. Create a username and password for the resource in System Administrator with Oracle Field Sales usage.
 - a. In the System Administrator Navigator, select Security.
 - b. Expand the Security menu by double-clicking on Security.
 - c. Double-click User.

- d. Double-click Define.
 - e. Enter your User's name in the User Name field. Start the search from the Menu bar by clicking **View > Query by Example > Run**. (Pressing the Control key and the F11 key together performs the same function.)
 - f. Assign Sales Online User responsibility to the user.
 - g. Save.
4. Switch responsibility to Resource Manager.
5. In Resource Manager, assign the role type of Sales to the user with a manager or member role.
 - a. Double-click Maintain Resources.
 - b. Double-click Resources.
 - c. Search for the resource.
 - d. Click Resource Details.
 - e. Assign the Sales role type.
 - f. Save.
6. Assign Group usage Sales and Telesales for the group to which the user belongs.
 - a. In the Resource Manager main menu, double-click Maintain Resources.
 - b. Double-click Groups.
 - c. Search for the resource's group name.
 - d. Click the Usage tab.
 - e. Enter the Sales and Telesales usage.
 - f. Save.
7. Create all compensation plan setups in the HTML version of Oracle Incentive Compensation.
8. To log in to Oracle Field Sales, use the username and password that were created in step 3.

2.2.2.1 Planning

Planning allows both managers and resources to provide feedback about the estimated sales amount that they feel is achievable. See the *Oracle Incentive Compensation User Guide*, Chapter 1, for details.

2.2.2.2 Compensation Plan

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

As a manager, you can see compensation plans for which you are responsible in the first area and also the resources to whom the plans can be assigned. You can then distribute compensation plans in the My Salespeople area. See the *Oracle Incentive Compensation User Guide*, Chapter 1, for details.

2.2.2.3 Income Planner

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

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

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

To enable Income Planner in Oracle Field Sales, perform the following procedures in Oracle Incentive Compensation.

Login

Log in to Oracle HTML Applications

Navigation

Incentive > Expression > Create

Steps

To create Forecast expressions, do the following:

1. Enter a name for the input formula.

2. In the Details area, select Others from the Type drop-down list.
3. Enter Forecast Amount from the Calculation Values block to the Expression block.
4. Add any other elements to the Expression block that you need. Forecast Amount **MUST** be one of the elements selected as part of your expression if the expression is to be used in Oracle Field Sales.
5. Click **Update** to save the input expression.
6. Repeat steps 1 through 5 to create an output expression.
Note: The output expression must contain Rate Table Result as the first element selected and Forecast Amount should appear in the expression as well.
7. Click **Update** to save your output expression.

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

1. Click the Formula subtab in the Incentive tab.
2. Select the formula you want from the table or use the search parameters to search by name, type, or status.
The Formula Definition page appears.
3. Click the Expressions link to open the Expressions page.
4. In the Input area, select your input forecast expression from the drop-down list.
5. In the Output area, select your output forecast expression from the drop-down list.
6. Click **Update**.
7. Perform this series of steps for each formula in your compensation plan.

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.

2.2.2.4 Reports

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

- **Year to Date Summary:** This report is an overview of a resource's achievements, commission and bonus earnings and advances or draws. The figures are grouped by period and by plan element. The SuperUser can control which plan element appears as a quota or bonus category through the Quota Group box on the Plan Element form. The payout section is grouped by earnings type and by period.
- **Quota Performance:** This report is a snapshot of a resource's achievement and earnings. Achievements are shown against interval to date quota and annual quota. Earnings total are broken down by period to date and interval to date.
- **Earnings Statement:** This report shows transaction details broken down by period for a resource. It is configurable and you can hide or show selected columns. You can use search parameters to make the report specific to your needs. This report was called the Commission Statement in previous releases.
- **Commission Statement:** The new Commission Statement Report includes a Balance Summary that shows balances, earnings, recoverable and nonrecoverable amounts, payment due and ending balance. In the Commission Summary section a resource can select details for commission, bonus, or payment adjustments. This section also includes a graph.

To view the reports, see the *Oracle Incentive Compensation User Guide*, Chapter 1, for details.

2.2.2.5 Top Performers Bin

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

- View total payments by quarter.

- Show reports for direct and indirect resources in the same organization.
- Show Year to Date as well as quarterly information.
- View payments and earnings in the currency you select.
- View the payments and earnings for the accounting calendar by manager.

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

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

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

To set up the Top Performers bin on your Oracle Field Sales home page, See the *Oracle Incentive Compensation User Guide*, Chapter 1, for details.

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

Login

Log in to Oracle Forms

Responsibility

Oracle Sales Administrator

Steps

1. Select System Administrator responsibility and navigate to Security > Responsibility > Define.
2. Query for Oracle Sales Administrator. (See Guidelines).

3. Note down the request group (Sales and Marketing Super User) that the responsibility belongs to. (See Guidelines)
4. Return to the Navigator window and navigate to Security > Responsibility > Requests.
5. Query for the Sales and Marketing Super User request group.
6. In the Requests area, add the Refresh Top Performers Report request.
7. Save.
8. Switch the responsibility to Oracle Sales Administrator.
9. Run these concurrent requests:
 - Refresh AS_PERIOD_DAYS table
 - Refresh Multi-Currency Conversion Rate (AS_PERIOD_RATES)
 - Refresh Top Performers

Guidelines

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

2.2.2.6 Forecast Hierarchy Drilldown to Year to Date Summary

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

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

See the *Oracle Incentive Compensation User Guide*, Chapter 1, for details.

2.2.3 Oracle Resource Manager

Use Resource Manager to:

- Create resources
- Create sales roles and assign them to resources

- Create compensation groups and teams
- Create hierarchies

Refer to appropriate sections of the *Oracle CRM Application Foundation Implementation Guide* or *Oracle CRM Foundation User Guide*.

2.2.3.1 Create Resources

Resources that are salespeople are created in HR using Forms. You then must import them into Resource Manager. In order for a resource to receive commission payments in Oracle Incentive Compensation, the resource must be created, imported, assigned a sales compensation role and assigned a compensation group. The roles and groups are created in Resource Manager, and the assignment takes place when the resource is imported from HR. Resources that are not salespeople, for example, Other or TBH (to be hired) are not imported from HR, but are created directly in Resource Manager. See the *Creating and Importing Resources* chapter in the *Oracle CRM Application Foundation Implementation Guide* for the procedures.

2.2.3.2 Create and Assign Sales Roles

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

2.2.3.3 Create Compensation Groups

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

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

2.2.4 Oracle Payable

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

Oracle Payable recognizes resources for payment only if they are activated as Suppliers through Oracle Purchasing. Please refer to Oracle Purchasing documentation for more information. To pay full-time, regular employees, use Payroll (See [Section 2.2.5, "Oracle Payroll"](#)).

To enable integration with Oracle Payable, perform the following procedure:

Prerequisites

A vendor site contact is defined in Oracle Purchasing and imported into Resource Manager. See [Section 2.3.6, "Creating a Supplier Contact"](#).

Navigation

Administration > Incentive

Steps

1. In the Payment area, check the Implemented Oracle Accounts Payable box.
2. Optionally, indicate where the General Ledger account (expense and liability) is defined in Oracle Incentive Compensation. See Guidelines.
3. Click **Update**.

Guidelines

The vendor contact's organization must be the same as the organization that pays them.

General Ledger accounts can be defined at the following levels:

- Plan Element: Expense and Liability accounts must be defined at the plan element level.
- Revenue Class: Expense and Liability accounts must be defined at the revenue class level.
- Classification Rules: A ruleset of type Account Generation must be created to define conditions and their corresponding accounts.

- Custom: A custom Workflow function must be defined and added to the custom flow in the Account Generation Workflow process. Use this option when the other three options cannot be used to generate the expense and liability accounts.

The Oracle Payable invoice tables that are populated by Oracle Incentive Compensation are:

- AP_INVOICES_INTERFACE
- AP_INVOICE_LINES_INTERFACE

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

AP_INVOICES_INTERFACE	Populated with
INVOICE_ID	AP_INVOICES_INTERFACE.S.NEXTVAL
INVOICE_NUM	CN_PAYMENT_TRANSACTIONS.PAYMENT_TRANSACTION_ID
INVOICE_DATE	CN_PAYRUNS.PAY_DATE
VENDOR_ID	PO_VENDOR_SITES.VENDOR_ID
VENDOR_SITE_ID	PO_VENDOR_SITES.VENDOR_SITE_ID
INVOICE_AMOUNT	CN_PAYMENT_TRANSACTIONS.PAYMENT_AMOUNT
INVOICE_CURRENCY_CODE	FUNCTIONAL CURRENCY CODE
PAYMENT_CURRENCY_CODE	REP CURRENCY CODE
SOURCE	"OSC" (NEW quick code of type SOURCE)
ACCTS_PAY_CODE_COMBINATION_ID	CN_PAYMENT_TRANSACTIONS.LIABILITY_CCID
INVOICE_TYPE_LOOKUP_CODE	CREDIT (if amount <0); STANDARD (if amount >0)

AP_INVOICE_LINES_INTERFACE	Populated with
INVOICE_ID	Same value as entered for AP_INVOICES_INTERFACE
INVOICE_LINE_ID	AP_INVOICE_LINES_INTERFACE.S.NEXTVAL
LINE_NUMBER	1
LINE_TYPE_LOOKUP_CODE	ITEM
AMOUNT	CN_PAYMENT_TRANSACTIONS.PAYMENT_AMOUNT
DIST_CODE_COMBINATION_ID	CN_PAYMENT_TRANSACTIONS.EXPENSE_CCID

2.2.5 Oracle Payroll

You can integrate Oracle Incentive Compensation with Oracle Payroll for employee type resources. When enabled, this integration transfers data from Oracle Incentive Compensation to the Oracle Payroll Batch Element Entry (BEE) interface. Oracle Incentive Compensation has an API that calls the payroll package to populate data into the BEE interface.

To set up the payroll integration, perform the following procedure:

Prerequisites

A resource must already be set up in Resource Manager and be assigned to a role with a compensation plan.

Responsibility

Incentive Compensation Super User

Steps

1. Check the payroll integration flag on the System Parameters page. See [Section 4.2.4, "Payment"](#)
2. Make sure that the pay elements are set up in Oracle Payroll.
3. Map plan elements in Oracle Incentive Compensation to pay elements in Oracle Payroll. See [Section 2.2.5.1, "Mapping Plan Elements to Pay Elements"](#).
4. Map Pay Element Input Values. See [Section 2.2.5.2, "Mapping Pay Element Input Values"](#).

2.2.5.1 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 must be defined in Oracle Incentive Compensation and pay elements must already be created in Oracle Payroll.

Steps

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

1. Enter the changes.
2. Check the Remove box if you want to eliminate the plan element to pay element mapping.
3. Check the Inactive Employees box if you want to keep the mapping but not use it now.

Steps 2 and 3 are completed when you click **Update**.

4. You can click the Element Input link to go to the Pay Element Input Values Mapping page.
5. Click **Update**.

To enter a new mapping, perform the following procedure.

1. Enter a plan element in the first blank plan element field.
2. Enter the pay element from Payroll that you want to use.
3. Enter a Start Date and an End Date.
4. Click **Update**.

Guidelines

The payroll mapping is stored in these tables:

- CN_QUOTAS_PAY_ELEMENTS_ALL
- CN_PAY_ELEMENT_INPUTS_ALL

The Payment Transactions page shows the transactions grouped by pay element.

2.2.5.2 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

Prerequisites

Plan elements and pay elements must already be created.

Steps

1. Click the link in the Element Inputs column.
The Pay Element Input Values Mapping page appears.
2. Enter a table name in the first blank field in the Table Name column.
3. Enter a column name in the Column Name column.
4. To remove a saved line, check the box in the Remove column and click **Update**.
5. Click **Update**.

2.2.6 Oracle Quoting or Third Party Quoting Application

In this release, there is a new public API which you can use to project commission for salespeople. Projected Compensation provides an estimation of projected variable compensation earnings and their potential impact on quota attainment. By displaying potential compensation for any given opportunity, quote, or sales cycle milestone, Projected Compensation lets the sales force make informed decisions on how they sell, and enables management to influence the sales force through positive or negative behavior reinforcement.

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

The projection calculator cannot be configured with the complexity of an actual compensation plan, so projections are estimates only and are not guaranteed

amounts. The more complex the compensation plan, the more inaccurate the projection can be. A disclaimer is provided.

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

- resource_id
- Sales_credit_amount
- calc_date
- currency_code
- projection_identifier

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

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

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

Plan Element Name (PE_NAME)

Projected Compensation (PROJ_COMP)

Plan Element Quota (PE_QUOTA)

Plan Element Quota Achieved (PE_ACHIEVED)

Plan Element Credit (PE_CREDIT)

Plan Element Interval (PE_INTERVAL)

Setups

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

1. Define input and output calculation expressions to be used by the Projected Compensation API. See [Section 4.7, "Define Calculation Expressions"](#).
2. Reference the expressions in a formula as forecast input expressions and forecast output expressions. The formula must be of the Commission type. The expressions can reference calculation values from the following tables:
 - CN_QUOTAS
 - CN_SRP_PERIOD_QUOTAS
 - CN_PERIOD_QUOTAS
 - CN_SRP_QUOTA_ASSIGNSSee [Section 4.10, "Define Formulas"](#).
3. Configure the Plan Element Classification Ruleset to include the Projection identifiers that are sent to the Projected Compensation API. These identifiers identify the appropriate plan element to be used to determine the projected compensation for a given transaction. You must use the Rules Attributes hyperlink for the corresponding rule in the Rules Hierarchy to configure the projection identifiers. See [Section 4.36.1, "Build a Rules Hierarchy"](#) for the steps.

Integrating with Oracle Quoting

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

When integrating with Oracle Quoting, you must set the system profile ASO: Calculate Projected Commission to Yes.

Integrating with a Third Party Quoting Application

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

1. Populate the API table with data
2. Call the Projected Compensation API with the required parameters.

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

2.2.7 Oracle Territory Manager

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

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

2.2.7.1 Integrate with the Territory Assignment Engine

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

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Navigation

Log in to SQL.

Steps

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

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

2. Compile and apply the revised `CN_POST_COLLECTION_TAE_PUB` package to the database.
3. In the Post-Collection user code block, make the following call:

```
CN_POST_COLLECTION_TAE_PUB.Get_Assignments
(
  p_api_version          => l_api_version,          -- IN parameter
  p_init_msg_list       => l_init_msg_list,        -- IN parameter
  p_commit              => FND_API.G_FALSE,        -- IN parameter
  p_validation_level    => l_validation_level,     -- IN parameter
```

```

x_return_status      => x_return_status,      -- OUT parameter
x_msg_count          => x_msg_count,          -- OUT parameter
x_msg_data           => x_msg_data           -- OUT parameter
);

```

4. Save and generate the Collection package.

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

2.2.7.2 Modify the Code in the API Template

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

Steps

1. Populate data from Oracle Incentive Compensation transaction interface table (cn_comm_lines_api) into the TAE input interface table (jtf_tae_1001_sc_trans).
Populate SOURCE_ID with -1001, TRANS_OBJECT_TYPE_ID with -1002, TRANS_OBJECT_ID with COMM_LINES_API_ID, and WORKER_ID with 1. For details of the Territory qualifier attribute mapping in jtf_tae_1001_sc_trans, please refer to Oracle Territory Manager documentation.
2. Make the TAE call to process the territory assignment of transactions (see Guidelines).
3. Read the winning territory-resource data from the TAE output table (jtf_tae_1001_sc_winners).
4. Update the original transactions with new winning territory resource information.

Guidelines

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

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

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

2.2.7.3 Column Mapping of Account Qualifiers to JTF_TAE_1001_SC_TRANS

In Oracle Incentive Compensation, Sales Credit Allocation uses the Account transaction object. The following section shows the data mapping between the Account transaction object qualifier attributes and the corresponding value column columns in the JTF_TAE_1001_SC_TRANS table.

The account qualifiers are categorized into four types.

- **Type 1:** No Oracle dependencies; can be used for any mapping. Type 1 qualifiers can be repurposed because there are no dependencies other than aligning your API call to the territory setups.
- **Type 2:** Oracle Trading Community Architecture (TCA) dependencies. This means that you must store your customer data in TCA.
- **Type 3:** Oracle Accounts Receivable (AR) dependencies, specifically for seeded values in the HZ_LOCATIONS table. This means that you must seed these lists of values to use them.
- **Type 4:** Oracle Field Sales dependencies, specifically for seeded interest codes in the AS_INTERESTS table. You must seed these lists of values to use them.

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

1. Is this a stand alone implementation of Oracle Incentive Compensation?
 - a. If the answer is No, is your customer data stored in TCA?
 - If Yes, you can use qualifiers of type 1 and type 2.
 - If No, you can use qualifiers of type 1.
 - b. If the answer is Yes, and you want to create territories that use a qualifier of type 2, you must place your customer data into TCA.
 - c. If the answer is Yes, you can use one of the qualifiers of type 1 for any purpose without dependencies.
2. Are you creating territories that use a qualifier of type 3 or type 4?

- a. If the answer is Yes, you must seed values appropriately.
- b. If the answer is No, then ignore this question.

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

Table 2-1 Account Qualifier Mapping

JTF_TAE_1001_SC_TRANS Column	Account Qualifier	Type	Comments
SOURCE_ID	-	N/A	Must be -1001
TRANS_OBJECT_TYPE_ID	-	N/A	Must be -1002
TRANS_OBJECT_ID	-	1	Map to unique OIC transaction identifier
TRANS_DETAIL_OBJECT_ID	-	2	Only if your customer record is stored in Oracle's Trading Community Architecture, this is a unique identifier to the party site ID on a transaction. Otherwise, set it to NULL
-	Account Classification	4	This qualifier derives its values from a set of lookups and requires account classifications to be set up in Oracle Field Sales.
SQUAL_NUM02	Account Code	2	Only if your customer data is stored in Oracle's Trading Community Architecture (TCA), maps to TCA's PARTY_SITE_ID
SQUAL_NUM04	Account Hierarchy	2	Maps only to parties rolling up to a specific PARTY_ID within Oracle's Trading Community Architecture
SQUAL_CHAR08	Area Code	1	Area Code
SQUAL_CHAR09	Category Code	2	Maps only to TCA's CATEGORY_CODE
SQUAL_CHAR02	City	3	Maps only to Cities set up in Oracle AR (Need to seed HZ_Locations table to use)
SQUAL_CURC01	Company Annual Revenue (Currency Code)	1	Currency of Company Annual Revenue, for example, EUROS (Both SQUAL_CURC01 and SQUAL_NUM06 need to be populated)

Table 2–1 Account Qualifier Mapping

JTF_TAE_1001_SC_TRANS Column	Account Qualifier	Type	Comments
SQUAL_NUM06	Company Annual Revenue	1	Company Annual Revenue, for example, 100,000,000 (Both SQUAL_CURC01 and SQUAL_NUM06 need to be populated to work together)
SQUAL_CHAR07	Country	3	Maps only to Countries set up in Oracle AR (Need to seed HZ_Locations table to use)
SQUAL_CHAR03	County	3	Maps only to Counties set up in Oracle AR (Need to seed HZ_Locations table to use)
SQUAL_NUM01	Customer Name	2	Maps only to Party IDs set up in TCA, identifying a unique customer
SQUAL_FC01	Customer Name Range (First Character: for LIKE processing)	1	First character of Customer Name Range (Both SQUAL_FC01 and SQUAL_CHAR01 need to be populated to work together)
SQUAL_CHAR01	Customer Name Range	1	Customer Name Range (Both SQUAL_FC01 and SQUAL_CHAR01 need to be populated to work together)
SQUAL_NUM10	DUNS Number	2	Maps only to DUNS Number of parties set up in TCA
SQUAL_NUM05	Number of Employees	1	Number of Employees
SQUAL_CHAR06	Postal Code	1	Postal Code
SQUAL_CHAR05	Province	3	Maps only to Province set up in Oracle AR (Need to seed HZ_Locations table to use)
SQUAL_NUM03	Sales Partner Of	2	Maps only to parties that are partners of a specific PARTY_ID in TCA
SQUAL_CHAR10	SIC Code	2	Maps only to SIC Codes set up in TCA
SQUAL_CHAR04	State	3	Maps only to States set up in Oracle AR (Need to seed HZ_Locations table to use)
WORKER_ID	N/A	N/A	Must be set to 1

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

Steps

1. Create a territory.
2. Modify the code in Oracle Incentive Compensation (CN_POST_COLLECTION_TAE_PUB)
 - a. Go to section or comment, which says == > " OIC CODE TO INSERT DATA INTO JTF_TAE_1001_SC_TRANS GOES HERE"
 - b. Enter the following SQL script.

```

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

```

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

3. Call CN_POST_COLLECTION_TAE_PUB.Get.Assignments as a post collection action for transaction source order booking/Receivable posting.
 - a. Log in to JSP.
 - b. Click Administration > Incentive > Collection > Action.
 - c. Select Order Booking.
 - d. Select Post-Collection in the user code section.
 - e. Enter the following code

```
CN_POST_COLLECTION_TAE_PUB.Get.Assignments(1.0)
```

- f. Click **Update**.

Guidelines

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

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

2.3 How to Verify Specific Set Ups for Dependencies

You must be able to complete each of the following tasks successfully for your applications to work properly. If you are unable to complete a task successfully, then correct the problem before continuing.

2.3.1 Creating an FND User

You must create an FND user if you want to give access to the application to a particular resource. For example, in Oracle Incentive Compensation, you need to give access to analysts. Perform the following steps to create an FND user in the Application Object Library.

Reference

Oracle Applications System Administrator's Guide, Managing Oracle Applications Security

Login

Log in to Oracle Forms

Prerequisites

A person must be defined as an employee and as a resource in the database first before receiving FND user access.

Responsibility

System Administrator

Navigation

Security > User > Define

Steps

1. In the User window, enter a new user name.
2. Enter a password, and re-enter it for verification.
3. Select the employee's name.
4. In the Responsibilities subtab, select the CRM HTML Administration responsibility.
5. Save the new user.

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

1. Log in 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

Login

Log in to Oracle Forms

Responsibility

System Administrator

Navigation

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

Login

Log in to Oracle Forms

Responsibility

System Administrator

Navigation

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.

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

Login

Log in to Oracle Forms

Responsibility

US HRMS Manager or US Super HRMS Manager

Navigation

People > Enter and Maintain

Steps

1. Enter the following employee information in the appropriate form fields:
 - Last Name
 - First Name
 - Title
2. Select the person's gender.
3. Select a type of Employee.
4. Enter the person's social security number.
5. Save.

2.3.5 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

Login

Log in to Oracle Forms

Responsibility

Workflow Administrator

Navigation

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.

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.

2.3.6 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.

For purposes of collecting transactions and paying commissions, Oracle Incentive Compensation treats a supplier contact the same as any other resource.

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.

Login

Log in to Oracle Forms

Responsibility

Purchasing

Navigation

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.

Implementation Overview

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

[Section 3.1, "Process Description"](#)

[Section 3.2, "Implementation Task Sequence"](#)

3.1 Process Description

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

3.2 Implementation Task Sequence

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

Notes: In the Step column, an asterisk (*) means that the step is only required if Incentive Planning is used. Incentive Compensation is abbreviated as IC and Incentive Planning is abbreviated as IP in the Responsibility column.

Prerequisites

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

- *Oracle System Administrator's Guide*

■ *Supplemental CRM Installation Steps Release 11i*

Table 3–1 Oracle Incentive Compensation Process

Step	Description	Forms or HTML	Responsibility
1. General Ledger Setups	Define period types, calendar, periods, currency, and set of books.	Forms	System Administrator
2. System Parameters	Pick a set of books, and set up parameters for collection, calculation, payment, Income Planner disclaimer.	HTML	IC Super User, IC Analyst, IC Analyst
3. Open and Close GL Periods	Create Period Type, Create Accounting Calendar, and Activate Pay Periods.	HTML	IC Super User, IC Analyst, IP Analyst
4. Open Accumulation Periods	Set the status of the accumulation periods.	HTML	IC Super User, IC Analyst, IP Analyst
5. Define Tables	Optional. Define tables and columns used in collecting transactions into the application.	HTML	IC Super User, IC Analyst, IP Analyst
6. Define External Table Mapping	Optional. Join external tables to destination tables in the application.	HTML	IC Super User, IC Analyst, IP Analyst
7. Define Calculation Expressions	Define input expressions, output expressions, and performance measures, and create bonus calculation expressions.	HTML	IC Super User, IC Analyst, IP Analyst
8. Define Rate Dimensions	Define the tiers that are used in a rate table.	HTML	IC Super User, IC Analyst, IP Analyst
9. Define Rate Tables	Set up compensation percentage rates or fixed amounts for different performance levels.	HTML	IC Super User, IC Analyst, IP Analyst
10. Define Formulas	Set up how compensation is calculated in a plan element.	HTML	IC Super User, IC Analyst, IP Analyst
11. Associate Responsibilities with Responsibility Groups*	Optional. Assign access privileges to responsibilities in Incentive Planning.	Forms	System Administrator
12. Define Default Contract Text	Optional. Customize and define the text that accompanies a compensation plan. Also, define workday calendar.	HTML	IC Super User, IC Analyst, IP Analyst
13. Define User Access*	Optional. Define the groups to which an Incentive Planning Finance Manager has access.	HTML	IC Super User

Table 3–1 Oracle Incentive Compensation Process

Step	Description	Forms or HTML	Responsibility
14. Define Quota Components*	Optional. Define the parts used to create agreements in Incentive Planning.	HTML	IC Super User, IC Analyst, IP Analyst
15. Define Attainment Schedule*	Optional. Set up attainment schedules, which calculate earnings for different levels of quota attainment.	HTML	IC Super User, IC Analyst, IP Analyst
16. Define Roles	Define the details of sales roles, which describe a set of resources that share a common compensation structure.	HTML	IC Super User, IP Analyst
17. Define Agreement Details	Complete the definition of the rate table and quota anchor details for a sales role.	HTML	IC Super User, IP Analyst
18. Define Job Titles*	Optional. Assign roles in Oracle Incentive Compensation to job titles in Human Resources. Refer to: Appropriate sections or the <i>HRMS Implementation Guide</i> or <i>HRMS User's Guide</i> (Resource Manager)	HTML	IC Super User, IC Analyst, IP Analyst
19. Associate Jobs with Roles*	Optional. Performed in Resource Manager.	Forms	System Administrator
20. Define Resource Groups	Performed in Resource Manager. Refer to: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation User Guide</i> (Resource Manager)	Forms	System Administrator
21. Define Resources	Performed in Resource Manager. Also set up teams. Refer to: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation User Guide</i> (Resource Manager)	Forms	System Administrator
22. Assign Resources to Roles and Groups	Refer to: Appropriate sections of <i>CRM Foundation Implementation Guide</i> or <i>CRM Foundation User Guide</i> (Resource Manager)	Forms	System Administrator
23. Assign Job Titles to Roles*	Optional. Assign job titles used in Incentive Planning to a role for a given date range.	HTML	IC Super User, IC Analyst, IP Analyst
24. Assign Job Titles to Resources*	Optional. Performed in Resource Manager.	Forms	System Administrator

Table 3–1 Oracle Incentive Compensation Process

Step	Description	Forms or HTML	Responsibility
25. Customize On Target Earnings and Anchors*	Optional. Customize these parts of the role definition for individual resources.	HTML	IC Super User, IP Analyst, IP Contract Approver, IP Finance Manager, IP Sales Manager
26. Assign and Distribute Quotas to Resources*	Optional. Assign and distribute quotas to resources.	HTML	IC Super User, IP Analyst
27. Resources Accept Plans Using Oracle Field Sales*	Optional. Resources can log on to Oracle Field Sales and accept their contracts using the Compensation tab.	HTML	Field Sales User
28. Activate Pay Periods	Activate a pay period before paying a payrun.	HTML	IC Super User, IC Analyst, IP Analyst
29. Define Pay Groups	Defines frequency of payments for resources assigned to a pay group.	HTML	IC Super User, IC Analyst, IP Analyst
30. Set up Collections	Optional. Set up transaction sources, source tables, queries, collection mapping, direct and indirect mappings, and add user code blocks and filters. Generate and run collections.	HTML	IC Super User, IC Analyst, IP Analyst
31. Set up Expense and Liability Mapping	Optional. Used to set up outside suppliers and vendors to use Oracle Payable.	HTML	IC Super User, IC Analyst, IP Analyst
32. Set up Plan Element to Oracle Payroll Pay Element Mapping	Optional. Integrates Oracle Incentive Compensation with Oracle Payroll.	HTML	IC Super User, IC Analyst, IP Analyst
33. Map Classification Attributes and Collection Attributes	Define descriptive flexfields in the CN_COMMISSION_HEADERS table.	HTML	IC Super User, IC Analyst, IP Analyst
34. Define Revenue Classes	Set up user-defined categories to determine sales credit.	HTML	IC Super User, IC Analyst, IP Analyst

Table 3–1 Oracle Incentive Compensation Process

Step	Description	Forms or HTML	Responsibility
35. Define Revenue Class Hierarchy	Set up or modify the relationship between revenue classes.	HTML	IC Super User, IC Analyst, IP Analyst
36. Define Classification Rulesets for Revenue Classification	Set up rules hierarchy for classifying sales transactions as they enter the application.	HTML	IC Super User, IC Analyst, IP Analyst
37. Define Interval Types	Optional. Set up specific periods during which sales accumulate to determine commission rates.	HTML	IC Super User, IC Analyst, IP Analyst
38. Define Credit Types	Optional. Define monetary and nonmonetary credit types used in the application.	HTML	IC Super User, IC Analyst, IP Analyst
39. Define Plan Elements	Build plan elements from formulas, rate tables, revenue classes, and transaction factors.	HTML	IC Super User, IC Analyst, IP Analyst
40. Define Compensation Plans	Build compensation plans from plan elements. Make changes to existing compensation plans.	HTML	IC Super User, IC Analyst, IP Analyst
41. Define Roles	Create sales roles in Resource Manager.	Forms	System Administrator
42. Define Compensation Groups	See step 20.	Forms	System Administrator
43. Define Resources	See step 21.	Forms	System Administrator
44. Assign Resources to Roles and Groups	See step 22.	Forms	System Administrator
45. Assign Compensation Plans to Roles	After creating a compensation plan, assign it to sales roles.	HTML	IC Super User, IC Analyst, IP Analyst
46. Sales Credit Allocation	Set up sales credit allocation.	HTML	IC Super User, IC Analyst
47. Define Payment Plans	Optional. Create optional plans to set up advance or deferred payments.	HTML	IC Super User, IC Analyst, IP Analyst

Table 3-1 Oracle Incentive Compensation Process

Step	Description	Forms or HTML	Responsibility
48. Assign Pay Groups	Resources must be assigned a pay group to receive compensation. You also can assign a pay group to a role.	HTML	IC Super User, IC Analyst, IP Analyst, IP Contract Approver, IP Finance Manager, IP Sales Manager
49. Assign Payment Plans	Optional. Assign payment plans created in step 46 to resources or roles.	HTML	IC Super User, IC Analyst, IP Analyst, IP Contract Approver, IP Finance Manager, IP Sales Manager
50. Customize Quota and Rates for Resources	Optional. Make changes to plan elements of a compensation plan for a specific resource.	HTML	IC Super User, IC Analyst, IP Analyst, IP Contract Approver, IP Finance Manager, IP Sales Manager
51. Reports	Optional. Describes the 10 Incentive Planning and 9 Compensation reports available in the application.	HTML	IC Super User, IC Analyst, IP Analyst, IP Contract Approver, IP Finance Manager, IP Sales Manager (direct reports only)
52. Verify the Implementation	Check to be sure everything works.	Forms HTML	System Administrator IC SuperUser

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, "Agreement Details"](#)

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- Section 4.18, "Define Job Titles"
 - 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 Job Titles to Roles"
 - 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 Field Sales"
 - 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, "Sales Credit Allocation Setup"](#)
- [Section 4.47, "Define Payment Plans"](#)
- [Section 4.48, "Assign Pay Groups"](#)
- [Section 4.49, "Assign Payment Plans"](#)
- [Section 4.50, "Customize Quota and Rates for Resources"](#)
- [Section 4.51, "Reports"](#)
- [Section 4.52, "Verify the Implementation"](#)

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, 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.

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. If no periods are defined in General Ledger, Oracle Incentive Compensation cannot collect transactions or make payruns.

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.

Login

Log in to Oracle HTML Applications

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Parameter

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

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

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.
2. This information is displayed 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

These selections affect how transactions are collected.

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, Salesperson 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 Salesperson 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 salesperson batch size is a rough equivalent to the maximum number of concurrent manager slots and the number of server processors available. You can then fine tune the numbers to get the best setting for your setup.

The 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 or N, it allows all plan elements in a period to be calculated incrementally. Before enabling the profile option, be sure that any transactions that have a processed date earlier than the latest processed date showing in the System Parameter window have been calculated.

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

Check the Managerial Rollup box if you want sales credits to roll up through the compensation group hierarchies. If the box is checked, Oracle Incentive Compensation awards indirect credit for each transaction whose direct credit receiver is in the compensation group hierarchy. This parameter affects all transactions--you cannot selectively allocate indirect credit on a transaction-by-transaction basis.

Steps

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

4.2.4 Payment

These selections affect how payment is made.

Steps

1. Check the appropriate box to indicate whether Oracle Payable and Payroll are implemented.
2. From the Account Generation drop-down list, select Revenue Class, Plan Element, Custom, Classification, or None. This tells the application from what level you want account codes to be generated.

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 Yes or Y for the account to be populated to the Accounts Payable interface.

There are four levels of detail where population can occur:

- Classification - The application takes expense and liability accounts that are provided on the Ruleset Details page and passes that information to Accounts Payable.
- Plan Element - The application takes expense and liability accounts that are provided on the Plan Element page and passes that information to Accounts Payable.
- Revenue Class - The application takes expense and liability accounts that are provided on the Revenue Class Summary page and passes that information to Accounts Payable.
- Custom - The Custom option provides flexibility for companies that want to pass along expense and liability data which are independent of the normal Oracle Incentive Compensation classification process. Mapping to this data is required.

Note: 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 Income Planner in Oracle Field Sales. A typical disclaimer warns the user that amounts generated using Income Planner may not match the exact amount of commission paid.

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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

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. If the period type you need is already defined, proceed to section 4.3.2. To create a period type, perform the following procedure:

Navigation

Administration > General > Calendar Type

Steps

1. Enter the number of periods per year.
2. Select a year type of Calendar or Fiscal.
3. Optionally, enter a description of the period type.
4. Click **Update**.

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:

Navigation

Administration > General > Accounting Calendar

Steps

1. Query for a calendar type.
2. 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.
3. Select a type.
4. Enter the year, month, and number.

Number indicates the sequence of the period. For monthly periods, for example, enter 4 for April, 8 for August, and so on.
5. Enter dates in the From and To columns.
6. The Name field is required, but it is automatically populated by the application.

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**.
7. Click **Update**.

4.3.3 Activate Pay Periods

You must have an active pay period in order to use Oracle Incentive Compensation to pay commission to salespeople.

To activate pay periods, perform the following procedure:

Navigation

Administration > Incentive > Pay Periods

Steps

1. In the Period Status column, select Active next to the period you want to activate.
2. Click **Update**.

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 Field Sales.

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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Accumulation Period

Steps

1. Select a year and click **Apply**.
The accumulation periods for the selected year are displayed.
2. For each period, choose a period status:
 - Never Opened
 - Future - Entry
 - Permanently Closed
 - Open

- Closed
3. Check the Freeze box if you want to use the data in a Year To Date Summary report.
 4. Click **Update**.

Guidelines

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

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

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

Cannot close a period when previous period is not closed.

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

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

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 Oracle Incentive Compensation. Tables must be defined before they can be used in collection or calculation. See [Section 4.33, "Map Classification Attributes and Collection Attributes"](#).

To define tables, perform the following procedure.

Prerequisites

Tables must exist in the database.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Navigation

Administration > Incentive > Tables

Steps

1. Query a table.
2. Enter a Schema in the Schema field.
3. Enter a Table Name from which you want to collect data.
4. Enter a User Name.
5. In the Usage column, select Collection, Calculation, or None.
6. Click **Update**.

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 data type and data length, and contains boxes for Usage and Foreign Key.
- The Dimensions view contains a field for Dimension Name and a Value box.
- The Classification view provides a Value 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 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 currently not used. 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.

Login

Log in to HTML Applications.

Responsibility

Incentive Compensation Super User

Navigation

Administration > Incentive > Tables > Columns

Steps

1. The Columns view is the default display. Select a different view if necessary.
2. To use the Columns view, click **Apply**.
The page display changes to the view you have selected.
3. For the Columns view, perform the following steps:
 - a. You can change the name in the User Name field to assign a name that is used in your business or is easy to understand.
 - b. The Data Type field indicates if the column contains alphanumeric material (VARCHAR2), numerical data (NUMBER), or a date (DATE).
 - c. The Data Length column indicates the length of the data, which is already defined in the database.
 - d. Check the Usage box to identify whether this column is available to build expressions for formulas.
 - e. The Foreign Key box indicates that the column is a foreign key. This feature is currently not in use.
 - f. Click **Update**.
4. For the Dimensions view, perform the following steps:
 - a. You can 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. The dimension name identifies the dimension (of hierarchies) associated with this column.
 - c. The Value box indicates if the User Name column is being used or not.
 - d. Click **Update**.

5. For the Classification view, perform the following steps:
 - a. You can change the name in the User Name field to assign a name that is used in your business or is easy to understand.
 - b. Check the Value box next to a column to indicate that the column can be used in the classification process.
 - c. Select the data type for the column (Alphanumeric, Numeric, or Date.)
 - d. The Value Set Name is used to set a value when this column is defined as a rule attribute.
 - e. Click **Update**.
6. For the Primary key view, perform the following steps:
 - a. You can change the name in the User Name field to assign a name that is used in your business or is easy to understand.
 - b. The Primary Key box indicates that this column is a primary or part of a primary key. It is currently not in use.
 - c. Position indicates the position of this column if the primary key is a composite primary key. It is currently not in use.
 - d. Click **Update**.

4.6 Define External Table Mapping

If the information you need is in tables that are external to Oracle Incentive Compensation, you can join those tables to destination tables in Oracle Incentive Compensation. To do this, perform the following procedure.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > External Table

Steps

1. You can query for a join condition by entering a search string and clicking **Apply**.

Note: This search is case sensitive.

2. Enter a name for the condition in the Name column.
3. In the Usage column, select Collection or Calculation.
4. Enter the source table.
5. Enter a name of the destination table in Oracle Incentive Compensation.
6. Click **Update**.

The Alias is system generated and the Columns link appears in the External Columns column.

7. Click **Columns** in the External Columns column to open another page where you can specify source and destination columns.
8. Click **Update**.

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, performance measures, forecast expressions, and for projected compensation.

You can use these calculation expressions as performance measures, input expressions, output expressions, or rate table dimensions. You can also embed one calculation expression within another.

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.

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

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 formula output result is used in the expression. Sequencing plan elements in a compensation plan can also assure that calculations are performed in the order you need.

In this release, user defined functions give you more freedom in building an expression. You can add functions to an expression that are not available in the expressions builder on the Create Expressions page. This feature is used in the procedure below. See Guidelines for an example of a user defined function.

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. A simple input formula expression looks like this:

TRANSACTION_AMOUNT

For example, a company can establish that its sales force will be compensated based on transaction amount. The input expression 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 TRANSACTION_AMOUNT input expression, 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

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

Example of an output expression:

Rate Table Result * (TRANSACTION_AMOUNT * PAYMENT_FACTOR)

In this example, 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.

Using the above output expression, with a payment factor of 1.05, the calculation looks like this:

$$5\% * (\$100 * 1.05) = \$5.25$$

4.7.3 Performance Measures

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

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

TRANSACTION_AMOUNT

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

4.7.4 Defining Calculation Expressions

Use the following procedure to define calculation expressions.

Prerequisites

Table and column mapping is complete.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Expression > Create

Steps

1. On the Calculation Expression Details page, enter a unique name for the expression.
2. Select a View.

The six 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.
3. From the Calculation Values box, select the column to be used in the expression.
4. Click the right 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.
5. 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.
6. Use the Function field to enter a user created function into the expression. See Guidelines.

7. You can add numeric constants or string values 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.
8. Add elements and operands until the expression is complete.
9. 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.
10. Select a plan element metric. Use the right shuttle box arrow to add the plan element and metric to the expression. See Guidelines.
11. Click **Update**.
The status of the expression reads Valid if it has compiled properly.
12. The usage of the expression is also displayed once it is saved. The usage rules determine where the expression may be applied. See Guidelines.

Guidelines

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.

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

In SQL Plus, the function is:

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

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

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

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

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

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

- As the input of a commission type formula which allows multiple inputs
- As the output of the forecast version of a formula
- As the input of the forecast version of a formula which allows multiple inputs
- As the tier expression of a dynamic dimension
- As a forecast input or output expression

4.7.5 Create Bonus Calculation Expressions

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

However, because bonus expressions, unlike commission expressions, are not based on 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 "[Bonus Formula](#)" 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.

Guidelines

To create a Bonus Plan element, see [Section 4.39.4, "Creating a Bonus Plan Element"](#).

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.

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

Note: This release 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
Peripherals

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

The 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 calculation expressions must already be defined. To use this method of creating rate dimensions, the rate table must already be created. To create rate dimensions before a rate table is created, navigate to Administration > Incentive > Rate Dimensions, and click **Create** on the Dimensions page.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Login

Log in to Oracle HTML Applications.

Navigation

Incentive > Rate

Steps

1. Click the name of the rate table for which you want to create or edit a dimension.

The Rate Table Details page appears.

2. 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.

3. To create a new dimension, click **Create**.

The Dimension page appears. The fields are blank.

4. 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.
5. Select or verify the type from the drop-down list.
6. 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.
7. If you want to add a tier, use the blank fields at the bottom of the table.
8. To delete a tier, click the Remove box next to the tier and click **Update**.
9. Click **Update**.
10. 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 be sure that the formula input type matches the rate table dimension type. If they do not, the generated formula package assumes that all of the inputs evaluate to numeric values, and an error message and XCALC status results.

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.

Rate tables contain one or more dimension, of an amount, percent, expression, or string type. The rate table input depends on the kind of dimensions that are used. A multidimensional rate table can use different kinds of dimensions to generate a percent or amount result. See [Section 4.8, "Define Rate Dimensions"](#).

In this release, sparse rate table implementation adds a significant performance enhancement to rate tables. Storing only those rate tiers with a commission amount of non-zero saves a lot of overhead when changing a rate table. A dense implementation stores all of the rate tiers, including those with 0 commission, requiring much more work when changing the table. See [Example of Sparse Implementation](#) below.

To define rate tables, perform the following procedure:

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Rate > Create

Steps

1. Enter a unique name for the rate table.
2. Select a Rate Table type
3. Click **Update**.
4. To add an already created dimension to the rate table, query it on the Rate Table Details page. See Guidelines.
5. To assign or change commission rates, click the Commission Rates link to go to the Rate Table Detail - Commission Rates page. You can click the Rate Table link to return to the Rate Table Details page.
6. To create a new dimension, on the Rate Schedule Detail page, click **Create**.
The Dimensions page appears.
7. After you have assigned the dimensions you need to the rate table, click **Update**.

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.

A rate table can be customized for an individual resource. See [Section 4.50, "Customize Quota and Rates for Resources"](#) for details.

Example of Sparse Implementation

This is an example of sparse implementation. A three-dimensional rate table that is 100 by 100 by 100 tiers contains 1,000,000 total combinations of tiers. Each tier combination is mapped to a number from 1 to 1,000,000. Each tier has a sequence number, and from that number you can easily derive the tier combination. In a dense implementation, when you try to change the rate table to include an extra dimension or change the size of one of the dimensions, all 1,000,000 of the tier combinations must be modified to ensure that the sequence mappings are correct. This can cause a significant performance problem.

With sparse implementation, if only 50 of those 1,000,000 tier combinations are valid combinations with non-zero commission amounts, only those 50 combinations are stored. If you query the commission amount for a tier that is not stored, the rate table simply returns 0. If you modify the rate table, then instead of changing 1,000,000 rate tiers, you need to change only 50.

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.

To create formulas, perform the following procedure.

Prerequisites

Calculation expressions and rate tables must be created first.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Formula > Create

Steps

1. In the General area, enter a unique name and a description for your formula.
2. Enter a type of Commission or Bonus. (See Guidelines)
3. In the Rules area, indicate whether to apply transactions Individually or by Group. (See Guidelines.)
4. From the Split list, select No Split, Proportional, or Non-Proportional. (See Guidelines)
5. Check the Cumulative box if you want to aggregate the transactions. (See Guidelines.)

6. Check the Interval To Date box if you want to base the calculation on a period different from the plan element interval. (See Guidelines)
7. Check the Planning box if this formula is used for plan modeling purposes.
8. Click **Update**.
9. Click the Expressions link on the side panel menu.
The Formula Detail - Expressions page appears.
10. You can click the Formula Name link to return to the Create Formula page.
11. In the Input area, select an expression 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.
12. You can assign a forecast.
13. In the Output area, select an expression.
14. You can select a forecast.
15. In the Performance Measure area, select an expression. The performance measure, as well as the quota, is used in reports for comparison with achievement.
16. Click **Update**.
17. Click the Rate Tables link on the side panel menu to assign a rate table to the formula.
The Rate Tables page appears.
18. Query for a rate table.
19. Enter an effective start date and end date.
20. You can view the rate table details and rates by clicking **Rate Table Details**.
21. 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. See Guidelines.
22. Click **Update**.

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 "[Bonus Formula](#)".

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.

Check the Cumulative box if transactions are required to be aggregated in total. The rate applied will be determined by the transactions-total achieved to date within the interval.

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.

You must generate a formula for it to be available when you are selecting formulas for a plan element. Formulas that do not have a Complete status do not appear in the Formulas drop-down list. When you generate a formula the application verifies

that the expressions and rate tables are compatible and that they will work when they are called during the calculation process.

Dependency Notes

Commission Formula

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).

Bonus Formula

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

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 within the application, such as Incentive Planning Analyst, Incentive Planning Contract Approver, and Incentive Planning Manager. However, you can create your own responsibilities to meet your business requirements. For example, you can create US Planning Analyst, Europe Planning Analyst, and Australia Planning Analyst, all with the same job function.

Whether the responsibilities are seeded or created by you, Oracle Incentive Compensation uses responsibility groups to assign access privileges to them. These groups determine which groups and resources the person assigned to the responsibility can work on. The five available responsibility groups are Super User, Finance Manager, Contract Approver, Sales Manager, and Sales Force User. All seeded responsibilities are already placed in appropriate responsibility groups during installation of the application, but any new responsibility that you create for use in Incentive Planning must be assigned a responsibility group.

This can be done by setting the OSC: SFP Responsibility Group profile for the responsibility. A typical responsibility group setup is displayed below:

Responsibility	Responsibility Group
Incentive Planning Analyst	Super User
Incentive Planning Finance Manager	Finance Manager
Incentive Planning Contract Approver	Contract Approver
Incentive Planning Sales Manager	Sales Manager
Sales Force User	Sales Force User

Login

Log in to Oracle Forms.

Responsibility

System Administrator

Navigation

Profile > System

Steps

1. In the Find System Profile Values window, check the Responsibility box.
2. Enter Incentive in the Responsibility field. Click **Find**.
The Responsibilities window opens.
3. Select Incentive Planning Analyst. Click **OK**.
4. In the Find System Profiles window, enter OSC%Resp% in the Profile field.
The System Profile Values window opens.

5. In the Responsibility column, in the row for OSC:SFP Responsibility Group, select the access for the Super User responsibility from the list of values. Click **OK** in the list of values window.
6. Repeat steps 7 through 9 for each of the other responsibilities.
7. Save.
8. 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Settings

Steps

1. If you plan to use a workday calendar, select a Transaction calendar from the drop-down list on the Settings page.
Five Day Week is the default value. You can set other transaction calendars at Administration > General > Transaction Calendar.
2. Enter the title of the contract in the Contract Title field.
3. Enter the Eligibility Rules in the Club Qualification text box.
4. Enter the Terms & Conditions of the Compensation Plan.
5. Enter the Approver's details in the Approver section.
6. Click **Update**.

Guidelines

The text in the Terms & Conditions text box can be made to refer to the location of the Terms & Conditions. Example, "I accept the Terms & Conditions as set out in the Company Handbook that is posted on the Notice Board or the Company Handbook that was issued with the Employment Contract." This text will appear at the bottom of the Compensation Plan that will be generated later. The Approver's details will appear at the bottom of the Compensation Plan as well.

The Terms & Conditions text box can also contain hyperlinks to other text.

The contract text is expanded to hold up to 2000 characters in this release.

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 fiscal year. You need to assign a new workday calendar every year as the dates of weekends and many holidays change from year to year.

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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > General > Transaction Calendar

Steps

1. To modify the days of the week of an existing transaction calendar, check or uncheck the appropriate boxes. To modify exact dates, see step 8.
2. To create a new transaction calendar, enter the name of the new calendar in the first empty name field.
3. Optionally, enter a description.
4. Check the boxes for the days of the week that you want to designate as workdays in the transaction calendar.
5. Click **Update** to save your work. Before clicking Update, you can return to the previously saved settings by clicking **Restore**.
6. 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 box. See Guidelines for more details.

7. Check the box next to any date that you want to set as a business day.
8. Uncheck the box next to any date that you want to designate as a holiday.
9. 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.

Navigation

Administration > Incentive > Settings

Steps

1. Select a transaction calendar from the drop-down list.
2. Click **Update**.

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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Navigation

Administration > Incentive > User Access

Steps

1. Select a User.
The User Access Details page opens.
2. On the User Access Details page, enter a compensation group in the Compensation Group column.
Only groups with a usage of "Sales Force Planning" can be selected.
3. Select an organization.
4. Select an access level of Update or View.

5. Click **Update**.

4.14 Define Quota Components

Components are parts of an agreement created in Incentive Planning, and are either fixed or variable. Fixed pay components correspond to fixed payouts, such as salary, which are the same for each pay period and are not based on quota attainment or revenue achievement. Payouts from variable pay components change depending on sales activity and are associated with commission.

Variable pay components can be based on a quota or be non quota based. Non quota based components have a commission payout that is not dependent upon quota attainment. For example, a non quota based component can be assigned that pays 5% of revenue achievement, regardless of quota.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Component

Steps

1. To create a new component, enter a name in the first blank field in the Name column. To make changes to an existing component, query it.
2. Select a type.
3. Select a unit type of Unit or Revenue.
4. Check the Computed Flag box if the value of the component is to be derived from a formula.
5. Click **Update**.
6. If you want to delete a component, check the Remove box and click **Update**.

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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Agreement > Sales Role Detail > Edit hyperlink

Steps

1. Select a component.
2. Enter the percentage against this selected component. Repeat steps 1 and 2 until all variables of the formula have been defined.
3. Click **Save** to save new information.

Guidelines

The percentages entered against each component selected are multiplied with the value of each component. The results of all multiplication are 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Attainment

Steps

1. Enter the name of the attainment schedule you want to create in the blank field in the Attain Schedule Name column.
2. Click **Update**.
3. Click the new name from the Attainment Schedule Summary.
The Define Attainment Schedule page opens.
4. Enter percentages in the blank fields.
If you need more than two fields, click **Update** and two more blank fields appear under the saved ones.
5. Repeat until your attainment schedule is complete.
6. Click **Update**.

Guidelines

To delete an attainment schedule, check the Remove box and click **Update**. You cannot delete an attainment schedule that is already assigned to a role. To change the name of an attainment schedule, create a new schedule with the same percentages, assign it to the role, and remove the old schedule.

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 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.

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

Navigation

Administration > Incentive > Seasonality > Click Create

Steps

1. Enter a name for the new seasonality schedule in the name field. This is a required field.
2. Enter a description.
3. Select a year.
4. 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.
5. Click **Update**.
6. Click **Validate** to verify that your percentages add up to 100 percent. If validation is successful, then the Validation Status in the top area of the page reads *Valid*.

Guidelines

You must click Update to save a new seasonality schedule *before* clicking Validate. If you click Validate without clicking Update first, it will return the percentage entries to 0.

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 already be created.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Navigation

Incentive > Agreement

Steps

1. 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.
2. You can click the Contract Text link to go to the Agreement Details - Contract Text page.
3. You can copy the fields from an existing role by selecting it and clicking **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. Use a rounding factor if you want to round the assigned quota.
For example, input 1000 if you want the assigned quota to be rounded up to the nearest 1000. **Note:** Rounding factor must be base 10 (10, 100, 1000, and so on.)
6. In the Quota Minimum and Quota Maximum fields, enter the range of quota figures that this role should have.
7. 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.
8. Select an Attainment Schedule that is applicable to the compensation plan for this role.
9. Check the Club Eligible box if this role is entitled to Club participation on achieving Club rules.
10. 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).
11. Select Variable Pay, Non Computed Components:
 - a. Enter the name of the component.
 - 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.
Note: This percentage must be entered for the Distribute Quota function to work.
 - d. Enter the amount of commission at 100% of attainment.
 - e. You can select a seasonality schedule. The default seasonality schedule is even.
 - f. Select a calculation formula.
To appear in the list, the formula must be cumulative and the Planning box must be checked.
 - g. Select a rate table.

Compensation Plan Levels are used in the Quota Model Summary and Average Quota Summary Reports where the quota for each Component are totaled for each level of resources in the Salespeople Hierarchy for the selected parameters (example, Organization, Effective Date) of each Report.

The Attainment Schedule is used in the Compensation Contract where earnings for each level of achievement are displayed.

Oracle Incentive Compensation automatically accounts for seasonality when it calculates prorated annual quotas.

4.17 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.

Login

Log in to Oracle HTML Applications.

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 the example that follows).
3. In the Rate Range area, you can enter the Minimum Rate and Maximum Rate for each tier of the Rate Table.

4. In the Multi-Tier Rate Table Anchors area, enter the Percent of Attainment in the first column. This is displayed based on the rate dimension definition. You can change only the first and last values in this column (See the example following).
5. In the Anchor Type column, select the method of commission calculation to be used. Choose Amount if you are entering the commission earnings amount for each attainment/achievement level. If 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 the following example for more explanation.
6. Click **Update**.

Example of Two Methods of Anchor Rate Calculation

There are two methods of Anchor Rate calculation, Line and Step. These methods are used to fill in the Commission rates for the rate tables created when you activate an agreement and push the plan into the Commission module of Oracle Incentive Compensation.

Step calculation simply uses the amounts in the anchor (expected commission column), with no calculation. When attainment reaches the percent in the tier, the commission amount shown in the tier is paid. The Line method calculates commission on a sliding scale, with commission depending on the exact rate in each separate tier of the rate table, calculated on a sliding scale.

Here is an example of how Line and Step calculation works:

Step 1. Create a rate dimension in the administration part of Oracle Incentive Compensation:

Attainment
0-25%
25-50%
50-75%
75-100%
100-999%

Step 2. Assign the rate dimension to a rate table. Here the dimension type is percent and the rate type is amount:

From	To	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:

From	To	Commission Rate
0	25%	0
25%	50%	100,000
50%	75%	150,000
75%	100%	180,000
100%	999%	200,000

Step 5. If the anchor calculation method is Line calculation, commission rates for the rate table will be calculated as follows (TQ = 20,000 total quota):

- 1st Tier (1 - 25%)

100,000 - 0 / (25% - 0%) TQ

100,000 / 25% * 20,000 = 20

- 2nd Tier (25% - 50%)

(150,000 - 100,000) / (50% - 25%) TQ

50,000 / 25% * TQ = 10

- 3rd Tier (50% - 75%)

(180,000 - 150,000) / (75% - 50%) TQ

30,000 / 25% * TQ = 6

- 4th Tier (75% - 100%)

(200,000 - 180,000) / (100% - 75%) TQ

20,000 / 25% * TQ = 4

- 5th Tier (100% - 999%)

(200,000 - 200,000) / (999% - 100%) TQ = 0

Note: Real data will be set up so that the commission rates increase from tier to tier.

Step calculation can be used only for rate 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 Job Titles

Job titles are created in Human Resources (HR), but are important for Incentive Planning. Sales roles must be assigned to job titles for quota modeling purposes. Use the page to view a list of current job titles. Click a Job Title to access the Resource Details - Job Title Details page, where you can view sales roles assigned to the job title, assign a sales role to the selected Job Title, and assign start and end dates for that role.

Prerequisites

Resources must be set up in Oracle Resource Manager.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Job Titles

Steps

1. Query for a job title by name or by job code.

2. 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.
3. To add a role, enter it in the Role column.
4. Enter a start date and end date. The end date is not required.
5. Click **Update**.

Guidelines

If you are using the 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 information on how to define resources.

4.19 Associate Jobs with Roles

This procedure is done in Resource Manager. See [Section 2.2.3, "Oracle Resource Manager"](#).

4.20 Define Resource Groups (Compensation Groups)

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

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

4.21.1 Sales Compensation Payment Analyst Role Type

The Sales Compensation Payment Analyst is a new role type in this release. Use it whenever you define an analyst in Resource Manager for use in Oracle Incentive Compensation.

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

If you have analysts that were defined prior to this release that use a Sales Compensation role, remove that role and group member role and assign the Sales Compensation Payment Analyst role.

4.21.2 Set Up Resources for Team Compensation

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

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

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

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 the appropriate sections of the *Oracle CRM Foundation Implementation Guide* (Defining Dynamic Groups) or *Oracle CRM Foundation User Guide*.

Prerequisites

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

Login

Log in to Oracle Forms.

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.

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

11. Save.
12. Click the Group tab and assign a group.
13. Save.
14. On the Resources tab, select a sales credit type.
15. 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 Job Titles to Roles

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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Job Titles

Steps

1. Query for a job title.

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

2. Associate a new role to the Job Title Code and Job Code by entering it in the Role field.

3. Enter a start date for the role. An end date is optional.
4. Click **Update**.

4.24 Assign Job Titles to Resources

This procedure is performed in Resource Manager. See [Section 2.2.3, "Oracle Resource Manager"](#).

4.25 Customize On Target Earnings and Anchors

On Target Earnings and Anchors are part of the definition of sales role details in Oracle Incentive Compensation. 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User
Incentive Planning Analyst
Incentive Planning Contract Approver
Incentive Planning Finance Manager
Incentive Planning Sales Manager

Navigation

Resource > Planning

Steps

1. Query for a resource.
The Resource Details - Main page appears.
2. Click the amount in the On Target Earnings column.
The Resource Details - On Target Earnings page appears.
3. Enter revised amounts in the fields for the Fixed and Variable Amount fields.
4. To customize anchors, click **Anchor** in the Details column in the Variable, Quota Based area.
The Resource Details - Customized Anchors page appears.
5. In the Rate Schedule Detail section, enter the commission rate range for each tier of the Rate Table.
6. 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.
7. To view rate tables for variable non-quota elements, click the Rate link in the Details column of the Variable, Non-Quota area.
8. Click **Update**.

Example

In the example below, at 0% achievement of quota, the variable pay is zero. At 25% of quota, the additional variable pay is 5,000. At 50% of quota achievement, the additional variable pay is increased to a maximum of 12,000. This means that the earnings in the 25-50% tier of the rate table are compensated at a higher percentage than the 0-25% tier. At the 100% level of quota achievement, the additional variable pay is 20,000. Any achievements over 200% of quota are capped by entering the same value as the previous tier (no additional variable pay) against the highest rate tier.

Anchor	Type	Pay
0	Amount	0
25	Amount	5,000
50	Amount	12,000

Anchor	Type	Pay
100	Amount	20,000
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.

Login

Log in to Oracle Workflow Builder.

Responsibility

Incentive Planning Analyst

Incentive Planning 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. Save.

Guidelines

Workflow Attributes are commands to fetch actual values. Example, &FORWARD_FROM_NAME in the Body tab will enable the name of a user with Contract Approver responsibility to appear in the email alert. The Workflow Attributes can be identified as they are text expressed in capital letters and preceded by &. You should edit message text around these Attributes and not to edit the Attributes themselves.

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.

4.27 Resources Accept Plans Using Oracle Field Sales

Resources accept their plans using the Compensation tab. Resources can log in to Oracle Incentive Compensation with a Sales Force User responsibility to accept their compensation plan, or they can log in to Oracle Field Sales to do it.

Prerequisites

Compensation plan must be distributed.

Login

Log in to Oracle HTML Applications.

Responsibility

Field Sales User (In Oracle Field Sales with access to the Compensation tab)

Sales Force User (in Oracle Incentive Compensation)

Navigation

Compensation > Compensation Plan

Steps

1. Click the Sales Role link to go to the Contract page.
2. Review the contract and click **Accept** to accept the contract.
The plan status changes from Issued to Accepted.
3. Click the Printable button to print out a hard copy.

4.28 Activate Pay Periods

Before paying a payrun, you must activate the pay period. To activate a pay period, perform the following procedure:

Prerequisites

Pay periods must be defined in Oracle Incentive Compensation.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Pay Periods

Steps

4. Select a calendar.
5. Click **Apply**.
6. Activate a pay period by selecting **Active** in the Period Status column.
7. Click **Update**.

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. A resource must be assigned a pay group in order to be included in a payrun and receive commission.

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

Use the following procedure to define a new pay group.

Prerequisites

Calendars and related pay periods are defined in GL. Pay periods are activated.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Pay Group

Steps

1. Assign a unique name to the pay group. This field is required.
2. Select an effective start date and end date for the pay group.
3. The calendar and period type are read-only fields taken from the previously defined system parameters. The period type defines the frequency of payments for the pay group.
4. Click **Update**.
After saving, the Details button appears.
5. Click **Details** to view periods and pay group assignments, or to assign a pay group to a role.
The Pay Group Details page appears.
6. Select from the View list and click **Apply**.
The Periods view lists the periods with their start dates and end dates. The Resources Assigned view displays the name, number, start date and end date for any resource already assigned to the pay group. The Role Assignment view shows any assigned roles, and also provides fields to assign the pay group to other roles.
7. With the Role Assignment view selected, select a role name.
8. Enter a start date.
9. Click **Update**.

Guidelines

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

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

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

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

4.30 Set Up Collections

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

Oracle Incentive Compensation collects data from the seeded sources: Oracle Receivables (AR) and Oracle Booking (OC), or from 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

You need 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. To set up a new transaction source that is not one of the two seeded sources, perform the following procedure.

Prerequisites

Tables must be set up already in the transaction source.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection

Steps

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

On the Collection - Transaction Sources page, enter the name of the transaction source in the first empty field in the Transaction Source column.

3. Enter a type, or an abbreviation for a legacy source. See Guidelines for restrictions.
4. Enter a Line Table name.

This tells the application the primary transaction line table to use for collecting transactions.

5. Select a Key Column for the table.

This tells the application the column in the transaction line table that uniquely identifies each transaction.

6. You can remove a transaction source by checking the Remove box and clicking **Update**.
7. Click **Update**.

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 box in the Collect Column next to the event for which you want to collect.
2. Click **Update**.

Guidelines

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

For each Transaction Source there are three pieces of information:

- **Name:** User-defined and changeable, and may include legacy sources.
- **Type:** The short name of the Transaction Source. It is user-defined, must be unique, and cannot be changed after it is created. When creating a new transaction source, the Type (for example, the short name of the transaction source) has the following restrictions:
 - It cannot be empty
 - It must be unique
 - It cannot be the same type as any existing seeded transaction source, such as OC - Order Booking, or AR - Receivables.
 - It cannot be the same as the type of existing receivables events, such as INV, PMT, CBK, or WO.
- **Status:** Complete/Incomplete. This indicates whether the Collection package has been generated for the Transaction Source since the latest setup changes were made.

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

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

Prerequisites

Tables must be registered in the Tables subtab.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Source Tables

Steps

1. On the The Collection - Source Tables page, select a transaction source.
 - Receivables Posting
 - Order Booking
2. Click **Apply**.

The Type and Status fields populate, and any tables that are already defined populate in the fields below.

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

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

Use the queries subtab only to define a Custom Source from which to collect to Oracle Incentive Compensation. The subtab is active only if new transaction sources have been created, because for standard integration with Oracle Receivables and Oracle Order Management, you cannot edit the query conditions.

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. It marks transactions for collection and also enables tracking of those transactions during and after the collection process. The Parameter subsection of the Notification Query area allows you to narrow your focus, for example, by start date and end date.

The 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.

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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Queries

Steps

1. On the Collection - Queries page, enter the name of the parameter in the field.
2. 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.

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. A separate page is used because for any changes made on the Collections page to take effect, it is necessary to regenerate the collections package, whereas the parameter values can be changed without needing to regenerate. See [Section 4.30.10.1, "Define Runtime Parameters"](#).

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

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

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

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

In some cases the Source Expression Field for the mapping, that is, the description of the data used to fill the Destination Column, has been prepopulated and cannot be updated. An example of this is the mapping for Source_Doc_Type, which is set to be the Type that you enter when you name the Transaction Source ('LEG' in our example). Most Source fields are left blank, though, and you have to define the source data for these mappings. You cannot generate a Collection package if any mapping has a blank Source Expression (although you can enter the value NULL in the Source Expression field if you need to).

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

NULL	NULL Value
'My Text'	literal value
booked_date	column_name
l_order_headers.booked_date	table_name.column_name
loh10000.booked_date	table_alias.column_name
NVL(loh10001.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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Mapping

Steps

1. Enter a source expression in the Source Expression field.
2. Enter a destination. Click **Go** to open a list of values. See Guidelines.
3. If necessary, click **Restore** to return to the previously saved information.
4. Click **Update**.

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.

4.30.7 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Mapping

Steps

1. Create a new record in the mappings list.
2. Enter **lsc.salesrep_id** in the Source Expression field.
3. In the Destination field, select a spare column, such as Attribute99, from the LOV.

4.30.7.1 Free-Form Indirect Mapping

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

Prerequisites

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

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Mapping

Steps

1. Create a new record in the mappings list.
2. Enter **FROM l_territories lte WHERE lte.salesrep_id = api.attribute99** in the FROM/WHERE field.
3. Enter **lte.territory_name** in the Source Expression field.

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

4. In the Destination field, select Attribute1 from the LOV.

4.30.7.2 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

Login

Log in to Oracle HTML Applications.

Navigation

Administration > Incentive > External Tables

Steps

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

2. Go back to the Mappings page of the Collections subtab (Administration > Incentive > Collections > Transaction Source > Mapping). Create a new record in the mappings list.
3. 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.

4.30.7.3 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.

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

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

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collections > Actions

Steps

1. Select a location for the user code block from the Location drop-down list. 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
2. Enter the code in the Code field.
3. Click **Update**.

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. Click **Update**.

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.

4.30.9 Generate

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

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection > Generate

Steps

1. 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.
2. Click **Test Generate**.
A test version is generated.
3. 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.
4. Fix the errors and rerun the test generation until you are satisfied with the result.
5. You can click **Yes** or **No** in the Collect Flag to return to the Transaction Sources page and verify it or change it.

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

Guidelines

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

The usual cause of a compilation error is invalid SQL which has been typed in on the Queries or Mappings tabs or in a User code Block. It is easy to identify such problems during the test generation, go back and fix them, and then rerun the test generate.

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

4.30.10 Run Collections

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

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

4.30.10.1 Define Runtime Parameters

Use runtime parameters to narrow the range of transactions collected in a collection package if you are using a custom transaction source. For 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Navigation

Transaction > Collect > Collection Submission - Runtime Parameter

Steps

1. Select the parameter you want to change.
2. Enter a value in the Runtime Parameters field.
3. Click **Update**.

4.30.10.2 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. In the Collection Type field, select a collection type.
2. 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 4.

3. Select Start Period and End Period dates.
4. Click **Submit Request**.
A confirmation window appears.
5. 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.
6. 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.

4.30.10.3 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Navigation

Transaction > Collect > View Request Status

Steps

1. Query by one or more of the following:
 - Collection event type
 - Phase
 - Status
2. You can also enter a search string in the Request ID field.
3. Click **Apply** to view a list of collection submissions.
4. 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.

4.30.11 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Navigation

Administration > Incentive > Collection > Mapping

Steps

1. Enter a source expression in the Source Expression field.
2. Enter a destination.
3. If you want to perform indirect mapping, click **Indirect** to open the Indirect Mapping Details area at the bottom of the page.
4. In the Indirect Mapping Details area, enter a join relationship.
5. Click **Update**.

Guidelines

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

4.30.12 Use Filters

See *Filters* in [Section 4.30.8, "Actions"](#).

4.30.13 Receivables Posting and Order Booking Special Features

4.30.13.1 Receivables Posting

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

- Invoice, credit memo posting
- Payment, giveback posting (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:

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Collection

Steps

1. In the Receivables Event area, check the boxes in the Collect column for which you want to collect transactions.
2. Click **Update**.
3. Click **Generate** to open the Collection - Generate page.
4. 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

4.30.13.2 Order Booking

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

A single collection package, Collect Orders, is 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.

4.30.14 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*.

Coping With Adjustments

You can make adjustments to transactions in your custom transaction sources in the same way as you do with seeded Collections from Oracle Order Management (OC).

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
);
```

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

Note: To understand the `p_org_id` parameter, you need to first understand the Oracle Applications 'Multi-org' strategy, which allows data for multiple operating

units to exist, partitioned from each other, within a single database. Discussion of Multi-org is beyond the scope of this document. 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

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 four levels of detail:

- Revenue Class
- Plan Element
- Classification
- Custom

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

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > System Parameters

Steps

1. Scroll down to the Payment area.
2. Select the level of account generation from the Account Generation.
3. Click **Update**.

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

Navigation

Administration > Incentive > Ruleset

Steps

1. Define the name of the ruleset.
2. Enter a start date and an end date for the ruleset.
3. Select the type of Account Generation.
4. Click **Update**.
5. Click the Rules link in the Rules column.
The Rules Hierarchy page appears.
6. In the lower part of the page, enter a name for the new rule.
7. Add Expense Code and Liability Code names.
8. Click **Update**.
9. Click the Attributes link for the new rule.
The Rule Attributes page appears.
10. Choose an attribute and a value.

11. You can check the Not box to specifically exclude the value of the attribute from classification.
12. Enter any additional attributes for the rule.
Note: Every attribute is assumed to be linked to other attributes with AND. If you want any of the attributes to be related with OR, use the Build Expression tab to relate the first two attributes with AND or OR.
13. Save the rule.
The expression appears.
14. To add rules in the rules hierarchy, position your cursor over the parent rule, right click, and choose New Rule. Repeat the steps.
15. 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 four levels are as follows:

- Revenue Class: Each revenue class will be assigned a specific liability and expense account. This option should be used if tracking expenses for each product is required.
- Plan Element: Each plan element can be assigned a specific liability and expense account. This option should be used if all products assigned to the plan element will be assigned to the same expense and liability account.
- Classification: An entire rule can be assigned a specific liability and expense account.
- Custom: The Custom option provides flexibility for companies that want to pass along expense and liability data which are independent of the normal Oracle Incentive Compensation classification process. Mapping to this data is required.

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

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 Oracle Payroll. To add or change a record, perform the following procedure.

Prerequisites

Plan elements and pay elements must already be created.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Payroll

Steps

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

1. Enter the changes to the Plan Element or Pay Element fields.
2. Check the Remove box if you want to eliminate the plan element to pay element mapping.
3. Click the Inactive Employees box if you want to keep the mapping but not use it now.
4. Click **Update**.

6. 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.
2. Enter the pay element from Oracle Payroll that you want to use.
3. Enter a start date and an end date.
4. Click **Update**.

Guidelines

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

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

In this release, in the Plan Element field, the seeded values of Recoverable and Non-Recoverable are no longer used. There are two new seeded values for the Plan Element field:

- Payment Recovery
- Carry Over Plan Element

If the Pay by Transaction profile is set to No (N), the commission amounts are summarized at the plan element level. Therefore, the pay element name is displayed against the plan element name on the Payment Transactions page if the mapping exists and the payrun date falls within the mapping date range. But, in the

case of a payment recovery, the amounts are aggregated at the resource level and not at the plan element level, so the pay element is listed but the plan element name is not displayed.

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

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

4.32.1 Pay Element Input Values Mapping

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

CN_PAYRUNS
CN_SALESREPS
CN_PAYMENT_TRANSACTIONS

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

Prerequisites

Plan elements and pay elements must already be created.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Payroll

Steps

1. 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.
2. Enter a table name in the first blank field in the Table Name column.
3. Enter a column name in the Column Name column.
4. In a line that is not yet saved, you can click the eraser icon to clear the fields before entering new information.
5. To remove a saved line, check the box in the Remove column.
6. Click **Update**.

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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Tables

Steps

1. In the schema search parameter field, enter CN% to query for Incentive Compensation tables.

Note: Be sure to enter CN in uppercase letters.

2. Click **Update**.

The CN tables are now listed.

3. Scroll down to CN_COMMISSION_HEADERS.

4. In the Details column, click **Columns**.

The Columns page appears.

5. In the View drop-down list, select which columns you want to view.

6. Click **Apply**.

7. Search to find the column name you need.

For Columns or Dimensions, the following steps apply:

8. Enter a user name. Make sure it is easy to understand and use.
9. The Data Type field indicates if the column contains alphanumeric data (VARCHAR2), numerical data (NUMBER), or a date (DATE).
10. The Data Length column indicates the length of the data, which is already defined in the database.
11. Check the Usage box to identify whether this column is available to build expressions for formulas.
12. The Foreign Key box indicates that the column is a foreign key. This feature is currently not in use.
13. Click **Update**.

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 transaction. 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 resources, such as resellers, are only authorized to sell a subset of this offering, the company awards compensation to some of its salespeople for all types of products and services. Thus, for the company, each product or service category is an Oracle Incentive Compensation revenue class.

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

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

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Revenue Class

Steps

1. The Revenue Class page displays all previously defined revenue classes. To define a new revenue class, enter the name in the first blank Name field. The name must not be more than 30 characters long (see Guidelines).
2. Optionally, enter a description. The description often is the same as the name.
3. Select an expense code and a liability code if needed to integrate with Oracle Payable.

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

Guidelines

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

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

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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Hierarchy

Steps

1. Enter a name in the first blank Name column.
2. Enter a Base Table field.
3. Enter a Primary Key.
4. Enter the Hierarchy Values.
5. Click **Update**.
A Confirmation message appears on the screen.
6. Click **Details** to enter the name of the new hierarchy.
The Hierarchies page appears.
7. Enter the name of the new hierarchy in the Name field and click **Update**.
8. Click **Details**.

The Intervals page appears.

9. Enter the start and end dates for the hierarchy.

10. Click **Update**.

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

11. Click **Details**.

The Hierarchies page appears. It displays the existing available root classes. The application provides a default root class called Hierarchy Base Node.

12. 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.

13. To add a child, select the parent revenue class for which you want to add a child.

14. Click the Add Child button.

15. 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

16. Select a new node type.

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

The new revenue class appears in the hierarchy.

18. Repeat the steps to build your hierarchy.

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

Guidelines

You can create as many revenue class hierarchies as you need. However, only one revenue class 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Ruleset

Steps

1. In the first blank field in the Ruleset Name column, enter the name of the new ruleset.
2. Enter a start and an end date for the ruleset.
3. Select a type of Revenue Classification.
4. Click **Update**.

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

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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Ruleset > Click Rules link

Steps

1. Query for a rule.
2. To add a rule, in the lower section of the Rules Hierarchy page, select Root from the Add Rule column list.
3. Name the rule.
4. Assign the rule a revenue class name.
5. Click **Update**.

The rule is displayed in the upper table of the Rules Hierarchy page.

6. 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.

7. In each of the three areas, enter values in the Attribute field:
 - For Single Value attributes, enter a single value.
 - For Range Value attributes, enter a low value and a high value.
 - For Hierarchy values, enter a hierarchy and a value.
8. Each area has a Not Flag column containing a box. Check the box to indicate that you want to exclude that value from the rule. See Guidelines.
9. 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.

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

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

11. 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.

12. Click **Update**.

Guidelines

The classification engines evaluates the rules from top-to-bottom, left-to-right. As soon as a positive match is made and any child rules evaluated, the transaction is classified and no longer evaluated against any other rules. The rules higher in the hierarchy must be built accordingly so that the transactions locate the appropriate rule.

You can define multiple date-effective classification rulesets. Ruleset active dates may not overlap.

When you make changes to a ruleset, you must synchronize it. When you check the Synchronize box and click **Update**, the application generates a PL/SQL script based on the revenue classes and revenue class rules and saves it in an internal table. Before the status changes from Incomplete to Complete, it may display Install Pending. You do not need to synchronize a ruleset if you only rearranged the rules but did not otherwise change them.

A hierarchy of rules can be defined for each ruleset.

Every rule must have at least one attribute.

You can build expressions on the rules using the Build Expression page.

A rule may or may not have a revenue class. If the rule does not have a revenue class, then its children rules must define the revenue class. If a rule has a revenue class, then the revenue class is assigned to the transaction only if none of its child rules match the transaction.

If you specify high and low values in a rule condition, the values can be alphanumeric.

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

Selecting the Hierarchy Values option allows you to enter the value in the hierarchy you want to match. The fields that appear are Hierarchy and Hierarchy Values. If

the value of the transaction attribute rolls up the hierarchy to the value you specify, then the compensation transaction satisfies the condition.

You can specify the inverse of a value you defined by checking the Not box. The compensation transaction satisfies the condition if the attribute is not equal to the specified value, is not between the range of values specified, or does not roll up to the specified ancestor value.

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.

Login

Log in to Oracle HTML Applications.

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 name of the interval in the Name column.

The Interval Numbers page appears.

2. The Interval Number column shows the previously defined interval numbers, based on the calendar and period type shown above.

Select a year 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**.
4. 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**.

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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Credit Type

Steps

1. Query for a credit type.
2. Change the values in the Precision and Extended Precision fields as needed.
Precision defines the number of decimal places in which the credit type can be expressed.
3. If desired, check the Remove box next to a credit type to remove it from the listing when the next Update is performed.
4. Click **Update**.

4.38.2 Add a New Credit Type

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

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Credit Type

Steps

1. Enter a name 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 box if you want the new credit type to be used as the functional currency.
4. Click **Update**.

4.39 Define Plan Elements

A plan element is part of a compensation plan. It specifies the conditions a resource must meet to be eligible for compensation, and it determines how the compensation is calculated. You can assign multiple plan elements to a compensation plan and you can assign a plan element to multiple compensation plans.

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

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"](#)).

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Element > Create

Steps

1. Enter a Name and Description for the new plan element at the top of the page.
2. Select a quota group.
This selection affects how the plan element is displayed in the Year to Date Summary report. See Guidelines.
3. Select a Payment Group.
The default is Standard. See Guidelines.
4. Enter a start date for the plan element.
5. You can enter an end date.
Note: This setting affects how variables are distributed.
6. In the Parameters area, select an incentive type.
Selections include Commission and Bonus, which are calculated differently. See Guidelines.
7. Select an Interval Type.
Interval Type affects the length of time during which transactions are accumulated for meeting sales goals. See Guidelines.
8. Select a Credit Type.

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

9. Select a formula type of Formula or External. Each formula type requires a different action:
 - Formula: Select a formula from the list of values. 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.
10. Optionally, identify an expense account (if integrated with Oracle Payable).
 - a. Query for an expense account.
 - 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.
11. Optionally, identify a liability account (if integrated with Oracle Payable).
 - a. Query for a Liability Account.
 - 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.
12. Check the Eligible for Payee Assignment box if you want to assign the payment to someone other than the resource receiving the sales credit.

For example, this box may be used if the credit receiver leaves the company and a new resource takes over an account
13. In the Variables area, enter an optional Target, Goal, or Fixed Amount. The Sum Revenue Classes box lets you choose to combine the amounts from all revenue classes assigned to the plan element to meet a target or goal. (See Guidelines.)
14. Click **Create**.

Guidelines

Target is the specific amount set for resources as their attainment amount. Resources have views of this figure through their contract. The most common way that a target is used in an expression is for evaluating transactions as a percentage of quota. **Goal** is the amount that management sets as the actual goal expected of the resources. This amount is typically used for reporting purposes and is not exposed

to the resources. **Fixed Amount** is a constant amount that is used for calculation purposes. Resources do not have a view or access to the fixed amount.

The Quota Group offers three choices. If you select:

- None: The plan element name does not display in the Year to Date Summary.
- Bonus: The plan element displays in the Bonus category of the Year to Date Summary.
- Quota: The plan element name displays in the Quota category of the Year to Date Summary.

The Payment Group setting 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 6, 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 7, 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 9, 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:

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

4.39.1 Assign Revenue Classes

A revenue class is a user-defined category of sales for which your organization awards compensation. Each revenue class represents a different type of sale for which your organization pays compensation. Thus, different companies have different revenue classes because each sales organization awards compensation differently. By assigning revenue classes, you specify different ways in which each resource can earn compensation.

Click Revenue Classes in the side panel menu and use the Plan Element Detail - 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Element > Plan Element link > Revenue Classes

Steps

1. Query for a revenue class.
2. Assign a quota to the plan element for the selected revenue class and enter it in the Quota column.
3. Assign a fixed amount to the revenue class for this plan element.
4. Assign a goal in the Goal column for this plan element.
5. Click **Update**.
6. 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 below 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 life 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 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 resources to promote sales of this type of license. When Salesrep A sells something with the revenue class of LIC-DB, the application takes the transaction amount and calculates the amount of sales credit due to Salesrep A. As an example, the net sales credit is \$1,000. The payment factor of 200% is multiplied against this amount to get to the total compensation amount due to Salesrep A, which is \$2,000.

How the Accelerators and transaction factors are used depends on how your calculation expression is defined. For example, a common input expression that complements a percentage rate table is as follows:

`EVENT_FACTOR*QUOTA_FACTOR*TRANSACTION_AMOUNT/TARGET.`

A typical output expression looks like this:

`Rate_Result* TRANSACTION_AMOUNT* EVENT_FACTOR* PAYMENT_FACTOR.`

A quota factor enables a resource to reach higher levels of quota achievement more quickly, resulting in higher compensation payments. This is because Oracle Incentive Compensation uses quota achievement to determine which rate to use.

The payment factor or a quota factor is a percentage expressed as a whole number.

If there is no payment factor or quota factor, calculation defaults to 100%, which means to multiply the calculated payment amount by 1. A factor of 200% (entered as 200) means to multiply the commission amount by 200% or a factor of 2 (as in the above examples).

If you enter a value for a payment or quota factor of less than 100, Oracle Incentive Compensation reduces the incremental credit to the commission payment amount for payment factors or the current quota performance level for quota factors.

Payment factors work only when they are used in the calculation *output* expression assigned to the formula. For example:

`(Rate Table Result*Transaction_Amount)*Payment_Factor`

Quota factors work only when they are used by the calculation *input* expression assigned to the formula. For example:

$$(\text{Transaction_Amount} * \text{Quota_Factor}) / \text{Target}$$

Payment factors can only be used when the Apply Transaction Type is set to Individually as they apply to each individual revenue class. Payment factors have no meaning if the Apply Transaction Type is set to Group by Interval.

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%. 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%. 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Element > Plan Element link > Revenue Classes link > Details link

Steps

1. In the Accelerators area, enter a start date and end date for each accelerator.
2. 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.
3. For already created accelerators, you can check the box in the Remove column and when you click **Update**, the accelerator is deleted.
4. 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.
5. Click **Update**.
6. 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.
7. 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.
8. Click **Update**.

4.39.3 Assign Rate Tables

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

You can assign parent rate tables and also a child 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Element > Plan Element link > Rate Tables

Steps

1. Enter a rate table name in the Name column.
2. Enter an effective start date and end date.
3. You can view the commission rates on the Rate Table Detail - Commission Rates page by clicking **Details** in the Rates column.
4. You can enter a child rate table. Use the same steps as you used for the Parent Rate Table section. See example.
5. Click **Apply** to select a child rate table.
6. You can click the Plan Element Name link at the top to return to the Plan Element Detail page.
7. Click **Update**.

Example

Child rate tables are referenced within embedded formulas. The following example illustrates how child rate tables are used.

First, you create the formula to be embedded, and then create the formula that is referenced by the plan element, which includes the embedded formula within it. Assume that you want to calculate commissions based on percentage of quota, but only for transactions where the sales credit is greater than \$1,000. First you must create an expression to determine if the sales credit is greater than \$1000. The expression looks like this:

```
Commission.Headers.TRANSACTION_AMOUNT/1000
```

Use this expression as the input expression for the embedded formula. If the result is greater than 1, then you know that the sales credit is greater than \$1000.

Next, configure an amount rate table with two tiers (one tier for values less than 1 and one tier for values greater than 1):

Amount	Rate
0-1	0
1-999,999,999	1

In this example, the first tier with an amount of less than 1 has a rate of 0, and in the second tier, anything greater than one has a rate of 1.

Create an output expression that references the rate table result. Select Others from the Type drop-down list and click Rate Table Result.

Next, you need to configure the embedded formula out of the input expression, rate table, and output expression you have just created. It will be referenced by the other formula.

Now you can configure the formula that will be referenced by your plan element. First, configure an expression to reference the formula that you just created. This expression looks like this:

Commission Headers.TRANSACTION_AMOUNT/(SRP Period Quota.TARGET_AMOUNT*<embedded formula>).

Next, create the rate table for your formula, as follows:

Percent	Rate
0-100%	3%
100-9999%	4%

Finally, create an output expression that multiplies your rate table result by the transaction amount:

Rate Table Result*Transaction_Amount

When you build this formula, use the expressions and the rate table you have just created. Then, when you configure your plan element, reference the second formula that you created.

When you save the plan element, the rate tables associated with the formula and with the embedded formula are both associated with the plan element. When you view the rate tables associated with the plan element on the Incentive > Element > Rate Tables page, the Parent Rate Table section shows the rate table that was created for the second formula, while the Child Rate Tables section displays the rate table associated with the embedded formula. Because it is possible to create multiple embedded formulas, OIC provides a drop-down menu that enables you to select any one of the embedded formulas that you may have configured.

4.39.4 Creating a Bonus Plan Element

This is an example of creating a bonus plan element. Bonus calculation is normally based on the total commission earned by the resource or transaction total (sales credit total) of the resource. But in this case the bonus is calculated based on the commission earned by the resource.

The resource has a commission plan element with the following details:

- Input expression = Transaction Amount
- Output expression = Transaction Amount * Rate table result / 100
- Rate table for the commission plan element:

Amount	Commission
0-10,000	1%
10,000-50,000	2%
50,000-100,000	3%
100,000-999999999999	4%

- Commission Plan element Interval = Period
- Apply transaction= Individually

This resource also has bonus plan element with the following details.

- Input expression = Commission_paid_ptd column from a view created based on the cn_srp_period_quotas.
- Output expression = Commission_paid_ptd of the view * Rate table Result / 100
- Rate table for the bonus plan element:

Amount	Bonus
0-500	75
500-1,000	65
1,000-5,000	55
5,000-10,000	45
10,000-9999999999	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
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`

4.40 Define Compensation Plans

When you have created all of the pieces that go into a compensation plan, such as rate tables, formulas, and plan elements, you can assemble them into a compensation plan. After you assign the plan an effective start date and end date, you can assign it to multiple sales roles.

Access compensation plans by navigating to the Incentive tab and clicking the Plan subtab.

To view, change, or create a compensation plan, perform the procedures in the following two sections.

- **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 Create a Compensation Plan

To create a new compensation plan, perform the following procedure:

Prerequisites

Plan elements must already be created. Valid formulas, rate tables, and calculation expressions that are referenced by the plan element must exist.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Plan > Create

Steps

1. In the Name field, assign a unique name to the new compensation plan.
2. You can enter an objective description for this plan based on the associated sales role. The description is used on the resource's contract.
3. Enter a start date and an end date.
4. In the Context Value field, enter a flexfield value if needed.

For more information on flexfields, see [Appendix A.1, "Flexfields"](#) or the *Oracle Applications Flexfields Guide*.

5. Check the Allow Revenue Class Overlap box if the plan elements to use the same 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.

6. Click **Create**.
7. Click the Plan Elements link.
The Plan Details - Plan Elements page appears.
8. Assign the plan elements. (See [Section 4.40.3, "Assign Plan Elements"](#) for specific steps.)
9. Return to the Compensation Plan Details Page.

10. Click **Update**.

The Valididation status changes from Incomplete to Complete.

11. Assign the compensation plan to roles (see [Section 4.45, "Assign Compensation Plans to Roles"](#)).

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 View and Change Compensation Plan Details

In this release, a new page, Compensation Plan: <plan name>, provides a consolidated view of the details of an established compensation plan. The page displays the plan elements, roles, and resources assigned for the compensation plan. You can click the links to view more detailed information. You can sort each section on any column that has a header with an underscore.

Click the links in the side panel menu to view information or to delete plan elements or sales roles, or to view all resources assigned to the plan.

You do not need to perform the following steps sequentially. Select the areas about which you require information or want to make changes.

Prerequisites

You must select a compensation plan on the Compensation Plan summary page.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Plan > Click plan name

Steps

1. The fields at the top of the page display name, description, date, and other information about the compensation plan. The following data can be changed.

- Name
- Description
- Start date
- End date
- Context Value
- Allow Revenue Class Overlap box

Use this option when you need to use a revenue class for more than one plan element. For example, you may have a quota type plan element as well as a bonus based on achieving revenue targets that use the same revenue class.

Note: Some changes may not be permitted, for example, the start date of a compensation plan cannot be changed if by doing so the role assignment dates are outside the date range of the plan.

2. Click **Update**.

3. In the Plan Elements section, click the details link.

The Plan Element Details page appears. There, you can view details about the plan element, including parameters and variables, and make changes to some fields.

4. Return to the Compensation Plan: <plan name> page and click the Formula link.

The Formula Definition page appears. There, you can view or make changes to the formula, including changing the rules or working with expressions or rate tables.

5. Return to the Compensation Plan: <plan name> page and click the Details link in the Rate Tables column.

The Plan Element Details - Rate Tables page appears. There, you can click links to view or change rate table dimensions and commission rates.

6. Return to the Compensation Plan: <plan name> page and click the Details link in the Revenue Classes column.

The Plan Element Details - Revenue Classes page appears. There, you can add or remove revenue classes, set quotas, and define accelerators and transaction factors.

7. Return to the Compensation Plan: <plan name> page and in the Roles section, click the name link.

The Assign Compensation Plans page appears. There, you can remove a role from the compensation plan assignment and assign the role to a different plan.

8. Return to the Compensation Plan: <plan name> page and in the Resources Assigned area, select a role from the View Role drop-down list.

9. Click **Apply**.

The page refreshes and the resources assigned to the role are displayed.

10. Click a name link.

The Resource Detail: Compensation Plans page appears. There, you can view detailed information about the compensation plans and plan elements, and also select or deselect the customized flag for that resource.

11. Return to the Compensation Plan: <plan name> page and click the Plan Elements side panel link.

The Plan Details - Plan Elements page appears. There, you can view and make changes to plan elements, including setting the plan element sequence.

12. Click the Sales Roles side panel link.

The Compensation Plan Details: Sales Roles page appears. There, you can make changes in the sales role assignment, including start and end dates.

13. Click the Salespeople Assigned link.

The Plan Details - Resources Assigned page appears. This read-only listing shows all salespeople assigned to the plan, along with their employee numbers and dates.

4.40.3 Assign Plan Elements

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

Prerequisites

Plan elements must already be created.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Plan > Name link > Plan Elements link

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 Plan Details - Plan Elements page appears.
4. Enter a name or part of a name in the Name field and Click **Go** to open a 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 box and clicking **Update**.
7. You can click the Plan Name link at the top to return to Plan Element Details.
8. Click **Update** to save the plan element assignment. The Description, Start Date and End Date fields will populate automatically.
9. 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 **Sales Roles** to go to the Sales Roles page. That is where you assign the compensation plan to a sales role.

Guidelines

When you click **Update** to save a compensation plan, it is automatically validated. Validating a compensation plan verifies the following:

- The plan has a name and start and end dates.
- The plan has one or more plan elements assigned with start and end dates within the plan start and end dates.

- Each plan element has a rate table with contiguous tiers and with start and end dates within the plan start and end dates.
- Each 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 Validation Status field shows **Complete**. If the Validation Status field displays **Incomplete**, the plan cannot be used to calculate compensation. You must check the items shown above and fix any problems and then **Update** the compensation plan again. Do this until you receive a validation status of Complete.

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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Incentive > Plan > Name link > Sales Roles

Steps

1. Query for a sales role.
2. Enter a start date and an end date for the role.
3. Enter additional sales roles in the blank rows provided.
4. To delete a sales role, check the Remove box. The sales role is deleted the next time Update is clicked.
5. Click **Update**.

Guidelines

A sales role cannot be assigned plans with overlapping dates. For example, if you assign a plan to a role with a start date of 01-Jan-2004 and an end date of 31-DEC-2004, you cannot assign another compensation plan that starts on 01-SEP-2004. The new plan cannot start until 01-JAN-2005.

4.46 Sales Credit Allocation Setup

Sales Credit Allocation is designed to automate the credit allocation process by systematically applying a set of consistent rules. This minimizes errors, thereby reducing the time analysts must spend reconciling them.

To use Sales Credit Allocation, refer to *Oracle Incentive Compensation User Guide*, Chapter 13, Sales Credit Allocation.

Sales Credit Allocation setup requires the steps in this section.

4.46.1 Set up Profile Options

These are the profile options that must be set for Sales Credit Allocation. The following table lists by name and in alphabetical order the system profiles used for Sales Credit Allocation. The table includes the following columns from left to right:

- **Profile Name:** Name of the profile.
- **Description:** Explains what the profile does.
- **Level:** Level at which this profile option can be set. A = Application, S = Site, R = Responsibility, U = User.
- **Default:** Lists the seeded default for the profile, if any.

Profile Name	Description	Level	Default
Total Rev % is Not 100	In Sales Credit Allocation, Revenue Split Total is not 100%.	AS	Custom

4.46.2 Set up New Transaction Sources

The seeded transaction sources for sales credit allocation in this release are Oracle Incentive Compensation and Oracle Quoting. You can also set up a custom user defined source by adding it to the CN_LOOKUPS table in the Forms application. To add values to the CN_LOOKUPS table See [Appendix B, "Lookups"](#).

Guidelines

The Transaction Source name must be unique. It cannot be the name of an existing transaction source or an existing credit rule name.

If you delete a transaction source, you cannot view or access any rule associated with it.

4.46.3 Map Source Tables to Transaction Source

This section presents the steps to map source tables to a transaction source. If the transaction source is Oracle Incentive Compensation, this mapping information is used to generate a dynamic PL/SQL package. This package is picked up when you transfer transactions to the Sales Credit Allocation Rules Engine.

To create credit rules and run Sales Credit Allocation, see the *Oracle Incentive Compensation User Guide*, Chapter 13.

To map source tables to a transaction source, perform the following procedure.

Prerequisites

Transaction sources that are not seeded must be added to the CN_LOOKUPS table.

Login

Log in to HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Source Table Mapping

Steps

1. Query for a user name.
2. Select a transaction source.

In this release, Oracle Incentive Compensation and Oracle Quoting are the only seeded selections.
3. Click **Apply**.

The page is refreshed and displays previously defined attributes.
4. To add a new attribute, enter a name in the User Name column next to the first available destination name (for example, ATTRIBUTE51).
5. Enter a value set name if an attribute has been assigned a valueset.

See Valueset documentation for more information.
6. Select a data type: Alphanumeric, Date, or Numeric. See Guidelines.
7. If the transaction source is Oracle Incentive Compensation, select a source.

8. To set up the rule attribute for use by a credit rule condition, check the Enable box.
9. Click **Update** to save your changes.
10. If you are using Oracle Incentive Compensation as a transaction source, click **Generate**.

Guidelines

The data type of the credit rule attribute must match the data type of the transaction attribute column value or rules engine processing will fail. For example, if the data type in the rule attribute is Numeric, the credit rule condition is Between 100,000 and 200,000, and the transaction attribute value is ABC, the rules engine will reject the transaction, because ABC is not numeric data.

4.46.4 Set up Workflow Options

During credit allocation processing, the credit rules engine checks whether the total output revenue allocation percentage is equal to 100%. If the total revenue allocation percentage is not equal to 100%, then the status of the transaction is updated to "REV NOT 100".

These transactions are processed by Workflow based on a system profile value. You can set how you want to handle transactions that are not able to be processed normally.

There are three options provided with the Sales Credit Allocation module.

- **Even Distribution:** The remaining revenue percentage is distributed evenly among the existing sales roles.
- **Weighted Average:** The remaining revenue percentage is distributed based on the weighted average.
- **Custom:** You can add custom code if none of the seeded choices suits your business requirements. You can use the Custom option to set up for the Workflow process to not process the transaction.

For example, the allocation percentages for a transaction are 60% to Role 1, 20% to Role 2, and 20% to Role 3. However, during transaction processing, only two roles are associated with the credit rule. What is to become of the remaining 20%?

Using Even Distribution, each of the two roles receives 10% credit, or half of the remaining 20% credit. Using the Weighted Average, The first role gets 15% and the second receives 5% of the sales credit, because 60% represents three times the 20%

of the second role. Each of the resources assigned to the roles that resulted in revenue output receives additional credit.

The option is set in the system profile *Total Rev % Not 100*. If you do not set the value at the application level, it defaults to the site level. If no selection is made, the Workflow process fails. See [Appendix C, "System Profile Options"](#) for steps to set up this profile.

You can use Workflow configuration to decide what should happen after Rules Engine processing is complete. If you have a PL/SQL package that copies the transactions from output interface tables to your own schema, you can configure the workflow process to perform this task.

- For a transaction source of Oracle Incentive Compensation or Oracle Quoting, you can call a PL/SQL program.
- For other transaction sources, you can call a Java program.

4.46.5 Set Up Workflow Background Process

In order for Workflow to run for the processes in section 4.46.4, you must set up the background process for it. This setup schedules when Workflow checks the queue.

For Sales Credit Allocation, it is recommended that you set up the Workflow background process parameters to run periodically. You should set up start and end dates which encompass the full span of time for which you want the process to run.

After the setup is complete, you can log in to Self Service Web Applications (SSWA) to view the Workflow Administrator Activities List. See [Section 4.46.5.2, "View Workflow Background Process Results"](#).

4.46.5.1 Set Up the Process

To set up the Workflow background process and view Workflow activity, perform the following steps.

Prerequisites

Login

Log in to Oracle Forms.

Responsibility

System Administrator

Navigation

Requests > Find Requests

Steps

1. On the Find Requests screen, select All My Requests, and Order By Request ID.
2. Click **Submit a New Request**.
3. Select Single Request and click **OK**.
4. In the Parameters screen, select an item type of Sales Credit Allocation Process. Click **OK**.
5. On the Schedule screen, select Periodically.
6. Enter a start date and end date.
The dates should encompass the time span for which you want to run the background process. A year is a good standard span.
7. Set the process to run periodically.
8. Set the process to apply the interval from the start of the prior run.
9. Click **OK**. The background process setup is now complete.

4.46.5.2 View Workflow Background Process Results

To view the results of the Workflow background process, log in to Self Service Web Applications.

1. Select Workflow Administrator Web Applications from the Self Service list.
2. Click **Find Processes**.
3. On the Find Processes screen, you can select which activities to view. If you select the Any Status button, active and complete Workflow activities will be displayed. You can select Active or Complete to limit the display.
4. Select All from the Item Type drop-down list to show all data, as defined by the radio buttons in step 3.
5. You can further narrow the Find process by entering information in the four fields that follow:

- Item Key
 - User Key
 - Process Name
 - Process Owner
6. You can limit the displayed activities by selecting Suspended or In Error, or select Any Status to show all activities that match the parameters previously set.
 7. Click **Find**.
 8. In the Item Type field, select Sales Credit Allocation Process from the drop-down list.
 9. Click **Find**.
The Process List appears.
 10. To view details about a process, click the link in the Process Name field.
The Notifications List appears.
 11. Click View Diagram to see the Activities List queue.

4.46.6 Set up Personalization Links

You can personalize OA pages to make them work better for your enterprise. Personalization is useful for:

- Hiding or showing a field
- Changing the prompt for a field or other text
- Reordering fields or items
- Adding new buttons, links, text items, or images
- Restricting query results in a table
- Restricting data that a user can access

Before you can personalize an OA page, you must set up personalization links. See the Oracle Applications Framework Developers Guide or the OA Framework Personalization and Extensibility Guide for more specific information.

4.46.7 Create Credit Rule Hierarchy

The credit rule hierarchy serves as a mechanism for you to maintain and link credit rules in a logical way. Create the necessary rule hierarchy for each transaction that implements Sales Credit Allocation business logic.

A credit rule definition consists of the following:

- Name
- Description
- Date Effectivity
- Operating Unit (ORG_ID)
- Rank
- Parent Rule
- Transaction Source

Credit Rule Conditions are used to determine whether a credit rule should be used or not. Each credit rule has the following definition:

- Attributes
 - * Source Transaction Column Name
 - * User Defined Column Name
 - * Data Type
 - * Value Set
 - * Transaction Source
- Operator
- Values

Allocation percentages indicate how much revenue credit and non-revenue credit is given to each sales resource associated with a role.

- Revenue
- Non-revenue
- Split or not split
- Effective dates

4.46.8 Synchronize the Credit Rules

Any time you make changes to one or more rules, you must synchronize the rules in the Credit Rule hierarchy. This procedure ensures that when transactions are sent to the Credit Rules Engine they are processed based on the most recent rule conditions. For example, changes to the rank of a rule, or the allocation percentage of a rule must be up to date to deliver the desired results.

To synchronize the rules hierarchy, perform the following procedure.

Prerequisites

The Transaction Source must be mapped. The Credit Rule hierarchy must be created.

Login

Log in to HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Navigation

Requests > Allocation Process > Submit Request

Steps

1. Select **Synchronize Credit Rules** from the Request Type drop-down list.
2. Select the transaction source from the Transaction Source drop-down list.
3. Click **Submit Request**.
A pop-up box appears. Click OK to proceed with the credit rule synchronization.
4. The process information at the bottom of the page displays a Phase of *Pending*. Click **Refresh Data** periodically until the Phase displays *Completed*.
5. Click the Process Log icon to see the Process Log.

4.46.9 Matching Credit Rule Attributes to Data Types

The data type of the credit rule attribute must match the data type of the transaction attribute column value or rules engine processing will fail. For example, if the data type in the rule attribute is Numeric, the credit rule condition is Between 100,000 and 200,000, and the transaction attribute value is ABC, the rules engine will reject the transaction, because ABC is not numeric data.

When the rules engine processes transactions in bulk, the log does not list the specific transactions that caused the failure.

4.47 Define Payment Plans

Payment plans are optional and are used to set up advance or deferred payments (sometimes referred to as draws). Use payment plans to set rules governing how, when, and how much is paid and at what frequency.

You can set up a minimum and a maximum amount to be paid to a resource. You can set amounts paid for a minimum to be recoverable (paid back by the resource) or non-recoverable (the resource does not have to pay them back). For maximum settings, you can set whether you want to pay commission earned above the maximum to the resource at a later time.

You can set up the recovery schedule independently of the earnings for the period. For example, you can set the payment interval to Period (monthly) and the recovery schedule to Quarter.

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

Prerequisites

Credit types must be defined.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Payment Plan

Steps

1. In the Name column, assign a unique name to the payment plan.
2. Enter a start date and an end date.
3. Select a payment group.
The default setting is Standard.
4. Select a credit type
Functional Currency is the default, but you can select other, previously defined credit types.
5. Select a payment interval.
Period is the default, but you can select any previously defined payment interval from the list.
6. You can establish a minimum amount to be paid at the end of each pay interval. Check the box in the Recoverable column if you want the amount to be recovered from later earnings.
7. You can establish a maximum amount that can be paid for any pay interval. If you check the box in the Pay Later column, any amounts over the maximum to be paid are rolled over and paid in future periods.
8. Select a recovery interval.
The default setting is Period. Based on the recovery interval, the 'true-up' of payments against commissions occurs at the end of the interval assigned. See Guidelines for an example.
9. Check the Pay Against Commission box if you want the payment plan to apply its rules using earnings that have been collected during the pay period interval. If you leave the box unchecked, the application calculates recovery at the end of the recovery interval. See [Section 4.47.1, "Pay Against Commissions Check Box"](#).
10. Click **Update** to save the payment plan. If necessary, click **Restore** to return to the previously saved information
After the payment plan is created, you can assign it to a resource (see [Section 4.49, "Assign Payment Plans"](#)).

Guidelines

Recovery is based on the recovery interval. For example, the Pay Against Commission box is not checked, the payment interval is Period, and the Recovery interval is Quarter. The quarters are Jan-Mar, Apr-Jun, Jul-Sep, and Oct-Dec. If a resource has a payment plan that is valid from February to May, recovery occurs in March. In June, at the end of the quarter, there is no recovery, because the payment plan is no longer in effect. The resource is paid all earnings. For more details, see [Section 4.47.1, "Pay Against Commissions Check Box"](#).

4.47.1 Pay Against Commissions Check Box

This example shows the difference between what happens if you check the Pay Against Commission box and if you don't check the box.

If you check the Pay Against Commission box, any amounts used to meet a resource's minimum or maximum payment amount are recovered at the end of each payment interval period. For example, a resource has a payment plan that has a \$200 minimum and a \$300 maximum per payment interval period (the period can be month, quarter, or year). The resource earns \$150 commission for the payment interval period. At the end of the period, the resource is paid \$200, the minimum, but owes \$50 to the company if the Recoverable box is checked. The next period, the resource earns \$400. In this case, the resource receives a payment of \$300. If the Recoverable box is checked, \$50 goes to repay the payment plan for the amount advanced to meet the minimum payment in the previous period. If the Pay Later box is checked, the resource receives the remaining \$50 later. Regardless if the resource earns below the minimum or above the maximum, any discrepancies are resolved at the end of each payment interval period.

If you don't check the Pay Against Commissions box, any payment adjustments are made at the end of the recovery interval, which you can set to be different from the pay interval period. The pay interval period can be month, quarter, or year. The resource receives the minimum amount for each period, but can receive a higher amount, up to the maximum, during the final period of the recovery interval, when the minimum and maximum payments are tried-up against the commissions earned.

Two scenarios can occur at the end of the recovery period: the resource has earned less than the minimum or more than the maximum. These scenarios are explained below. For these examples, the Pay Against Commission box is unchecked, the Pay Interval Period is Period, the Recovery Interval is Quarter, the Minimum payment per period is \$200 and the maximum is \$300. The transactions used in the example are displayed in the following table.

Table 4-1

Month	Earnings	Payment Plan	Payment Plan Recovery	Total Payment
Jan-03	\$180	\$200	NA	\$200
Feb-03	210	200	NA	200
Mar-03	150	60	-400	200
Apr-03	1000	200	NA	200
May-03	0	200	NA	200
Jun-03	1000	-1,240	-460	300
Jul-03	1000	200	NA	200

For January and February, the resource earns a little less and a little more than the \$200 minimum, and receives the minimum payment of \$200. No recovery occurs until March, when the resource receives the minimum \$200 payment, and the payment plan advances \$60 to cover the difference between the \$600 paid out and the \$540 of total commissions earned. Because the Recoverable box is checked, this \$60 due from the resource is carried over to the second quarter. If the Recoverable box was not checked, no amount would carry over.

During the second quarter, the resource earns commissions above the maximum in April and June but no commissions in May. The payment plan pays out the minimum of \$200 for April and May. When recovery occurs in June, the payment plan pays the maximum of \$300 to the resource because earnings for the quarter were above the minimum of \$600. The payment plan recovery takes back \$200 for April and \$200 for May, plus the \$60 remaining from the first quarter, for a total of \$460. The Payment Plan column amount of -1,240 represents the resource's second quarter total earnings (\$2,000) less the amount of payments (\$700), less the \$60 that is recovered from the first quarter. If the Pay Later box is checked, the \$1,240 is paid out later to the resource.

July starts a new quarter, so it is treated exactly the same as April.

4.47.2 Setting Up Payment Group Codes

The Payment Group setting enables you to assign multiple payment plans to a resource as long as they are in different payment groups for a specific date range. The payment group codes are customizable; the default setting is Standard.

To set up payment group codes perform the following procedure in the Forms application.

Login

Log in to Oracle Forms.

Responsibility

Incentive Compensation Developer

Navigation

Navigator > Lookups

Steps

1. Query the Lookup Type PAYMENT_GROUP_CODE.
2. Create the lookups you need for your business requirements.
3. Save.
4. Bounce the HTML server.

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

4.48 Assign Pay Groups

A **pay group** defines the length of eligibility and frequency of payments, such as monthly or semi-monthly, for the resources who are assigned to the pay group. A resource must be assigned to a pay group to receive compensation.

In previous releases of Oracle Incentive Compensation, pay group assignment could only be done for an individual resource. In this release, you can assign a pay group to a role, and every resource who is assigned the role receives the pay group automatically.

4.48.1 Assigning a Pay Group to a Role

In this release, you can assign a pay group to a role, in the same way that a compensation plan is assigned to a role. Resources inherit the pay group when the role is assigned to them. After the pay group is assigned to the role, you can customize the pay group for individual resources, for example, changing the start and end dates.

The steps for assigning a pay group to a role differ from those for assigning a pay group individually to a resource.

You can assign a pay group to a role in two different ways. The first way uses the Pay Group page (Administration > Incentive > Pay Group). This is also the place where pay groups are created, so this way is convenient for assigning a newly created pay group to a role without having to navigate to another tab. The second way uses the Role page (Resource > Role > Pay Group).

To assign a pay group to a role, perform one of the following two procedures.

4.48.1.1 Procedure 1: Using the Administration Tab to Assign a Pay Group to a Role

Prerequisites

Pay Group must already be defined.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Pay Group

Steps

1. Select a pay group to assign to the role.
2. Click **Apply**.
3. Scroll to the right and click **Details** in the details column for the row in which the selected pay group is displayed.
The Pay Group Details page appears.
4. Select a view of Role Assignments.
5. Click **Apply**.

The Pay Group Details page appears.

6. In the Role Name column, select a the role to which you want to assign the pay group.
7. Enter a start date and an end date.
8. If you need to remove a role, check the Remove box. (See Guidelines)
9. When you have finished entering the role or roles, click **Update** to save your changes and remove any roles that have the Remove box checked.

Guidelines

You must enter a valid start date and end date for the assignment of a pay group to a role. An error message displays if the dates are not valid. A role cannot have more than one pay group assigned at a time.

In order to preserve the pay group assignment for a resource when their role is deleted from a pay group assignment, a Lock box has been added to the Assign Pay Groups page (Resource > Resources > Pay Groups). This feature can be used to prevent individual resources assigned to a pay group from leaving their pay group, even if the other resources assigned to a role are assigned to a new pay group. The Lock box also prevents manual updates to the resource's pay group.

4.48.1.2 Procedure 2: Using the Resource Tab to Assign a Pay Group to a Role

In order to enable assignment of a pay group to a role on the Resource tab, in this release the Role page incorporates two changes. The first change is a new side panel menu, which offers three selections:

- Compensation Plan: Assign compensation plans to roles
- Payment Plan: Assign payment plans to roles
- Pay Group: Assign pay groups to roles

You must select a role before clicking one of these links in the side panel menu. The Compensation Plan selection is the previous functionality. The Payment Plan and Pay Group selections are new in this release.

Prerequisites

The pay group must be defined in Administration > Incentive > Pay Group.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Resource > Role > Pay Group

Steps

1. Query for a role.
2. In the side panel menu, click **Pay Group**.
The Pay Group Assignment to Role page appears. Any pay groups that are already assigned to the role are displayed. You can click the hyperlink in the Pay Group column to view pay group details.
3. In the first blank field in the Pay Group column, query for the pay group that you want to assign to the role.
4. Enter a start date and an end date.
5. Click **Update**.

4.48.2 Assigning a Pay Group to a Resource

Assigning a pay group to a role can be very efficient, but sometimes you want to assign a pay group individually to a resource, or customize a pay group that was assigned to the resource's role. You can still perform individual pay group assignment in this release. To do so, 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager

Navigation

Resource > Resources > Pay Groups

Steps

1. Query for a pay group.
2. Enter a start date and an end date.
3. 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.

4.49 Assign Payment Plans

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

In this release of Oracle Incentive Compensation, you can assign payment plans at the role level, so that all of the resources to whom the role is assigned receive the same payment plan at the same time. Previously, you could only assign payment plans at the resource level. If large numbers of resources were assigned payment plans, it could take a long time and introduce the possibility of human error during the data entry process.

You must decide which method of assigning payment plans works best for your organization. However, even if you decide to assign payment plans in mass at the role level, you can still assign and modify payment plans for individual resources as needed.

You can lock a payment plan assignment at the resource level to prevent it from being deleted if the payment plan assignment is changed subsequently at the role level.

4.49.1 Assigning a Payment Plan to a Role

For speed and efficiency, you can assign a payment plan to a role. The resources who are assigned the role receive the payment plan automatically. A payment plan is assigned to the sales role with specific dates.

You can customize the payment plan for an individual resource for settings such as minimums, maximums, and start and end dates.

You can assign a payment plan to a role in two different ways. The first way uses the Payment Plans page (Administration > Incentive > Payment Plan). This is also the place where payment plans are created, so this way is convenient for assigning a newly created payment plan to a role without having to navigate to another tab. The second way uses the Role page (Resource > Role > Payment Plan).

To assign a payment plan to a role, perform one of the following two procedures.

4.49.1.1 Procedure 1: Using the Administration Tab to Assign a Payment Plan to a Role

Prerequisites

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

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Administration > Incentive > Payment Plan

Steps

1. Select the payment plan that you want to assign to the role.

If the payment plan is not visible on the Payment Plans page, use the search field at the top of the page.

2. On the Payment Plans page, scroll all the way to the right. In the row in which your selected payment plan is listed, click **Details** in the Assignment Details column.

The Payment Plan Details Assignment page appears.

3. The payment plan name is displayed in the Name field. You can click this hyperlink to return to the Payment Plans summary page.

4. Select a view:

- Role Assignments: Displays the roles assigned and provides empty fields to assign the payment plan to a new role.
- Resource Assignment: Displays the resources assigned to the payment plan, along with their role, start date, and end date.

5. To assign a payment plan to a role, select Role Assignments in step 4 and click **Apply**.

The role assignment view appears.

6. In the first blank field in the Role Name column, enter the role to which you want to assign the payment plan.

7. Enter a start date and an end date.

8. Click **Update**.

4.49.1.2 Procedure 2: Using the Resource Tab to Assign a Payment Plan to a Role

In order to enable assignment of a payment plan to a role on the Resource tab, in this release the Role page incorporates two changes. The first change is a new side panel menu, which offers three selections:

- Compensation Plan: Assign compensation plans to roles
- Payment Plan: Assign payment plans to roles
- Pay Group: Assign pay groups to roles

You must select a role before clicking one of these links in the side panel menu. The Compensation Plan selection is previous functionality. The Payment Plan and Pay Group selections are new in this release.

Prerequisites

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

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Navigation

Resource > Role > Payment Plan

Steps

1. Query for a role.
2. In the side panel menu, click **Payment Plan**.

The Payment Plan Assignment to Role page appears. Any payment plans that are already assigned to the role are displayed. You can click the hyperlink in the Payment Plan column to view payment plan details.

3. In the first blank field in the Payment Plan column, query for the payment plan that you want to assign to the role.

4. Enter a start date and an end date.
5. Click **Update**.

4.49.2 Assigning a Payment Plan to a Resource

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

Prerequisites

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

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager

Navigation

Resource > Resources > Payment Plans

Steps

1. Query for a resource.
2. On the Assign Payment Plans page, review the resource's payment plan information.
3. To assign a new payment plan, enter it in the Name column of the first blank row.
4. Enter a start date and an end date.
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. Click **Update**.

4.50 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 - Compensation Plans page.

From this page you can access the revised Plan Element Details page. There are two functions of this page:

- Assign and distribute variables (Target, Performance Goal, and Fixed Amount). See Guidelines.
- Assign payees

The Resource Details - Distribute Variables page contains additional context information in this release, including Resource Name, Compensation Plan, and Target.

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

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager

Navigation

Resource > Resources

Steps

1. Query for a resource.
2. Click Compensation Plan in the side panel menu.
The Resource Detail: Compensation Plans page appears.
3. Select the resource's role in the Role Name list of values.
4. Click **Apply**.
The Compensation Plan area is populated with data.
5. In the Compensation Plan area, click the Name link to display the plan elements.
The Plan Elements area lists the name as well as basic information about the plan elements.
6. Check the 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 Flag** 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 box, the contents of the customized plan element are not affected by any changes you make to the plan element at the role level.
7. Click the plan element name in the Quota Name column.
The Plan Element Details page appears.
8. The Plan Element Details page displays seven fields of read only information at the top relating to the resource.
 - Resource Name
 - Compensation Plan
 - Name (of plan element)
 - Description (of plan element)
 - Quota Group: Quota or Bonus
 - Start Date
 - End Date

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

9. The Parameters area lists five read-only 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
 - Choose Formula: The name of the formula if the formula type is Formula.
 - Eligible for Payee Assignment (Yes or No). If Yes is displayed, the Payee block appears below the Variables section.
10. Add or revise variables for a resource in the Variables area.
11. To add together the amounts from all revenue classes, check the Sum amounts from Revenue Classes box.
12. 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 Plan Element Details - Distribute Variables page.
13. 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.
14. Click **Apply**.
15. To distribute variables, click **Distribute Target**.

The amounts are equally distributed to each period, duplicating the amount set in the Variables area of the Resource Details - Plan Element Details page.
16. If the plan element is eligible for payee assignment, enter a payee name in the Name field of the Payee area.
17. Enter a start date and an end date. Click the calendar icon to open the date picker.
18. Click **Update** to save additions and changes to the payee assignment.
19. Click **Update** to save any changes you made on the Plan Element Details page.
20. If you want to customize the commission rates on a rate table for a resource, click the Rate Tables link on the side panel menu. **Note:** Make sure the Customized Flag box is checked on the Compensation Plans page (see step 6 above).

The Plan Element Details - Rate Tables page appears.

21. Click the Details Link.

The Rate Table Detail - Commission Rates page appears.

22. Make changes to the commission rates as needed.
23. Click **Update**.

Guidelines

Target is the specific amount set for resources as their attainment amount. Resources have views of this figure through their contract. To access the target amount when creating expressions for a formula, you must add the amount from the TARGET column of the CN_QUOTAS table. If a plan element for a resource is customized, then you must use the TARGET column from the CN_SRP_QUOTA_ASSIGNS table instead.

The most common way that a target is used in an expression is for evaluating transactions as a percentage of quota. The expression typically looks like this:

TRANSACTION_AMOUNT/TARGET

This expression gives you the percentage of quota a particular transaction yields.

Goal is the amount that management sets as the actual goal expected of the resources. This amount is typically used for reporting purposes and is not exposed to the resources. To access this amount when creating expressions, use the PERFORMANCE_GOAL column from the CN_QUOTAS or CN_SRP_QUOTA_ASSIGNS table.

Fixed Amount is a constant amount that is used for calculation purposes. Resources do not have a view or access to the fixed amount. To access the fixed amount when creating expressions, use the PAYMENT_AMOUNT column from the CN_QUOTAS or CN_SRP_QUOTA_ASSIGNS table.

By entering the achievement levels at the plan element level, you create a generic plan. All resources assigned the compensation plan receive this quota figure.

4.51 Reports

This section presents information on the Incentive Planning and Compensation reports available in this release of Oracle Incentive Compensation. At the end of the section are tables that show which responsibilities have access to which reports ([Section 4.51.20, "Report Access by Responsibility"](#)) and the availability of reports

from release to release ([Section 4.51.21, "Road Map of Reports from Release to Release"](#)).

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 4.51.1, "Quota Modeling Summary"](#)
- [Section 4.51.2, "Average Quota Report"](#)
- [Section 4.51.3, "Quota Overassignment Report"](#)
- [Section 4.51.4, "Quota Range Report"](#)
- [Section 4.51.5, "Compensation Contract Status"](#)
- [Section 4.51.6, "Overlay Report"](#)
- [Section 4.51.7, "Vacancy Report"](#)
- [Section 4.51.8, "Transition Report"](#)
- [Section 4.51.9, "Plan Activation Status Report"](#)
- [Section 4.51.10, "Role to Compensation Plan Mapping Report"](#)

Compensation Reports

In this release, Oracle Incentive Compensation provides nine Compensation Reports. To use the new Commission Statement report, navigate to the Transaction tab and click the Commission Statement subtab (see [Report Enhancements in this Release](#)). To use the other eight reports, click the Reports link and select the appropriate report name on the Summary of Compensation Reports page.

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 4.51.11, "Year to Date Summary"](#)
- [Section 4.51.12, "Transaction Details"](#)
- [Section 4.51.13, "Compensation Group Hierarchy"](#)
- [Section 4.51.14, "Classification Rules Report"](#)
- [Section 4.51.15, "Commission Summary Report"](#)
- [Section 4.51.16, "Quota Performance"](#)
- [Section 4.51.17, "Earnings Statement Report"](#)
- [Section 4.51.18, "Unprocessed Transactions"](#)
- [Section 4.51.19, "Commission Statement Report"](#)

Report Enhancements in this Release

A new Commission Statement report is designed for ease of use by resources. It displays a balance summary, commission summary, a graph of commissions, bonuses and adjustments, and details for each of the three commission types. The previous Commission Statement is still available and has been renamed the Earnings Statement report.

In this release, managers can now use Oracle Field Sales or the Sales Force User responsibility in Oracle Incentive Compensation to access the reports of any resource that is in their hierarchy. Four hierarchies are defined for reporting:

- Sales and Telesales
- Sales Compensation
- Sales Force Planning
- Compensation Reporting Hierarchy (new)

Two new Discoverer workbooks are added to the eight seeded Discoverer workbooks in this release.

4.51.1 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 overassignment 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Quota Model Summary

4.51.2 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. Overlay salespeople are not given revenue sales credit and are not part of an overassignment of quota. 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Average Quota Summary

4.51.3 Quota Overassignment Report

The Quota Overassignment report shows in one report the over assignment value and percentage effect on the immediate level of resources (directs) and the street level resources. Directs report the manager with no intermediary manager. Street level resources are those at the bottom of the Incentive Planning hierarchy. 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Overassign Quota Summary

4.51.4 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Quota Range Summary

4.51.5 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.

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.

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

4.51.6 Overlay Report

The Overlay report lists all overlay resources, if any, who are members of the compensation group and groups below this group. Overlay resources do not receive revenue sales credit and are not part of any overassignment of quota by a manager. This report is a concise display of overlay resources as distinct from previous reports where both overlay and nonoverlay resources are displayed together.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Overlay Summary

4.51.7 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Vacancy Summary

4.51.8 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Transitional Salespeople

4.51.9 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Plan Status

4.51.10 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Planning Analyst

Incentive Planning Contract Approver

Incentive Planning Finance Manager

Incentive Planning Sales Manager (direct reports only)

Navigation

Quota > Report > Role to Compensation Plan Mapping

4.51.11 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 in Oracle Incentive Compensation by the Incentive Compensation Payment and Incentive Compensation Super User responsibilities. In Oracle Field Sales, the Year To Date Summary is accessible by the Manager and Salesperson responsibilities.

The figures are grouped by period and by plan element. The Incentive Compensation Super User controls which plan element appears as a quota or bonus category by checking the Quota Group 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 and payment, 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Navigation

Transaction > Report > Year to Date Summary

4.51.12 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Navigation

Transaction > Report > Transaction Details Report

4.51.13 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Navigation

Transaction > Report > Compensation Group Hierarchy Report

4.51.14 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Navigation

Transaction > Report > Classification Rules Report

4.51.15 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Navigation

Transaction > Report > Commission Summary

Steps

1. Select an Analyst. The default is All.
2. Select a period.
3. Select Functional Currency in the Credit Type field.
4. Select a Reporting Currency.
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 the 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.

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, "System Profile Options"](#) for more specific information.

4.51.16 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.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Navigation

Transaction > Report > Quota Performance

4.51.17 Earnings Statement Report

The Earnings Statement report gives you a complete look at all of the transactions for a resource for a selected period. The columns on the report are the parameters that you selected in the parameters modification page, which is also called Earnings Statement Report.

This report must include the Transaction Amount column, the only required field. Any other columns are optional, so you can configure the report to display exactly the information that you need. The report can be modified easily by returning to the Earnings Statement Report modification page and changing the parameters.

Note: The Earnings Statement report was called the Commission Statement report in previous releases. You can access a new, expanded Commission Statement report by navigating to Transaction > Commission Statement, or on the Compensation tab of Oracle Field Sales.

Prerequisites

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

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Oracle Field Sales Manager

Oracle Field Sales Salesperson

Navigation

Transaction > Report > Earnings Statement

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

Steps

1. Select a period type of Period, Quarter, or Year.
2. Select a period.
3. In the Plan Element field, make a selection. The default setting is All.
4. Select a Reporting Currency.
5. Click **Apply** to display the report.

Guidelines

The Earnings Statement Report is a seeded saved report. If you change the display options and then attempt to save the report with the default name Earnings Statement Report, an error message displays. If you want to save the report with different query or display parameters, you must give it a new name.

After the report is displayed, you can drill down on an amount in the Invoice Number column to display the Invoice Detail page. **Note:** You must set the Enable Earnings Statement Drilldown profile to YES at the site level and Application level for this drilldown to work correctly.

Click the amount in the Order Number column to display the Order Detail page. **Note:** As with the Invoice Detail page, you must set the Enable Commission Statement Drilldown profile to YES at the site level and Application level for this drilldown to work correctly.

4.51.18 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 4.51.22, "Configuring Reports"](#).

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Navigation

Transaction > Report > Unprocessed Transactions

4.51.19 Commission Statement Report

The new Commission Statement report is designed to be easily understood by resources. It includes a Balance Summary that shows balances, earnings, recoverable and nonrecoverable amounts, payment due and ending balance. In the Commission Summary section a resource can select details for commission, bonus, or payment adjustments. This section also includes a graph.

The Commission Statement Report from the previous release remains, but is renamed the Earnings Statement Report.

You can access the Commission Statement report in Oracle Incentive Compensation on the Transaction tab or on the Compensation tab in Oracle Field Sales.

This new report displays a Balance Summary, Commission Summary, and details for each plan element for three categories: Commission, Bonus, and Payment Adjustments. The Commission Summary area includes a graph and you can select which category for which you want to view details.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Incentive Compensation Analyst

Incentive Compensation Payment

Incentive Compensation Reports

Sales Force User

Oracle Field Sales Manager

Oracle Field Sales User

Navigation

Transaction > Commission Statement

Note: For Oracle Field Sales Managers, the Salesperson Name in the list of values displays the manager plus all subordinates in the hierarchy. For salespersons, no list of values is used, but the Salesperson Name value defaults to the logged-in user. For Oracle Incentive Compensation Analysts, all available salespersons are displayed.

4.51.20 Report Access by Responsibility

The headings list eight Incentive Compensation report users. A Yes indicates that the report is accessible with the corresponding default responsibility; a No indicates that it is not. The Incentive Compensation Developer responsibility does not have access to reports.

A new responsibility, Sales Force User, has been created to enable resources to view four reports without access to Oracle Field Sales. The reports that they can view are:

- Year to Date Summary
- Quota Performance
- Commission Statement (new)
- Earnings Statement (formerly Commission Statement)

	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

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
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
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

	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
Commission Summary	No	No	No	No	Yes	Yes	Yes	Yes
Quota Performance	No	No	No	No	Yes	Yes	Yes	Yes
Earnings Statement	No	No	No	No	Yes	Yes	Yes	Yes
Unprocessed Transactions	No	No	No	No	Yes	Yes	Yes	Yes
Commission Statement	No	No	No	No	Yes	Yes	Yes	Yes

4.51.21 Road Map of Reports from Release to Release

Release	3i	11.5.3	11.5.4	11.5.5	11.5.6*	11.5.8*	11.5.10	Notes
Yes means Report is available	-	-	-	-	-	-	-	*11.5.7 reports are the same as 11.5.6. 11.5.9 reports are the same as 11.5.8.
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.
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.

Reports

Release	3i	11.5.3	11.5.4	11.5.5	11.5.6*	11.5.8*	11.5.10	Notes
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	Now located under the Resource tab when you query a resource.
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
Year to Date Summary	No	Yes	Yes	Yes	Yes	Yes	Yes	Replaced Oracle Reports 6i Compensation Summary, Compensation Details, Compensation Details (Fiscal View) in 11.5.4. Revised in 11.5.10.
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

Release	3i	11.5.3	11.5.4	11.5.5	11.5.6*	11.5.8*	11.5.10	Notes
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	In 11.5.10 old Commission Statement renamed Earnings Statement and all-new Commission Statement introduced.
Earnings Statement	No	No	No	No	No	No	Yes	Known as Commission Statement until 11.5.10.
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
Top/Bottom Performers	No	Yes	No	No	No	No	No	Oracle Reports 6i report decommissioned after 11.5.3. Now found on Oracle Field Sales home page bin.

Release	3i	11.5.3	11.5.4	11.5.5	11.5.6*	11.5.8*	11.5.10	Notes
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

4.51.22 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.

Login

Log in to Oracle Forms.

Responsibility

System Administrator

Navigation

Navigator > File

Steps

1. Select Application Developer Common Modules. Click **OK**.
The Navigator - Application Developer Common Modules screen appears.
2. Double-click **Define Regions**.
The Regions screen appears.
3. 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.
4. Click the Region Items button in the lower right corner.
The Region Items screen appears.
5. Scroll over to the Long Label field and enter a descriptive name for the attribute.
6. Click **Save**.
This process changes the label name.
7. Bounce the Middle Tier server.

Hiding or Displaying Columns

These steps apply only to the Transaction Details, Commission Statement, and Unprocessed Transactions reports.

Login

Log in to Oracle Forms.

Responsibility

System Administrator

Navigation

Navigator > File

Steps

1. Select Application Developer Common Modules. Click **OK**.
The Navigator - Application Developer Common Modules screen appears.
2. Double-click **Define Regions**.
The Regions screen appears.
3. 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.
4. Click the Region Items button in the lower right corner.
The Region Items screen appears.
5. Find the Attribute or Column name in the list and then select the Node Display box to show the column or deselect the Node Display box to hide the column.
6. If you are setting a column to show, scroll over to the V Align column and select **Top** from the List of Values.

7. Scroll over to the Long Label field and enter a descriptive name for the attribute.
8. Click **Save**.
9. 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
Commission Statement Report	CN1152_COMMISSION	Adjustments Report	cnCommStatRepRun.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

Report	Region ID	Region Name	jsp Name
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

4.51.23 Discoverer Reports

Oracle Discover is an ad hoc query, reporting, analysis, and web publishing tool, which is tightly integrated with Oracle E-Business Suite Release 11i. As a key component of Oracle *9i* it is useful in Oracle Incentive Compensation for creating, modifying, and executing ad hoc queries and reports.

Ten predefined Discoverer workbooks are provided in this release. Two reports are new:

- Contract Status report: Extracts Incentive Planning contract status information
- Transaction Status report: Allows analysts to find transactions in a specific status

To install Discoverer, refer to the Oracle Discoverer End User Layer notes on MetaLink.

These are the seeded Discover reports:

- Calculation Batch Process Report
- Compensation Plan Revenue Class Mapping
- Resources Not Validated for Calculation
- Resources with Pay Group Assignment Different than Compensation Plan Dates
- Earnings Statement Report
- Transaction Details Report
- Formula Definitions
- Resource Assignments Overview
- Contract Status Report

- Transaction Status Report

For more details on these reports, see the *Oracle Incentive Compensation User Guide*, Chapter 11 *Reports*.

4.52 Verify the Implementation

Verification of the implementation can be done by confirming the minimum setups required to activate the Oracle Incentive Compensation application and allow users to begin entering setups and data.

4.52.1 Verify Profile Options

Login

Log in to Oracle Forms.

Responsibility

System Administrator

Navigation

(Forms) Profile > System

Steps

1. Check the 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 [Appendix C, "System Profile Options"](#) for a listing of system profiles.

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

4.52.2 Verify System Parameters

Login

Log in to Oracle HTML Applications.

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.

4.52.3 Verify GL Calendar: Period Types

Use this form to verify your accounting period types.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Navigation

Administration > General > Calendar Type

Steps

See Period Type (in Setup Chapter) of the *Oracle General Ledger User Guide Release 11i* for this procedure.

Example

Period Type	Periods Per Year	Year Type
Month	12	Calendar
Quarter	4	Fiscal
Year	1	Fiscal
Month	12	Fiscal

4.52.4 Verify Accumulation Periods

Verify 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.

Login

Log in to Oracle HTML Applications.

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
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 12.7 Accumulation Periods.

4.52.5 Verify Interval Numbers

Use this procedure to verify Interval Numbers. Note in the examples below how the interval numbers vary depending on whether they are set by Period, Quarter, or Year. If they are by Period, each interval number is unique. If they are set by quarter, the number is the same for each period in a given quarter. If the interval numbers are set by year, they are the same for all periods in the year.

See *Oracle Incentive Compensation User Guide* Section 12.9.1 To View an Interval Type.

Login

Log in to Oracle HTML Applications.

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

Period Name	Start Date	End Date	Year	Interval Number
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
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

4.52.6 Verify User Name Assignment to Tables

Verify the user names for tables depending on desired usage.

See *Oracle Incentive Compensation User Guide* Section 12.5 Tables.

Login

Log in to Oracle HTML Applications.

Responsibility

Incentive Compensation Super User

Navigation

Administration > Tables

Example

Schema	Name	User Name	Alias	Description	Usage
CN	CN_COMMISSION_HEADERS	CN_COMMISSION_HEADERS	CH	NA	Calculation
CN	CN_COMMISSION_LINES	CN_COMMISSION_LINES	CL	NA	Calculation
CN	CN_SRP_PERIOD_QUOTAS	CN_SRP_PERIOD_QUOTAS	CSPQ	NA	Calculation
CN	CN_SRP_QUOTA_ASSIGNS	CN_SRP_QUOTA_ASSIGNS	CSQA	NA	Calculation

4.52.7 Verify Table Column Settings

Verify the column settings for tables.

See *Oracle Incentive Compensation User Guide* Section 12.5.1 Columns.

Logon

Log in to Oracle HTML Applications

Responsibility

Incentive Compensation Super User

Navigation

Administration > Tables > Columns

4.52.8 Verify Report Configuration

See: *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.

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:

Flexfields	Code
*CN Commission Headers	CN_COMMISSION_HEADERS_ALL
*CN Compensation Plans	CN_COMP_PLANS_ALL
*CN Quotas	CN_QUOTAS_ALL

The flexfields are enabled in three tables:

- CN Commission Headers
Oracle Incentive Compensation contains 100 numbered attributes that can be customized for use with classification of transactions. These attributes are seeded with the application. 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.

B.1.1 Viewing Lookups

To view existing lookups, perform the following procedure.

Prerequisites

Log in as the Incentive Compensation Developer responsibility in the Forms version of the application.

Steps

1. In the Navigator - Incentive Compensation Developer window, double-click **Lookups**.

The Oracle Sales Compensation Lookups window appears.

2. Press the F11 key to query for Oracle Sales Compensation.
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.

B.1.2 Editing a Lookup

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 box is automatically selected. Change these as needed.
5. Save your work.

B.1.3 Creating a Lookup

To create a new lookup, perform the following:

Steps

1. In the Navigator - Incentive Compensation Developer window, double-click **Lookups**.

The Oracle Sales Compensation Lookups window appears.

2. Select Oracle Incentive Compensation from the Application field.
3. Enter a name in the Type field. Use all caps with underscores between words.
4. Enter a user name in the User Name field.
5. You can enter a description.
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. Enter effective dates.
8. Check the Enable box if you want the lookup to be operational within the effective date range.

9. Save.

Guidelines

Note: Under the type of PE_OBJECT_TYPE in the table below, the codes START_PERIOD_ID and END_PERIOD_ID are listed. However, starting with the 11i release of Oracle Incentive Compensation, these period_ids are no longer used. Use actual start and end dates instead.

B.1.4 List of Lookups

The following table lists Oracle Incentive Compensation Lookups, including a description, Access Level, and Seeded Values and Meanings.

Lookup Type	Description	Lookup Code and Meaning
ACCESS_CODE	Access Code	UPDATE (Update) VIEW (View)
ACTIVATE_STATUS	Plan Activate Status	CREATED (Created) FAILED (Failed) PUSHED (Activated) UPDATED (Updated)
ADJUSTMENT_REASON	Manual Adjustment Reason	AR_ERROR (Accounts Receivable Processing Error) OE_ERROR (Error During Order Entry) OTHER (Other) SHARED (Commission should be Split)
ADJUSTMENT_STATUS	Manual Adjustment Status	CANCELED (Canceled) POSTED (Posted) REVERSED (Reversed) REVIEW (Review) TRIAL (Trial)

Lookup Type	Description	Lookup Code and Meaning
ADJUST_STATUS	Transaction Adjust Status	DEALASGN (Deal Move) DEALSPLIT (Deal Split) FROZEN (Frozen) INVLOAD (Invoice Captured) MANUAL (Manual) MASSADJ (Move Credits) MASSASGN (Share Credits) ORIGINAL (Original) REVERSAL (Reversal) SPLIT (Splits)
ADVANCED SEARCH	Advanced Search	ADJUSTED_BY (Adjusted By) ADJUST_DATE (Adjust Date) ADJUST_STATUS_DISP (Adjust Status) DIRECT_SALESREP_NAME (Direct Salesperson Name) DIRECT_SALESREP_NUMBER (Direct Salesperson Number) INVOICE_DATE (Invoice Date) INVOICE_NUMBER (Invoice Number) LOAD_STATUS (Load Status) ORDER_DATE (Order Date) ORDER_NUMBER (Order Number) PROCESSED_DATE (Processed Date) QUANTITY (Quantity) REVENUE_TYPE_DISP (Revenue Type) ROLLUP_DATE (Roll Up Date) STATUS_DISP (Calculation Status) TRANSACTION_AMOUNT (Functional Amount) TRX_TYPE_DISP (Transaction Type)
AMS_CUSTOM_SET_OBJECTS	Parent Object for Cue Cards	PLAN_ELEMENT (Plan Element)

Lookup Type	Description	Lookup Code and Meaning
AMS_CUSTOM_SETUP_OBJECTS	Parent Object for Cue Cards	PLAN_ELEMENT (Plan Element) ROLE (Role)
AMS_SYS_ARC_QUALIFIER	AMS System Architecture Qualifier: Cue Card Codes and Meanings	PE_ARC (Revenue Classes) PE_ART (Rate Tables) PE_DTLS (Main) RO_CP (Compensation Plan) RO_PG (Pay Group) RO_PMT (Payment Plan)
ANALYST_NOTE_REASON	Analyst Note Reason	SYSTEM_GENERATED (System Generated) USER_DEFINED (User Defined)
ANC_CALC_METHOD	Anchor Calc Method	LINE_CALC (Line Calculation) STEP_CALC (Step Calculation)
APPL_STATUS	Applicable Status	NA (Not Applicable)
APPLICATION_TYPE	Application Type	AR (Oracle Receivables) CN (Oracle Commissions) and Sales Analysis GL (Oracle General Ledger) OE (Oracle Order Entry) RA (Oracle Revenue Accounting)
APPROVE_REJECT	Approve Reject	APPROVE (Approve) REJECT (Reject)
ASSIGN_TYPE_CODE	Assign Type	RESASGN (Resource Assignment) ROLEASGN (Role Assignment)
BASE_RULE	Base Rule	BASE_RULE (Base Rule)
BATCH_STATUS	Batch Status	POSTED (Posted) UNPOSTED (Unposted)
CALCULATION_STATUS	Calculation Status	COMPLETED (Completed) FAILED (Failed) INCOMPLETE (Incomplete) PROCESSING (In Progress)

Lookup Type	Description	Lookup Code and Meaning
CALCULATION_TYPE	Types of Calculation	BONUS (Bonus) COMMISSION (Commission)
CALC_SUBMISSION_OBJECT_TYPE	Calculation Submission Object	CALC_TYPE (Calculation Type) CONCURRENT_FLAG (Concurrent Calculation) EMPLOYEE_NUMBER (Employee Number) EMPLOYEE_TYPE (Employee Type) END_DATE (End Date) HIERARCHY_FLAG (Entire Hierarchy) INTELLIGENT_FLAG (Do incremental calculation or not) INTERVAL_TYPE (Interval Type) NAME (Calculation Submission Batch Name) RESPONSIBILITY_NAME (Application responsibility name) SALESREP_OPTION (Resources) START_DATE (Start Date) USER_NAME (Application User Name)
CLASSIFICATION_DATATYPE	Classification Datatype	ALPN (Alpha Numeric) DATE (Date) NUMB (Numeric)
CLASSIFICATION_STATUS	Classification Status	CLS (Classified) NEVER (Never Classified) XCLS (Failed Classification)
CN_HEAD_TRX	Header Transaction Status	CALC (Calculated) OBSOLETE (Obsoleted) POP (Populated) ROLL (Rolled Up) XCALC (Failed Calculation) XPOP (Failed Population)

Lookup Type	Description	Lookup Code and Meaning
CN_LEVEL_NUMBER	Level Number for Executive Portal Report	0 (Self with No Levels) 1 (One Level Down) 2 (Two Levels Down) 3 (Three Levels Down) 4 (Four Levels Down) 5 (Five Levels Down)
CN_NOTES	Notes	NOTES (Notes)
CN_OPERAND	Incentive Compensation Operand	0 (AND) 1 (OR)
CN_OPERATOR	Incentive Compensation Operator	0 (AND) 1 (OR)
CN_PAY_GROUP_DTLS_TYPE_CODE	Lookup code for Pay Group Details Display by	PERIODS (Periods) SALESPEOPLE (Resources)
CN_PROMPTS	Prompt Texts used in UI interface	DIMENSION_NAME (Dimension Name) EXP_NAME (Expression Name) FORMULA_NAME (Formula Name) RATE_TABLE_NAME (Rate Table Name)
CN_R2P_CLUB_ELIG	Club Eligibility Flag	Y (Yes) N (No)
CN_RULE_CREATE_TYPE	Rule Create Type	ROOT (Root) CHILD (Child) SIB (Sibling)
CN_SEARCH_CATEGORIES	Sales Compensation Search Categories	JOBTITLE (Job Title) ROLE (Role) SALESREP (Resource) QUOTA (Quota)
CN_USAGE_FLAG	Incentive Compensation Usage Flag	C (Collection) Y (Calculation)

Lookup Type	Description	Lookup Code and Meaning
COLLECTION_TYPE	Collection Type	CN_COLLECT_CLAWBACK (Clawbacks) CN_COLLECT_CUSTOM (Collect Custom Transaction Source) CN_COLLECT_INVOICES (Collect Invoices) CN_COLLECT_ORDERS (Collect Orders) CN_COLLECT_PAYMENTS (Collect Payments) CN_COLLECT_WRITEOFFS (Collect Writeoffs) CN_COLLECT_RAM (Collect Revenue Adjustments)
COLUMN_TYPE	Column Type	CF (Commissions Factor) CN (User Defined) EF (Event Factor) IN (System) PF (Payment Factor)
CP_OBJECT_TYPE	Compensation Plan Objects	CP_NAME (Compensation Plan Name) DESC (Description) END_PERIOD (End Period) REV_CLS_OVERLAP (Allow Revenue Class Overlap) START_DATE (Start Date) START_PERIOD (Start Period) STATUS_CODE (Status Code)
CP_PHASE_CODE	Concurrent Request Phase Code	C (Completed) I (Inactive) P (Pending) R (Running)

Lookup Type	Description	Lookup Code and Meaning
CP_STATUS_CODE	Concurrent Request Status Code	A (Waiting) B (Resuming) C (Normal) D (Cancelled) E (Error) G (Warning) H (On Hold) I (@Normal) M (No Manager) P (Scheduled) Q (Standby) R (@@Normal) S (Suspended) T (Terminating) U (Disabled) W (Paused) X (Terminated) Z (@Waiting)
CURRENCY_TYPE	Currency Type used in reports	FUNCTIONAL_CURRENCY (Functional Currency) SALESREP_CURRENCY (Resource Currency)
DATA_TYPE	Column Datatypes	DATE (Date) LONG (Long) NUMBER (Number) VARCHAR2 (Varchar2)
DELIMITER_TYPE	Delimiter Type	COMMA (Comma) QUOTE (Single Quotation) DOUBLEQ (Double Quotation) SEMICOL (Semi-colon) SPACE (Space) TAB (Tab)

Lookup Type	Description	Lookup Code and Meaning
DISCOUNT_OPTION	Discount Option	NONE (Not apply discount percentage) PAYMENT (Apply to payment factor) QUOTA (Apply to quota factor)
DISTINGUISHED_HIERARCHIES	Distinguished Hierarchies	REVENUE_CLASS (Revenue Class Rollup) SALESREP (Sales Representative Rollup)
DISTRIBUTE_METHOD	Method for distributing quota	EQUAL (Equal) EVEN (Even) MIN (Minimum)
DYNAMIC_PROMPT	Period Processing Status Dynamic Prompt	DISTRIBUTE_DRAW (Distribute Draw) DISTRIBUTE_TARGET (Distribute Target) DRAW (Draw) PAYMENT (Payment) PERIOD_DRAW (Period Draw) PERIOD_TARGETS (Period Targets) TARGET (Targets)
ELEMENT_TYPE	Element Type	-1000 (Recoverable Payment) -1001 (Nonrecoverable Payment)
ENCLOSED_TYPE	Enclosed Type	COMMA (Comma) QUOTE (Single Quotation) DOUBLEQ (Double Quotation) SEMICOL (Semicolon)

Lookup Type	Description	Lookup Code and Meaning
EVENT_NAME	Event Name	CHANGE_CLS_HIER (Change a hierarchy used in classification) CHANGE_CLS_HIER_DATE (Change a hierarchy date used in classification) CHANGE_CLS_HIER_DELETE (Delete a hierarchy interval used in classification) CHANGE_CLS_HIER_PERIOD (Change a hierarchy interval used in classification) CHANGE_CLS_RULES (Change classification rules) CHANGE_CLS_RULES_ATTR (Change classification rules attribute) CHANGE_CLS_RULES_DATE (Change classification ruleset date range) CHANGE_CLS_RULES_HIER (Change classification rules hierarchy) CHANGE_CLS_RULES_REV (Change classification rules revenue class) CHANGE_CLS_RULES_SET (Change classification rules set) CHANGE_COMP_PLAN (Change compensation plan) CHANGE_COMP_PLAN_OVER_LAP_FLAG (Change compensation plan overlap flag) CHANGE_COMP_PLAN_PERIOD (Change compensation plan effective interval) CHANGE_CP_ADD_MGR (Add a manager to a compensation group) CHANGE_CP_ADD_SRP (Add a salesperson to a compensation group)

Lookup Type	Description	Lookup Code and Meaning
EVENT NAME (continued)	Event Name	CHANGE_CP_DELETE_MGR (Delete a manager from a compensation group) CHANGE_CP_DELETE_SRP (Delete a salesperson from a compensation group) CHANGE_CP_HIER_ADD (Add an edge to compensation group hierarchy) CHANGE_CP_HIER_DATE (Change date range of a compensation group hierarchy edge) CHANGE_CP_HIER_DELETE (Delete an edge from a compensation group hierarchy) CHANGE_CP_MGR_DATE (Change date range of a manager) CHANGE_CP_SRP_DATE (Change date range of a salesperson) CHANGE_DELETE_TRX (Delete transactions) CHANGE_FORMULA (Change a formula) CHANGE_INSERT_TRX (Insert new transactions) CHANGE_PERIOD_INTERVAL_NUMBER (Change a period's interval number) CHANGE_PLAN_ASSIGN (Change plan assignment) CHANGE_PLAN_ASSIGN_INS_DEL (Insert or delete plan assignment) CHANGE_PLAN_ASSIGN_PERIOD (Change plan assignment effective interval) CHANGE_QUOTA_CALC (Change plan element)

Lookup Type	Description	Lookup Code and Meaning
EVENT_NAME (continued)	Event Name	<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>

Lookup Type	Description	Lookup Code and Meaning
EVENT_NAME (continued)	Event Name	CHANGE_SRP_QUOTA_PAYEE_DATE (Change date range of payee assignment) CHANGE_SRP_QUOTA_POP (Change salesperson's uplift factors or payee assignment) CHANGE_SRP_ROLE_PLAN (Change role/plan or role/salesperson assignment) CHANGE_SRP_ROLE_PLAN_DATE (Change date range of role/plan/salesperson assignment) CHANGE_SYS_PARA_RC (Change revenue class hierarchy used) CHANGE_SYS_PARA_SRP (Change salesperson hierarchy and roll up flag) CHANGE_TEAM_ADD_REP (Add a salesperson to a team) CHANGE_TEAM_DEL_REP (Delete a salesperson from a team) CHANGE_UPDATE_TRX (Update transactions)
EXPRESSION_MESSAGES	Messages Required for Rule Attribute Expressions	AND (And) BET (Between) GT (Greater than) IIH (Is in Hierarchy) IS (Is) LT (Less than) NOT (Not) OR (Or) RES (Result) WV (With Value)

Lookup Type	Description	Lookup Code and Meaning
EXPRESSION_TYPE	Expression Type	EXPRESSIONS (Expressions) EXTERNAL_ELEMENTS (External Elements) FORECAST_AMOUNT (Forecast Amount) FORMULAS (Formulas) GROUP_FUNCTIONS (Group Functions) NUMBER_FUNCTIONS (Number Functions) OSC_ELEMENTS (Sales Compensation Elements) OTHERS (Others) PLAN_ELTS (Plan Elements) RATE_TABLE_RESULT (Rate Table Result) SQL_FUNCTIONS (SQL Functions)
EXTERNAL_TABLE	External Table	ALIAS (Alias) CN_CALC_EXT_TABLE_ID (Table) COLUMN (Columns) EXTERNAL_COLUMN_ID (External Column Name) EXTERNAL_TABLE_ID (External Table Name) INTERNAL_COLUMN_ID (Internal Column Name) INTERNAL_TABLE_ID (Internal Table Name) NAME (Name) SCHEMA (Schema) USED_FLAG (Used Flag)

Lookup Type	Description	Lookup Code and Meaning
FORMULA_STATUS	Formula Status	COMPLETE (Complete) FAILED (Failed) INCOMPLETE (Incomplete) IN_PROGRESS (In Progress) INVALID (Invalid) VALID (Valid)
FORMULA_TYPE	Formula Type	B (Bonus) C (Commission)
HEADER_TRX_STATUS	Transaction Header Statuses	CLS (Classified) COL (Unprocessed) ROLL (Rolled Up) XCLS (Failed Classification) XROLL (Failed Rollup)
HOLD_REASON_CODE	Hold Reason Code	HOLD (Hold)
IMPORT_STATUS	Import Status	CANCELED (Canceled) COMPLETED (Completed) FAILED (Failed) IMPORT_FAIL (Failed at Importing) NEW (New) SCHEDULED (Scheduled) STAGED (Staged) STAGE_FAIL (Failed at Staging) SUBMITTED (Submitted)
IMPORT_TYPE	Import Type	CALCEXP (Expressions) HIERARCHY (Hierarchy) IMPORT (Import) EXPORT (Export) REVCL (Revenue Class) RULES (Rules) TRXAPI (Transaction API)

Lookup Type	Description	Lookup Code and Meaning
INCENTIVE_TYPE	Incentive Type	BONUS (Bonus) COMMISSION (Commission) MANUAL (Manual) PAYMENT (Payment) QUOTA (Quota)
INCENTIVE_TYPES	Incentive Types	BONUS (Bonus) COMMISSION (Commission) MANUAL_PAY_ADJ (Manual Pay Adjustment) PMTPLN (Payment Plan) PMTPLN_REC (Payment Recovery)
INPUT_TOKEN	Input Token	CP_NAME (Comp Plan Name) NAME (Name) PE (Plan Element) PE_NAME (Plan Element Name) PERIOD_NAME (Period Name) QC (Quota Category) QSR (Quota Category/Sequence Number/Role) RC (Revenue Class) RCS (Role/Compensation Plan Name/Start Date) ROLE_NAME (Role Name) ROLLPERCENT (Rollover Percentage) RP (Base Quota Component/Percent) SD (Start Date) SEQ (Sequence Number) SPE (Source Plan Element) SR_NAME (Salesrep Name)

Lookup Type	Description	Lookup Code and Meaning
JE_BATCH_REASON	Reason for creating JE batch	BONUS (Bonus) CALC (Calculation) DRAW_BONUS (Draw Recovery from Bonus) DRAW_COMM (Draw Recovery from Commission) PAYMENT (Payment) PAY_ADJ (Adjustment Payment) PAY_BONUS (Payment from Bonus) PAY_COMM (Payment from Commission) PAY_DRAW (Draw Payment)
LOAD_STATUS	Load Status	LOADED (Loaded) UNLOADED (Unloaded)
MAPPING_TYPE	Mapping Types	COL (Collection) EVT (Event) SLC (Slice)
MESSAGE_TYPE	Message Types	DEBUG (Debug) ERROR (Error) TRANSLATE (Translated)
MGR_REPORT	Top Bottom Performance Report Hierarchy Level	1 (Directs) 2 (Level 1 Indirects) 3 (Level 2 Indirects) 4 (Level 3 Indirects) 5 (Level 4 Indirects) ALL (All)
MODEL_ACTIVATE_STATUS	Model Activate Status	ACTIVATED (Activated) NOT_ACTIVATED (Not Activated)
MODEL_STATUS	Model Status	MODELED (Modeled) NEW (New) PENDING (Pending) GENERATED (Generated)

Lookup Type	Description	Lookup Code and Meaning
MODULE_STATUS	Module Status	CONCFAIL (Concurrent Manager Down) GENERATED (Complete) INSTFAIL (Install Failed) INSTINPG (Install Pending) UNSYNC (Incomplete)
MODULE_STATUS_OLD	Old Module Status	DEF (Definition) GEN (Generated) GRQ (Generate Request) INS (Instantiated) IRQ (Instantiate Request)

Lookup Type	Description	Lookup Code and Meaning
MODULE_TYPE	Module Types	ACCGEN (Account Generation) CALCULATION (Calculation) CB (Clawback Collection Module) CB/GB (Clawback/Giveback Collection Module) CLS (Classification Module) COL (Collection Module) CPAPI (Compensation Plan API Module) INS (Commissions Instance Module) INV (Invoice Collection Module) LOADER (Transaction Interface Loader) ORD (Order Collection Module) PEAPI (Plan Element API Module) PMT (Payment Collections Module) PMT/GB (Payments/Giveback Collection Module) REVCLS (Revenue Classification) RUP (Rollup Module) SLC (Slice Module) TRF (Transfer Module) TRX (Commissions Transaction Table Module) WO (Writeoff Collection Module)
NOTIFY_ACTION	The action to be taken due to events caused by changing compensation group hierarchy	DELETE (Delete transactions) PULL (Pull transactions up) ROLL (Roll transactions up) ROLL_PULL (Roll and pull transactions up)

Lookup Type	Description	Lookup Code and Meaning
NOTIF_LOOKUP_TYPE	Lookup used by SF Planning workflow process	ACCEPT/REJECT (Accept) APPROVE (Approve) CUSTOMIZED (Customized) DISTRIBUTE (Distribute) NOTIFIED (Notification Sent) NOT_NOTIFIED (Notification not Sent) REMINDER (Reminder)
OBJECT_STATUS	Object Status	I (Invalid) N (New) V (Valid)
OBJECT_TYPE	Object Types	COL (Column) DBL (Database Link) IND (Index) PKB (Package Body) PKS (Package Specification) PRC (Procedure) SEQ (Sequence) TBL (Table) TRG (Trigger)
ORDER	Order	ASC (Ascending) DESC (Descending)
ORGANIZATION	Organization	ALLIANCES (Alliances) BOL (Business Online) EDUCATION (Education) ISD (Telesales) SALES (Sales) SC (Sales Consulting) SUPPORT (Support)

Lookup Type	Description	Lookup Code and Meaning
PAYABLES_CCID_LEVEL	Payables CCID Level	REVCLS (Revenue Class) PLANELEM (Plan Element) CUSTOM (Custom) CLASSIFICATION (Classification)
PAYGROUP_UPGRADE_TYPE	Paygroup Upgrade Type	UPGRADE_PAYGROUP (Upgrade Pay group)
PAYMENT_CHANGE	Payment Change	BONUS (Bonus Change) COMMISSION (Commission Change)
PAYMENT_GROUP_CODE	Payment Group Code	STANDARD (Standard)
PAYMENT_INCENTIVE_TYPE	Payment Incentive Type	ALL (All) BONUS (Bonus) COMMISSION (Commission)
PAYMENT_PLAN_TYPE	Payment Plan Type	MIN/MAX (Minimum/Maximum Plan)
PAYRUN_ACTION	Payrun Action	CREATE (Create Payrun) FREEZE (Freeze Payrun) PAY (Pay Payrun) REFRESH (Refresh Payrun) REMOVE (Remove Payrun) UNFREEZE (Unfreeze Payrun)
PAYRUN_STATUS	Payrun Status	PAID (Paid) PAID_WITH_RETURNED_FUNDS (Paid with Returned Funds) POSTED (Posted) RETURNED_FUNDS (Returned Funds) UNPAID (Unpaid) FROZEN (Frozen) ALL (All)
PAY_GROUP_DTLS_TYPE_CODE	Pay Group Details Type Code	PERIODS (Period) SALESPEOPLE (Resource Assignment) ROLES (Role Assignment)

Lookup Type	Description	Lookup Code and Meaning
PAY_GROUP_VALIDATION_TYPE	Pay Group Validation	END_DATE (Pay Group End Date) PAY_GROUP_NAME (Pay Group Name) PERIOD_SET_NAME (Calendar) PERIOD_TYPE (Period Type) START_DATE (Pay Group Start Date)
PAY_RUN_VALIDATION_TYPE	Payrun Validation	CREDIT_TYPE (Credit Type) EMPLOYEE_NUMBER (Employee Number) EMPLOYEE_TYPE (Employee Type) PAY_DATE (Pay Date) PAY_GROUP_NAME (Pay Group Name) PAY_PERIOD (Pay Period) PAY_RUN_NAME (Payrun Name) ROLE (Role) SALES_PERSON (Salesperson)
PAY_STATUS	Pay Status	PAID (Paid) UNPAID (Unpaid)
PA_OBJECT_TYPE	Compensation Plan Assignment Objects	EMP_NUM (Employee Number)
PERIOD_PROCESSING_STATUS	Period Processing Status	CALCULATED (Calculated) CLASSIFIED (Classified) CLEAN (Clean) POPULATED (Populated) PROCESSING (In Progress) ROLLED_UP (Rolled Up) UNCLASSIFIED (Unclassified)
PERIOD_TARGET_DIST_RULE	Period Target Distribution Rule	EQUAL (Equal) USER_DEFINED (User Defined)
PERIOD_TYPE_CODE	Period Type	PERIOD (Period) QUARTER (Quarter) YEAR (Year)

Lookup Type	Description	Lookup Code and Meaning
PE_OBJECT_TYPE	Plan Element Objects	CALC_FORMULA_ID (Formula ID) CALC_FORMULA_NAME (Formula Name) CREDIT_TYPE (Credit Type) CUM_FLAG (Accumulate Flag) DESC (Description) DISC_OPTION (Discount Option) DISC_RATE_TB (Discount Rate Table) DISC_RATE_TB_ID (Discount Rate Table ID) DRAW_AMOUT (Draw Amount) END_DATE (End Date) END_PERIOD (End Period) END_PERIOD_ID (End Period ID) INCENTIVE_TYPE_CODE (Incentive Type) INTERVAL_NAME (Interval Name) ITD_FLAG (Interval to Date) PACKAGE_NAME (Package Name) PAYMENT_AMOUT (Payment Amount) PAYMENT_FACTOR (Payment Uplift) PAYMENT_TYPE (Payment Type) PERIOD_TYPE (Interval Type) PE_NAME (Plan Element Name) QUOTA_FACTOR (Quota Uplift) QUOTQ_TYPE (Element Type) RATE_TB (Rate Table) RATE_TB_ID (Rate Table ID) REV_CLS_ID (Revenue Class ID) REV_CLS_NAME (Revenue Class Name)

Lookup Type	Description	Lookup Code and Meaning
PE_OBJECT_TYPE (continued)		REV_CLS_TARGET (Revenue Class Target) SPLIT_FLAG (Split Flag) START_DATE (Start Date) START_PERIOD (Start Period) START_PERIOD_ID (Start Period ID) TARGET (Quota) TRX_GROUP (Apply Trx) UPLIFT_END_DATE (Uplift End Date) UPLIFT_PAYMENT_FACTOR (Uplift Payment Factor) UPLIFT_QUOTA_FACTOR (Uplift Quota Factor) UPLIFT_START_DATE (Uplift Start Date)
PLAN_ELEMENT_METRICS	Plan Element Metrics	COMMISSION_PAYED_ITD (Interval To Date Commission Paid) COMMISSION_PAYED_PTD (Period To Date Commission Paid) INPUT_ACHIEVED_ITD (Interval To Date Input Achieved) INPUT_ACHIEVED_PTD (Period To Date Input Achieved) ITD_PAYMENT (Interval To Date Payment) ITD_TARGET (Interval to Date Target) PERF_ACHIEVED_ITD (Interval To Date Sales Credit) PERF_ACHIEVED_PTD (Period To Date Sales Credit) PERIOD_PAYMENT (Period Payment) TARGET_AMOUNT (Target Amount)
PLAN_GENERATE_STATUS	Plan Generation Status	FAILED (Failed) NOT_PUSHED (Not Activated) PUSHED (Activated)

Lookup Type	Description	Lookup Code and Meaning
PLAN_OBJECT_STATUS	Compensation Plan Object Status	COMPLETE (Complete) INCOMPLETE (Incomplete)
PLAN_STATE	Plan State	ACTIVE (Active) INACTIVE (Inactive) IN_PROGRESS (In Progress)
PLAN_STATUS	Contract Plan Status	ALL (All) ACCEPTED (Accepted) APPROVED (Approved) ISSUED (Distributed) SUBMITTED (Submitted)
PLAN_TYPE_STATUS	Plan Type Status	ACCEPTED (Accepted) APPROVED (Approved) GENERATED (Generated) ISSUED (Distributed) LOCKED (Locked) PENDING (Pending) REJECTED (Rejected) SUBMITTED (Submitted)
PLAN_TYPE_SUMMARY_STATUS	Plan Type Summary Status	PLGS (Pending Approval) APPROVED (Pending Distribution) ISSUED (Pending Acceptance) ACCEPTED (Accepted)
PMT_PLAN_VALIDATION_TYPE	Payment Plan Validation Type	CREDIT_TYPE (Credit Type) PMT_PLAN_NAME (Payment Plan Name) START_DATE (Start Date)
POSTING_TYPE	Posting Type	EXPENSE (Expense) NON_REC (Non Recoverable) REC (Recoverable) TO_REC (To Recover)

Lookup Type	Description	Lookup Code and Meaning
PRE_PROCESSED_CODE	Preprocessed Code	CRPN (Skip Calculation) CRPC (Skip Nothing) CRNC (Skip Population) CRNN (Skip Population and Calculation) CNPC (Skip Rollup) CNPN (Skip Rollup and Calculation) CNNC (Skip Rollup and Population) CNNN (Classification Only) NRPC (Skip Classification) NRPN (Skip Classification and Calculation) NRNC (Skip Classification and Population) NRNN (Rollup Only) NNPC (Skip Classification and Rollup) NNPN (Population Only) NNNC (Calculation Only) NNNN (Skip All)
PROCEDURE_TYPE	Procedure Types	F (Function) P (Procedure) PRIVATE (Private Procedure) PUBLIC (Public Procedure)
PROCESSING_STATUS_CODE	Processing Status	CLEAN (No calculation has ever happened in this period)
PROCESS_TYPE	Process Types	GEN (Generate) INS (Instantiate) XFR (Transfer)

Lookup Type	Description	Lookup Code and Meaning
QUOTA_CATEGORY	Quota Category Type	FIXED (Fixed) TOTAL_QUOTA (Total Quota) VAR_NON_QUOTA (Variable, Non Quota Based) VAR_NON_REVENUE (Variable, Non Revenue Based) VAR_QUOTA (Variable, Quota Based)
QUOTA_GROUP_CODE	Quota Group Code	BONUS (Bonus) QUOTA (Quota)
QUOTA_PAYMENT_TYPE	Quota Payment Type	FIXED (Fixed Amount) PAYMENT (Payment Amount Percentage) TRANSACTION (Applied Transaction Amount Percentage)
QUOTA_TRX_GROUP	Quota Transaction Group	GROUP (Grouped by Interval) INDIVIDUAL (Individually)
QUOTA_TYPE	Quota Type	DISCOUNT (Discount) DRAW (Draw) EXTERNAL (External) FORMULA (Formula) MANUAL (Manual) MARGIN (Margin) NONE (None) REVENUE (Revenue Non Quota) TARGET (Revenue Quota) UNIT_BASED_NON_QUOTA (Unit Non Quota) UNIT_BASED_QUOTA (Unit Quota)
RATE_CALC_METHOD	Rate Calculation Method	ANCHORS (Anchors) SINGLE_RATE (Single Rate)

Lookup Type	Description	Lookup Code and Meaning
REPORT_SECURITY_LEVEL	Report Security Level	A (Analyst) M (Manager) R (Salesrep) S (Super User)
REPOSITORY_STATUS	Repository Status	A (Active) I (Inactive)
REPOSITORY_USAGE	Repository Usages	A (All) P (Collector) S (Calculator)
RESOURCE_PLAN_ACTIVATE_STATUS	Resource Plan Activation Status	FAILED (Failed) NOT_PUSHED (Not Activated) PUSHED (Activated)
RESPONSIBILITY_GROUPS	Salesforce Planning Responsibility Groups	CN_SF_CONTRACT_APPROVER (Contract Manager) CN_SF_FINANCE_MGR (Finance Manager) CN_SF_SALES_MGR (Sales Manager) CN_SF_SUPER_USER (Super User) CN_SF_SALESREP (Sales Force User)
RETURN_STATUS	API Return Status	E (Error) S (Success) U (Unexpected Error) W (Warning)
REVENUE_TYPE	Transaction Credit Type	NONREVENUE (Nonrevenue) REVENUE (Revenue)

Lookup Type	Description	Lookup Code and Meaning
RS_OBJECT_TYPE	Rate Table Objects	COMM_AMT (Commission Amount) COMM_UNIT_CODE (Commission Unit Code) MAX_AMT (To Tier Maximum Amount) MIN_AMT (From Tier Minimum Amount) RATE_TB_NAME (Rate Table Name) TIER_UNIT_CODE (Tier Unit Code)
RULE_CREATE_TYPE	Rule Create Type for Root, Sibling, Child	CHILD (Child) ROOT (Root) SIB (Sibling)
RULESET_TYPE	Ruleset Type	DATA_FLAG (Date Flag) END_DATE (End Date) EXPRESSION (Expressions) MODULE_TYPE (Module Type) OBJECT_NAME (Object Name) PARENT_RULE_ID (Parent Rule Identifier) RULES (Rules) RULE_ATTRIBUTES (Attributes) RULESET_ID (Ruleset Identifier) RULESET_NAME (Ruleset Name) RULE_ATTRIBUTE_ID (Rule Attribute Identifier) RULE_ID (Rule Identifier) RULE_NAME (Rule Name) SEQUENCE_NUMBER (Sequence Number) START_DATE (Start Date)

Lookup Type	Description	Lookup Code and Meaning
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)
SCENARIO_STATUS	Scenario Status	SET (Set) NOT_SET (Not Set)

Lookup Type	Description	Lookup Code and Meaning
SF_FORMULA_TEXT	SF Formula Text	EXPR_RTRS_DESC (SF Planning Rate Result) EXPR_RTRS_NAME (SFP Rate_Rslt) EXPR_RTRSXTXN_AMT-DESC (SF Planning Rate Result times Transaction Amount) EXPR_RTRSXTXN_AMT-NAME (SFP Rate_Rslt*Trx_amount) EXPR-TRX_AMT-DESC (SF Planning Transaction Amount) EXPR-TRX_AMT-NAME (SFP Trx_amount) EXPR-TRX_AMT/QTA-DESC (SF Planning Transaction Amount divided by Quota) EXPR-TRX_AMT/QTA-NAME (SFP Trx_amount/quota) FORMU-RQAP-DESC (SF Planning Revenue Quota Applied Amount Percentage) FORMU-RQAP-NAME (SFP RQAP Formula) FORMU-RQFA-DESC (SF Planning Revenue Quota Fixed Amount) FORMU-RQFA-NAME (SFP RQFA Formula) FORMU-UQFA-DESC (SF Unit Quota Fixed Amount) FORMU-UQFA-NAME (SFP UQFA Formula) RT_TBL_RESULT (Rate Table Result) TARGET (Target) TRN_AMOUNT (Transaction Amount)

Lookup Type	Description	Lookup Code and Meaning
SF_FORMULA_TYPE	SF Formula Type	RQAP (Revenue Based Quota Applied Amount Percentage) RQFA (Revenue Based Quota Fixed Amount) UQFA (Unit Based Quota Fixed Amount)
SPLIT_FLAG	Split Flag	N (No Split) P (Proportional) Y (Non-Proportional)
SRP_OBJECT_TYPE	Salesrep Object Type	ALL_ROLE (All Sales Roles) EMP_NUM (Employee Number) END_DATE (End Date) PAY_GRP (Pay Group Name) PMT_PLN (Payment Plan Name) ROLE (Sales Role Name) SRP_NAME (Salesperson Name) SRP_TYPE (Salesperson Type) START_DATE (Start Date)
SRP_PAYEE_OBJECTS	SRP Payee Assigns Objects	COMP_NAME (Compensation Name) EMPLOYEE_NUMBER (Employee Number) END_DATE (Payee End Date) PAYEE_NAME (Payee Name) PAYEE_START_DATE (Payee Start Date) PE_NAME (Plan Element Name) ROLE_NAME (Role Name) SALESREP_NAME (Resource Name) START_DATE (@Payee Start Date)

Lookup Type	Description	Lookup Code and Meaning
TABLE_LEVEL	Table Levels	D (Dimension) H (Header Level) I (Internal) L (Line +) N (None) S (Sales Line)
TABLE_TYPE	Table Types	T (Table) V (View)
TABLE_USAGE	Table Usage	C (Collection) N (None) Y (Calculation)
TBL_COL_DETAIL	Table Column Detail	COL (Columns)
TIMESCALE	Timescale	PERIOD (Period) QUARTER (Quarter) YEAR (Year)
TIME_INTERVAL_TYPE	Time Interval Type	PTD (Period to Date) QTD (Quarter to Date) YTD (Year to Date)
TOP_BOTTOM_PERF	Top Bottom Performer	BOTTOM (Bottom) TOP (Top)
TRIGGERING_EVENT	Triggering Event	D (Delete) I (Insert) U (Update)

Lookup Type	Description	Lookup Code and Meaning
TRX_TYPES	Transaction Types	BALANCE_UPGRADE (Balance Upgrade) CBK (Clawback) CM (Credit Memo) DEP (Deposit) DM (Debit Memo) GBK (Giveback) INV (Invoice) MAN (Manual Transaction) ORD (Order) PMT (Payment) PMTPLN (Payment Plan) PMTPLN_REC (Payment Plan Recovery) RET (Order Return) UPGRADE (Upgrade) WO (Writeoff)
TRX_ROLLUP_METHOD	Transaction Rollup Method	INV (Invoice Processing Date) ORD (Order Processing Date)
TRX_STATUS	Commission Line Status	CALC (Calculated) CLS (Classified) COL (Unprocessed) NCALC (No Calculation) OBSOLETE (Obsoleted) PAYEE (Payeed) POP (Populated) ROLL (Rolled Up) XCALC (Failed Calculation) XCLS (Failed Classification) XPAYEE (Failed Payee) XPOP (Failed Population) XROLL (Failed Rollup)

Lookup Type	Description	Lookup Code and Meaning
UNIT_OF_MEASURE	Measurement unit	AMOUNT (Amount) EXPRESSION (Expression) PERCENT (Percent) STRING (String)
UNIT_TYPE	Unit Type	UNIT (Unit) REVENUE (Revenue)
VIEW_PROCESS_LOG_TYPE	View Process Log Type	ALL (All) BRIEF (Brief) MILESTONE (Milestone Only) ERROR (Errors Only) DEBUG (Debugs Only)
WORKSHEET_ACTION	Worksheet Action	APPROVE (Approve Worksheet) CREATE (Create Worksheet) LOCK (Lock Worksheet) REFRESH (Refresh Worksheet) REJECT (Reject Worksheet) REMOVE (Remove Worksheet) SUBMIT (Submit Worksheet) UNLOCK (Unlock Worksheet)
WORKSHEET_STATUS	Payment Worksheet Status	APPROVED (Approved) LOCKED (Locked) SUBMITTED (Submitted) UNPAID (Unpaid)
YES_NO	Yes or No	N (No) Y (Yes)
YTD_GRAPH_TYPE	YTD Graph Type	A (All) C (Achievement) E (Earnings) N (None) P (Payment)

System Profile Options

C.1 System Profile Options

The tables below lists the profile options which need to be set to implement Oracle Incentive Compensation after the product has been installed. You must set them before the system is ready to be used to build compensation plans, collect and process transactions, and pay incentive compensation. The options can be set in any sequence.

To set system profile options, perform the following procedure.

Responsibility

System Administrator

Login

Log in to Oracle Forms

Navigation

Navigator > System Profiles

Steps

1. In the Navigator, double-click Profile.
2. Double-click System.
3. In the Find System Profile Values window, query the following categories to narrow your search:
 - *Site*: Select if the profile option applies to all users at your site.
 - *Application*: Oracle Sales Compensation

- *Responsibility*: Select only if the profile option you are defining is specific to a responsibility.
 - *User*: Select only if the profile option you are defining is specific to a user.
4. In the Profile field, you can enter OSC% to see most of the Incentive Compensation profiles (most of them begin with OSC:). Or, enter another search parameter. You can use the percent sign (%) as a wildcard.
 5. Click **Find**.
 6. View or change the profile setting.
 7. Save.

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

C.2 Table of System Profile Options

The following table lists by name and in alphabetical order the system profiles used by Oracle Incentive Compensation. The table includes the following columns from left to right:

- **Profile Name:** Name of the profile.
- **Description:** Explains what the profile does.
- **Level:** Level at which this profile option can be set. A = Application, S = Site, R = Responsibility, U = User.
- **Default:** Lists the seeded default for the profile, if any.

Table C-1 System Profile Options

Profile Name	Description	Level	Default
AMS: Item Validation Master Organization	This is required if you want to display the Product tab in Oracle Incentive Compensation. The value is selected by using an LOV (master organization for which items are defined).	ASRU	Blank
Bypass Group Validation	Set to Y to bypass group usages when defining a resource and assigning that resource to a resource group.	ASR	No

Table C-1 System Profile Options

Profile Name	Description	Level	Default
OSC: Collect on Acct Credits	If set to No, the application collects only invoices and regular credit memos. If set to Yes, then the application also collects account credit memos when running Oracle Receivable Collection.	ASRU	No
OSC: Commission Rate Precision	Determines the commission amount precision in a rate table. For example, 1.035 has a precision of 3.	ASRU	Null
OSC: Currency Exchange Rate Date	If Yes, the application reads the exchange rate date in Oracle GL while using Incentive Planning.	S	System Date
OSC: Customized Summarization	This profile tells the application whether you are using default or customized summarization code to aggregate transactions during rollup. This profile option works only if the Roll Summarized Transactions profile is set to Yes.	ASRU	Null
OSC: Debug Mode	Determines whether debugging messages are written to the process log during execution of programs (concurrent and online). Setting Debug Mode to Yes writes these errors to the CN_PROCESS_AUDIT_LINES table.	ASRU	Yes
OSC: Default Conversion Type	Select the type of currency conversion. For example, corporate (usually budget translation rate from Oracle GL), spot (daily rate from Oracle General Ledger), user (user-defined rate as entered through Period Rates).	ASR	Null
OSC: Default Custom Flag	When set to Yes, the compensation plans are customized. Otherwise, they are not customized.	ASRU	Yes

Table C-1 System Profile Options

Profile Name	Description	Level	Default
Display Draw	In OSO, the draw related information is displayed on the YTD report when this profile is set to 'Y'. Otherwise, the draw related data is not displayed.	ARU	Null
OSC: Enable Hierarchy Edges T4 Trigger	Set whether to execute a portion of cn_hierarchy_edges_t4 trigger or not.		Null
OSC: Import Control File Directory	This is the directory where the SQL Loader control file is stored. It is recommended that this profile be set at the site level to absolute path for \$CN_TOP/bin. \$CN_TOP/bin has to be first translated into a full physical path. If the bin directory does not exist it should be created, with read/write/ execute permission given to it.	ASRU	Null
OSC: Import Server Side Data File Directory	The directory where the CSV files for server side transaction import are located. See Guidelines.	ASRU	Null
OSC: Income Planner Disclaimer	Determines whether to use the customized disclaimer in the Income Planner.	ASRU	No
OSC: Internal Oracle Contract Flag	Determines whether Internal Oracle Flag is set or not.	S	No
OSC: Invoice Split Upgrade End Date	The end date for the invoice split upgrade process.	ASRU	Null
OSC: Invoice Split Upgrade Start Date	The start date for the invoice split upgrade process.	ASRU	Null
OSC: Log File	If set to Yes, debugging messages are written to a log file. Only enable this profile option for debugging purposes if there are suspected problems with the application. If enabled, this profile option generates log files, which can affect performance.	ASRU	No

Table C-1 System Profile Options

Profile Name	Description	Level	Default
OSC: Log File Directory	Sets the directory to which the log file will be written. When you enter the directory path, you do not need to enter a slash after the name.	ASRU	Null
OSC: LOV Input Validation	If set to Yes, the two profiles <i>OSO: Minimum search string length</i> and <i>OSO: Search Lead Wildcard</i> are enforced in LOVs.	ASR	Yes
OSC: Mapping between Revenue Classes and Interest Types		ASRU	
OSC: Mark Events	If set to Yes, every event is put into the Notify Log so that it can be included in the next incremental calculation. Recommended that you set it to No while setting up your system, but change it to Yes when you are ready to start collecting transactions.	ASRU	Yes
OSC: Multi Rollup Path	Enables rollup of sales credits through multiple paths of the compensation group hierarchy. See <i>Guidelines</i> for restrictions on using this profile.	ASRU	Null
OSC: Negate during Revenue Adjustments Collection	Determines whether to negate during Revenue Adjustments Collection. If set to Yes, Revenue Adjustments Collection first negates the corresponding transactions that have been collected before, and then re-collects from Oracle Receivables with the new revenue adjustments. If set to No, Revenue Adjustments Collection does not negate any corresponding transactions in OIC that have been collected before. Only the new revenue adjustment in Oracle Receivables are collected.	ASRU	Yes

Table C-1 System Profile Options

Profile Name	Description	Level	Default
OSC: Number of Batch Workers	Set the number of parallel workers that the OIC Sales Credit Allocation Transfer process uses.	ASRU	1
Pay by Transaction	<p>Determines if payment details for a worksheet are displayed at the transaction level or aggregated at the plan element level. Valid values are Y and N.</p> <p>If the value is set to Y, the payment details are shown at the transaction level. If the value is set to N, the payment details are aggregated at the plan element level.</p> <p>If set to N and integration with AP is by Revenue Class, expense codes are not displayed in AP.</p>	S	N
OSC: Prior Adjustment	Allows prior adjustments. If set to No, allows all plan element types in a period to be calculated incrementally. Before setting to No, be sure that any transactions that have a process date earlier than the latest process date shown in the System Parameter window have been calculated.	ASRU	Yes
OSC: Report Security Level		SRU	Salesrep
OSC: Reporting Hierarchy	Determines which hierarchy is used for the Hierarchy Summary report.	ASR	Sales Compensation
Reset Balances Each Year	If the profile is set to Yes, then the salesrep subledger balances (cn_srp_periods) get reset to zero at the beginning of each fiscal year during calculation and payment. Otherwise the balances carry over across fiscal years.	S	No

Table C-1 System Profile Options

Profile Name	Description	Level	Default
OSC: Reset Error Transactions	Determines whether or not the system resets the load status of error transactions to UNLOADED so that they can be picked up again during the next transaction loading process.	ASRU	No
OSC: Roll Summarized Transactions	Sets up the application to aggregate matching transactions.	ASRU	Null
OSC: Salesforce Planning Debug Mode	Determines whether input variables show on the screen.	S	No
OSC: Salesforce Planning FY	This optional setting is used to set the fiscal year for which you are currently planning. You can set a valid year, for example, 2002, or leave the profile unset. If the profile is set to a valid year, the date on search screens defaults to the start of the fiscal year if the current date is smaller than the date of the start of the fiscal year.	S	Null
OSC: Scaling Factor	Select scaling factor. For example, In Thousands will display 1,000,000 as 1,000 and there will be a note at the top of the table, "USD in thousands".	ASRU	No Scaling
OSC: Sleep Time in Seconds	Sets the amount of idle time between each phase of calculation. The idle time gives each phase time to complete the current process without being queried by the system for a status. For high volume transactions, use the default setting.	ASRU	30 seconds
OSC: SQL Spool Path	Spool path for SQL scripts	ASRU	/d07/app /applcsf/h m000a/out

Table C-1 System Profile Options

Profile Name	Description	Level	Default
OSC: SFP Disable Workflow Notifications	Profile to disable Workflow Notifications being sent in Incentive Planning. If set to Yes, no notification will be sent to appropriate authority in the case of compensation plan submission, approval or distribution.	SR	No
OSC: SFP Responsibility Group	Profile that is to be set up for each responsibility created for use in Salesforce Planning. The four permissible values are Super User, Contract Approver, Finance Manager, and Sales Manager. The profile setting identifies the data access privileges that are assigned to a particular responsibility.	R	Null
Total Rev % is Not 100	In Sales Credit Allocation, Revenue Split Total is not 100%.	AS	Custom
OSC: Tracking Invoice Lines	When this profile is set to 'Y', any splits or moves done to Invoices are updated to the credit memos and payments, unless the transactions are delinked.	ASRU	No
OSC: Use Work Day Calendar	This profile enables use of the Workday Calendar in proration calculation. (Default is No). Only when this profile is set to Yes is the Workday calendar that is defined for the organization used in proration calculation.	SR	No
OSC: User's Employee Number	Obsoleted		
OSC: User's Type	Obsoleted		

Table C-1 System Profile Options

Profile Name	Description	Level	Default
OSC: Validate Payment Worksheet Statuses	Determines whether the validate payment worksheets statuses must be Approved when paying a payrun. Enables auto approval process for payruns after they have been frozen. When set to Yes, the approval process for worksheets is enforced to pay a payrun. When set to No, a payrun can be paid after it has been frozen regardless of the status of worksheets in the payrun.	S	Y
OSC: Workflow Initial Wait Time in Hours	Sets the number of hours before the first reminder is issued.	ASRU	Null
OSC: Workflow Reminder Frequency in Hours	Sets the interval, in hours, between two reminders.	ASRU	Null
OSO: Debug Messages On	Setting to display or hide debugging messages	ASRU	No
OSO: Enabled Instruction Text	If set to "On", instruction text appears on applicable pages. If set to "Off", instruction text is not displayed.	ASRU	On
OSO: Enable Record Count in Tables	Enables record count in tables.	ASRU	No
OSO: Max Attachment Size	Maximum attachment size in bytes.	S	100,000
OSO: Max Chart Legends	Maximum number of legends in a chart.	ASRU	20
OSO: Max Legend Label Length	Maximum number of characters in chart legend labels.	ASRU	22
OSO: Minimum search string length	Used in Incentive Compensation to set the minimum number of characters required for any search from a text field.	S	4
OSO: Search Lead Wildcard	Indicates if % can be the first character in a search sent to a list of values	ASRU	No

Guidelines

The following three profile options are set automatically if you run AutoConfig. All of them set the displayed default value at Site Level.

- OSC: Import Server Side Data File Directory - Set to @"%s_applcsf%/inbound/%s_contextname%".
- OSC: Import Control File Directory - Set to "\$CN_TOP/bin"
- OSC: Log File Directory - Set to "%s_applptmp%"

If your inbound/outbound file is being created or is used by a concurrent program, set your profile option value as follows:

- If your profile is used for creating outbound files: "%s_applcsf%/outbound/%s_contextname%"
- If your profile is used for reading or using inbound files: "%s_applcsf%/inbound/%s_contextname%"

Variable and Description (Source adctxinf.tmp, adxmlctx.tmp from ARU):

- %s_applcsf% -> APPLCSF
- %s_contextname% -> The name of the Oracle Applications system which this context points to. This is necessary in order to support running multiple Oracle instances from the same APPL_TOP.

If the value for your profile needs to be defined as a directory in the utl_file_dir parameter in the INIT.ora, please set the value for the profile to:

%s_applptmp% .

APPLPTMP is the standard directory in which Oracle Applications temporary files are created and the directory in which PL/SQL output files are created.

After AutoConfig runs, some profile values will appear differently, as follows:

Table C-2

Before Autoconfig Runs	After Autoconfig Runs
%s_applcsf%/inbound/%s_contextname%	/u01/proddb/admin/inbound/cn
APPLCSF	/u01/proddb/admin
contextname	product name = cn

The *OSC: Multi Rollup Path* profile option is used to set up managerial rollups for a resource who is assigned the same role in multiple groups or multiple roles in the same group. If a resource is assigned a role in multiple groups, it must be the same role. This release of Oracle Incentive Compensation does not support rollup along multiple paths when the managers receiving the credit have different roles in the compensation groups along the rollup paths. This is because the application picks the role at random.

D.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 are upgrading 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 tasks 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 11.5.10 releases. Columns four and five list the Navigation and Screen Name in 11.5.10.

D.1.1 Financial

11.5.5			11.5.10	
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			11.5.10	
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			11.5.10	
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			11.5.10	
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)	New navigation flow.	Administration > Incentive > Collection	Collection - Transaction Sources
Menu bar > System > Collections	Collection and Mapping (Mapping tab)	New navigation flow.	Administration > Incentive > Collection > Mapping	Collection - Mapping

11.5.5			11.5.10	
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 Table	External Table 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 > Incentive > Collection > Queries > Parameter area	Collection - Queries

D.1.3 Tasks

11.5.5			11.5.10	
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.	Resource > Resources	Advanced Search
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Roles tab)	No change, still in Forms.	N/A	N/A
Menu bar > Tasks > Define Resources > Find button > Resource Details button	Resource (Groups tab)	No change, still in Forms.	N/A	N/A

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
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
Menu bar > Tasks > Define Groups	Define Groups (Parent Groups tab)	New navigation flow. Page is in HTML style.	Resource > Group > Hierarchy	Group Detail - Child and Parent Groups

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
Menu bar > Tasks > Define Groups	Define Groups (Child Groups tab)	New navigation flow. Page is in HTML style.	Resource > Group > 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 > Adjust > Search	Transactions
Tasks > Adjustments	Maintain Transactions (Advanced tab)	New navigation flow. Renamed field labels. Column display and sort selection.	Transaction > Adjustments > Show Advanced Search check box	Transactions > Show Advanced Search
Tasks > Adjustments > New button or Adjust Transaction button	Adjust Transactions (Commission Lines tab)	New navigation flow. New action buttons. New UI.	Transaction > Adjust > enter resource name	Transactions
Tasks > Adjustments > New button or Adjust Transaction button	Adjust Transactions (Transaction History tab)	New navigation flow. New action buttons. New UI.	Transaction > Adjust	Transactions
Tasks > Adjustments > New button or Adjust Transaction button	Adjust Transactions (Customer Address tab)	New navigation flow. New action buttons. New UI.	Transaction > Adjust	Transactions
Tasks > Adjustments > New button or Adjust Transaction button	Adjust Transactions (User Notes tab)	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transactions
Tasks > Adjustments > Adjust Transaction button > Move Credits button	Maintain Transactions > Move Credits	New navigation flow. New action buttons. New UI.	Transaction > Adjustments > Move Credits	Move Credits
Tasks > Adjustments > Adjust Transaction button > Share Credits button	Maintain Transactions > Share Credits	New navigation flow. New action buttons. New UI.	Transaction > Adjust	Transaction Summary

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
Tasks > Adjustments > Adjust Transaction button > Deal Split button	Splits	New navigation flow. New action buttons. New UI.	Transaction > Adjust > Split	Incentive Compensation: Split Transaction
Tasks > Adjustments > Adjust Transaction button > Deal Move button	Deal Move	New navigation flow. New action buttons. New UI.	Transaction > Adjustments	Transactions
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 Process Log
Tasks > Posting Details	Posting Details	New navigation flow. New UI. New fields.	Transaction > Payment > Analyst Payment Total	Worksheets
HTML UI > Reports	Reports	New navigation flow. New reports, renamed report, no Adjustments Report.	Transaction > Report	Summary of Compensation Reports
Tasks > Rate Dimensions	Rate Dimensions	New navigation flow. Add Update and Restore buttons.	Incentive > Rate > click name > Create	Rate Table Details - Dimensions
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

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
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	Transactions
Tasks > User Notifications	Notify Log	Replaced in HTML.	Transaction > Notification Log	Notify Log

D.1.4 Salespeople

11.5.5			11.5.10	
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
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

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
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 > select valid resource > 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]
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

11.5.5			11.5.10	
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	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
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 > Salespeople Search > Salesperson 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

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
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 > select 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	Resource Advanced Search
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			11.5.10	
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

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
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: <plan name>
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
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 - Accelerators and Transaction Factors

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
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	Plan Element Detail - 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 Definition
Compensation Plans icon > View by Formula > select a formula > Input tab	Formulas (Input tab)	New navigation flow. Details of the expression are on the Calculation Expression Details HTML page.	Incentive > Formula > click hyperlink in Name column > Expressions hyperlink	Formula Detail -- 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 > Output tab	Formulas (Output 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	Formula Detail - Expressions
Compensation Plan icon > View by Rate Tables	Rate Tables	New navigation flow. See Rate Table Details HTML pages.	Incentive > Rate	Rate Tables
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 Detail - Commission Rates
N/A	N/A	New HTML page.	Incentive > Rate > Formulas	Rate Table Details, Formula Assignments

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
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 Expression Details
N/A	N/A	New HTML page.	Incentive > Credit Rules	Credit Allocation Rules

D.1.6 Payment Setup

11.5.5			11.5.10	
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
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			11.5.10	
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			11.5.10	
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

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
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			11.5.10	
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	Payruns
Payment > Summary	Payrun Summary	New navigation flow.	Transaction > Payment > Click Payrun name	Payrun Summary: <payrun name>
Payment > Summary > select a total	Payrun Details	New navigation flow.	Transaction > Payment > Click Analyst Payrun Total hyperlink	Worksheets: <payrun name>

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
Payment > Summary > Payrun Details > select a total	Payment Transactions	New navigation flow.	Transaction > Payment > Worksheets > click Total Worksheet Amount hyperlink	Worksheet: <payrun name> <resource name>
Payment > Summary > Payrun Details > select Add a Payment Plan	Payment Plans	New navigation flow.	Transaction > Payment > Worksheets > 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 > > click Signoff Report hyperlink	Payrun Sign-off Report
Reports > Compensation	Summary of Compensation Reports	New navigation flow.	Transaction > Report	Summary of Compensation Reports
Reports > Compensation > Year To Date Summary > Salespeople Search Results > Salesperson Name	Year to Date Summary	New navigation flow.	Transaction > Report > Year to Date Summary > Salespeople Search > Salesperson Search Results > click name	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 > Salespeople Search > Salesperson Search Results > click name	Transaction Details Report

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
Reports > Compensation > Compensation Group Hierarchy Report > Salespeople Search Results > Salesperson Name	Compensation Group Hierarchy Report	New navigation flow.	Transaction > Report > Hierarchy Report > Salespeople Search > Salesperson Search Results > click name	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 Search > Click rule	Classification Rules Report
Reports > Compensation > Commission Summary Report	Commission Summary Report	New navigation flow.	Transaction > Report > Commission Summary	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. Name changed to Earnings Statement Report in 11.5.10.	Transaction > Report > Earnings Statement	Earnings Statement Report
Reports > Compensation > Unprocessed Transactions > Salespeople Search Results > Salesperson Name	Unprocessed Transactions	New navigation flow.	Transaction > Report > Unprocessed Transactions > Salespeople Search > Salesperson Search Results > click name	Unprocessed Transactions
N/A	N/A	New HTML page showing new Commission Statement report	Transaction > Commission Statement	Report: Commission Statement

D.1.10 Salesforce Planning/Incentive Planning in HTML

11.5.5			11.5.10	
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 > enter parameter > click Apply	Resource Search Results
Salesforce	Resource Details - Main	New navigation flow.	Resource > Planning > enter parameter > click Apply > 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 > enter parameter > click Apply > click Resource Name hyperlink > click Job Title hyperlink	Resource Details - 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 > enter parameter > click Apply > click Resource Name hyperlink > click On Target Earning hyperlink	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 > enter parameter > click Apply > click Resource Name hyperlink > click On Target Earning hyperlink > click Anchors hyperlink	Resource Details - Customized Anchors
Quota > Allocate	My Compensation Groups	New navigation flow.	Quota > Allocate	My Compensation Groups
Quota > Allocate	Quota Modeling Summary	New navigation flow.	Quota > Allocate > enter parameters > click Apply > click hyperlink in Name column	Quota Allocation Details

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
Quota > Allocate	Add To-be-hired	New navigation flow.	Quota > Allocate > enter parameters > click Apply > click hyperlink in Name column > click Add Vacancy button	Add Vacancy
Quota > Allocate	contract	New navigation flow.	Quota > Allocate > Allocate Contract	Allocate Contract
Quota > Allocate	Assign Quota	New navigation flow. New screen name.	Quota > Allocate > enter parameters > click Apply > click hyperlink in Name column > Allocation Details	Allocation Details - Quota and Pay Assignment
Quota > Allocate	Quota from Field	New navigation flow. New screen name.	Quota > Allocate > enter parameters > click Apply > click hyperlink in Name column > 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 > Process > Resources Found > click Name hyperlink	Compensation Plan Processing
Quota > Distribute	Distribute Contracts	New navigation flow.	Quota > Process > Resources Found > click Name hyperlink	Compensation Plan Processing
Quota > Activate	Activate Contracts	New navigation flow.	Quota > Process > Resources Found > click Name hyperlink	Compensation Plan Processing
Reports	Reports	New navigation flow.	Quota > Report	Reports

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
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
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

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
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
N/A	N/A	New subtab added to Quota tab in 11.5.10	Quota > Import	Import/Export
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 > Contract Text hyperlink	Agreement Details - Contract Text
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

11.5.5			11.5.10	
Navigation	Screen Name	Changes	Navigation	Screen Name
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 > Define Quota Anchors
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 > search for name and drill down on value in Name column	Resource Details - 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 > Agreement	Agreements

Responsibilities

E.1 Responsibilities in Oracle Incentive Compensation

People are assigned different responsibilities in Oracle Incentive Compensation to allow them appropriate access to the application. In the table below, the 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.

New in this release, the application checks before loading a page that is not accessible from Oracle Field Sales, to determine if the user has the proper responsibility to access the page. If the user is not permitted to view the page, an error message displays: "You are not authorized to access [jsp name]."

The Sales Compensation Payment Analyst is a new role type in this release. Use it whenever you define an analyst in Resource Manager for use in Oracle Incentive Compensation.

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

If you have analysts that were defined prior to this release that use a Sales Compensation role, remove that role and group member role and assign the Sales Compensation Payment Analyst role.

Also new in this release is the Sales Force User responsibility. This responsibility was designed to give resources to whom it is assigned access to the Compensation tab by itself. In previous releases of Oracle Incentive Compensation, if a resource did not have access to Oracle Field Sales, the system administrator had to create a new responsibility or add exclusions to an existing responsibility to allow access to

the tab exclusively. This responsibility enables resources to see these reports in Oracle Incentive Compensation:

- Year to Date Summary
- Quota Performance
- Commission Statement

OIC 11.5.10 (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
Sales Force User	NA

E.1.1 Tab Usage in Oracle Incentive Compensation 11.5.10

The table below shows the tabs in Oracle Incentive Compensation, along with their subtabs. If a responsibility has access to a tab or subtab, the word Yes appears in the column below its name.

Notes:

- The Reports tab is used only by the Incentive Compensation Payment and Incentive Compensation Reports responsibilities to view the set of reports normally accessed from the Report subtab of the Transaction tab.
- The Incentive Compensation Developer responsibility, not shown in the table, is used in the Forms environment only, and does not have access to the HTML environment.
- The Sales Force User responsibility, not shown in the table, has access to the features and reports on the Compensation tab in Oracle Field Sales, including

the redesigned Commission Statement report. However, the Sales Force User does not have access to any other features in Oracle Field Sales, and unlike users of Oracle Field Sales, does not have access to the Income Planner.

Tab Name	Subtab Name	IC Super User	IC Analyst	IC Payment	IC Reports	IP Analyst	IP Contract Approver	IP Finance Manager	IP Sales Manager
Home	NA	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Incentive	Agreement	Yes	No	No	No	Yes	No	No	No
Incentive	Plan	Yes	Yes	No	No	Yes	No	No	No
Incentive	Element	Yes	Yes	No	No	Yes	No	No	No
Incentive	Formula	Yes	Yes	No	No	Yes	No	No	No
Incentive	Rate	Yes	Yes	No	No	Yes	No	No	No
Incentive	Expression	Yes	Yes	No	No	Yes	No	No	No
Incentive	Credit Rules	Yes	Yes	No	No	No	No	No	No
Modeling	Agreement	Yes	No	No	No	Yes	No	No	No
Modeling	Comparison	Yes	No	No	No	Yes	No	No	No
Modeling	Performance	Yes	No	No	No	Yes	No	No	No
Resource	Planning	Yes	No	No	No	Yes	Yes	Yes	Yes
Resource	Resources	Yes	Yes	No	No	Yes	Yes	Yes	Yes
Resource	Role	Yes	Yes	No	No	Yes	No	No	No
Resource	Group	Yes	Yes	No	No	Yes	Yes	Yes	Yes
Quota	Allocate	Yes	No	No	No	Yes	No	Yes	Yes
Quota	Process	Yes	No	No	No	Yes	Yes	Yes	Yes
Quota	Report	Yes	No	No	No	Yes	Yes	Yes*	Yes**
Quota	Import	Yes	No	No	No	Yes	Yes	Yes	No
Transaction	Collect	Yes	Yes	No	No	No	No	No	No
Transaction	Import/Export	Yes	Yes	No	No	No	No	No	No
Transaction	Adjust	Yes	Yes	No	No	No	No	No	No

Tab Name	Subtab Name	IC Super User	IC Analyst	IC Payment	IC Reports	IP Analyst	IP Contract Approver	IP Finance Manager	IP Sales Manager
Transaction	Load	Yes	Yes	No	No	No	No	No	No
Transaction	Calculate	Yes	Yes	No	No	No	No	No	No
Transaction	Notification Log	Yes	Yes	No	No	No	No	No	No
Transaction	Payment	Yes	Yes	No	No	No	No	No	No
Transaction	Commission Statement	Yes	Yes	No	No	No	No	No	No
Transaction	Report	Yes	Yes	No	No	No	No	No	No
Requests	Collection	Yes	Yes	No	No	No	No	No	No
Requests	Transaction	Yes	Yes	No	No	No	No	No	No
Requests	Calculation	Yes	Yes	No	No	No	No	No	No
Requests	Payment	Yes	Yes	No	No	No	No	No	No
Requests	Allocation Transfer	Yes	Yes	No	No	No	No	No	No
Requests	Allocation Process	Yes	Yes	No	No	No	No	No	No
Product	All	Yes	Yes	No	No	Yes	Yes	Yes	Yes
Administration	All	Yes	Yes	No	No	Yes	No	No	No
Payment	NA	No	No	Yes	No	No	No	No	No
Reports	NA	No	No	Yes	Yes	No	No	No	No

* Incentive Planning Finance Manager has access set by Incentive Compensation Super User using the User Access page.

**Incentive Planning Sales Manager has access only to information regarding his or her direct reports.

External Formula Code Examples

Following are two examples with notes indicating the customization of the existing packages. The Spec code is shown first, with the Package Body following. Areas in the package body that can be customized for external packages are shown in boldface type. Notes of interest are displayed in *Italics*. The Spec code cannot be changed.

- [Section F.1, "Example 1"](#)
- [Section F.2, "Example 2"](#)

F.1 Example 1

F.1.1 Spec of Example 1

```
CREATE OR REPLACE PACKAGE cn_formula_10510_pkg AS

-- Procedure Name
--   get_input
-- Purpose
--   This procedure gets the input values
-- History
--   04-SEP-2001          APPS          Created
```

```

PROCEDURE get_input(p_commission_line_id NUMBER,
                   p_salesrep_id         NUMBER,
                   p_period_id           NUMBER,
                   p_quota_id            NUMBER,
                   p_srp_plan_assign_id  NUMBER,
                   p_processed_date       DATE,
                   x_mul_input_tbl        IN OUT
cn_formula_common_pkg.mul_input_tbl_type);

-- Procedure Name
--   get_perf
-- Purpose
--   This procedure is to accumulate performance measure.
-- History
--   04-SEP-2001          APPS          Created

FUNCTION get_perf(p_commission_line_id NUMBER,
                 p_salesrep_id         NUMBER,
                 p_period_id           NUMBER,
                 p_quota_id            NUMBER,
                 p_srp_plan_assign_id  NUMBER,
                 p_start_date           DATE) RETURN NUMBER;

-- Procedure Name
--   get_commission
-- Purpose
--   This procedure is to calculate the commission
-- History

```

```
--      04-SEP-2001          APPS      Created

FUNCTION get_commission(p_commission_line_id NUMBER,
                        p_salesrep_id        NUMBER,
                        p_period_id         NUMBER,
                        p_quota_id          NUMBER,
                        p_srp_plan_assign_id NUMBER,
                        p_rate              NUMBER) RETURN
NUMBER;

-- Procedure Name
--   calculate_quota
-- Purpose
--   This procedure is the hook to the calculation engine
-- History
--      04-SEP-2001          APPS      Created

PROCEDURE calculate_quota(p_srp_plan_assign_id  NUMBER,
                          p_salesrep_id        NUMBER,
                          p_period_id         NUMBER,
                          p_start_date        DATE,
                          p_quota_id          NUMBER,
                          p_process_all_flag   VARCHAR2,
                          p_intel_calc_flag    VARCHAR2,
                          p_calc_type         VARCHAR2,
                          x_latest_processed_date OUT DATE);

-- Procedure Name
```

Example 1

```
-- get_result
-- Purpose
-- This procedure is invoked if this formula is used as an
-- embeded formula
-- History
-- 24-SEP-01          APPS          Created

FUNCTION get_result(p_commission_line_id NUMBER) RETURN
NUMBER;

END cn_formula_10510_pkg ;
```

F.1.2 Body of Example 1

```
CREATE OR REPLACE PACKAGE BODY cn_formula_10510_pkg AS

g_commission_paid_ptd          NUMBER;
g_commission_paid_itd          NUMBER;
g_input_achieved_ptd           NUMBER;
g_input_achieved_itd           NUMBER;
g_output_achieved_ptd          NUMBER;
g_output_achieved_itd          NUMBER;
g_perf_achieved_ptd            NUMBER;
g_perf_achieved_itd            NUMBER;
g_intel_calc_flag              VARCHAR2(1);
g_calc_type                     VARCHAR2(30);
g_select_status_flag            VARCHAR2(30);

g_formula_id                    NUMBER := 10510;
```

```
g_number_dim                NUMBER := 3;
g_split_flag                VARCHAR2(1) := 'N';
g_trx_group_code            VARCHAR2(30) := 'INDIVIDUAL';
g_itd_flag                  VARCHAR2(1) := 'N';
g_output_achieved           NUMBER;

-- Procedure Name
--   get_input
-- Purpose
--   This procedure gets the input values
-- History
--   04-SEP-2001          APPS          Created

PROCEDURE get_input(p_commission_line_id NUMBER,
                   p_salesrep_id        NUMBER,
                   p_period_id          NUMBER,
                   p_quota_id           NUMBER,
                   p_srp_plan_assign_id NUMBER,
                   p_processed_date     DATE,
                   x_mul_input_tbl      IN OUT
cn_formula_common_pkg.mul_input_tbl_type)
IS
    l_input                NUMBER;

--Note: define the following local variables
l_input_string1         VARCHAR2(30);
l_input_string2         VARCHAR2(30);
```

```

--Note: you can define local variables and cursors to get
information

--      from the other tables or views as long as you are
sure that at

--      this point in time, those tables/views have the
correct information.

--      For example, you can get the commission_paid_itd
from another

--      plan element in the same compensation plan from cn_
srp_period_quotas

--      by the following query:

--      select commission_paid_itd
--      into l_comm
--      from cn_srp_period_quotas
--      where srp_plan_assign_id = p_srp_plan_assign_id
--      and quota_id = :quota_id
--      and period_id = p_period_id
BEGIN

--Note: modify the following SQL statement to get the input
values

select ch.transaction_amount, ch.attribute46, ch.attribute47
into l_input, l_input_string1, l_input_string2
from cn_commission_lines cl, cn_commission_headers ch
where cl.commission_line_id = p_commission_line_id
and ch.commission_header_id = cl.commission_header_id;

--Note: pass the input values to the corresponding array
element

l_input := nvl(l_input, 0);
x_mul_input_tbl(1).rate_dim_sequence := 1;

```

```
x_mul_input_tbl(1).input_string := l_input_string1;
x_mul_input_tbl(1).base_amount := l_input;

x_mul_input_tbl(2).rate_dim_sequence := 2;
x_mul_input_tbl(2).input_string := l_input_string2;
x_mul_input_tbl(2).base_amount := l_input;

x_mul_input_tbl(3).rate_dim_sequence := 3;
x_mul_input_tbl(3).input_amount := l_input;
x_mul_input_tbl(3).amount := l_input;

--Note: pass the total revenue (g_input_achieved_itd+l_
input)
--      as the base_amount instead of l_input
x_mul_input_tbl(3).base_amount := g_input_achieved_itd + l_
input;
EXCEPTION WHEN OTHERS THEN
    cn_message_pkg.debug('EXCEPTION IN GET_input, ' || sqlerrm);
    raise;
END get_input;

-- Procedure Name
-- get_perf
-- Purpose
-- This procedure is to accumulate performance measure.
-- History
-- 04-SEP-2001          APPS          Created
```

```
FUNCTION get_perf(p_commission_line_id NUMBER,
                 p_salesrep_id         NUMBER,
                 p_period_id           NUMBER,
                 p_quota_id            NUMBER,
                 p_srp_plan_assign_id  NUMBER,
                 p_start_date          DATE) RETURN NUMBER
IS
  l_perf          NUMBER;
BEGIN
  --Note: you can manipulate l_perf here
  select ch.transaction_amount
         into l_perf
         from cn_commission_lines cl, cn_commission_headers ch
         where cl.commission_line_id = p_commission_line_id
              and ch.commission_header_id = cl.commission_header_id;

  l_perf := nvl(l_perf, 0);
  return l_perf;
EXCEPTION WHEN OTHERS THEN
  cn_message_pkg.debug('EXCEPTION IN GET_PERF, ' || sqlerrm);
  raise;
END get_perf;

-- Procedure Name
--   get_commission
-- Purpose
--   This procedure is to calculate the commission
```

```
-- History
--   04-SEP-2001          APPS          Created

FUNCTION get_commission(p_commission_line_id NUMBER,
                        p_salesrep_id       NUMBER,
                        p_period_id        NUMBER,
                        p_quota_id         NUMBER,
                        p_srp_plan_assign_id NUMBER,
                        p_rate              NUMBER) RETURN
NUMBER
IS
    l_commission      NUMBER;
    l_output           NUMBER;
BEGIN
    --Note: you can manipulate l_commission here
    select p_rate*ch.transaction_amount
           into l_commission
           from cn_commission_lines cl, cn_commission_headers ch
           where cl.commission_line_id = p_commission_line_id
                 and ch.commission_header_id = cl.commission_header_id;

    l_commission := nvl(l_commission, 0);
    return l_commission;
EXCEPTION WHEN OTHERS THEN
    cn_message_pkg.debug('EXCEPTION IN GET_COMMISSION, ' ||
                        sqlerrm);
    raise;
END get_commission;
```

```

-- Procedure Name
--   calculate_quota
-- Purpose
--   This procedure is the hook to the calculation engine
-- History
--   04-SEP-2001          APPS          Created

PROCEDURE calculate_quota(p_srp_plan_assign_id  NUMBER,
                          p_salesrep_id         NUMBER,
                          p_period_id          NUMBER,
                          p_start_date         DATE,
                          p_quota_id           NUMBER,
                          p_process_all_flag   VARCHAR2,
                          p_intel_calc_flag    VARCHAR2,
                          p_calc_type         VARCHAR2,
                          x_latest_processed_date OUT DATE)

IS
    l_mul_input_tbl  cn_formula_common_pkg.mul_input_tbl_type;
    l_rate            NUMBER;
    l_rate_tier_id   NUMBER;
    l_tier_split     NUMBER;
    l_input           NUMBER;
    l_commission     NUMBER;
    l_perf            NUMBER;
    l_itd_target     NUMBER;
    l_itd_payment    NUMBER;
    l_processed_date DATE;

```

```
l_error_reason    VARCHAR2(150);
l_trx_rec_old     cn_formula_common_pkg.trx_rec_type;
l_trx_rec_new     cn_formula_common_pkg.trx_rec_type;
l_trx_rec_null    cn_formula_common_pkg.trx_rec_type;
```

```
CURSOR l_lines_csr IS
```

```
    SELECT cl.commission_line_id,
           cl.commission_header_id,
           cl.credited_salesrep_id salesrep_id,
           cl.srp_plan_assign_id,
           cl.quota_id,
           cl.processed_date,
           cl.processed_period_id,
           cl.pay_period_id,
           cl.commission_amount,
           cl.commission_rate,
           cl.rate_tier_id,
           cl.tier_split,
           cl.input_achieved,
           cl.output_achieved,
           cl.perf_achieved,
           cl.posting_status,
           cl.pending_status,
           cl.created_during,
           cl.trx_type,
           cl.error_reason,
           cl.status
```

```
    FROM cn_commission_lines cl,
```

```
        cn_commission_headers header
WHERE cl.credited_salesrep_id = p_salesrep_id
      AND cl.quota_id = p_quota_id
      AND cl.srp_plan_assign_id = p_srp_plan_assign_id
      AND cl.processed_period_id = p_period_id
      AND cl.processed_date >= p_start_date
      AND header.commission_header_id = cl.commission_header_
id
      AND substr(header.pre_processed_code, 4,1) = 'C'
      AND ((g_select_status_flag = 'PCX' and cl.status in
('POP',
'CALC', 'XCALC'))
          OR (g_select_status_flag = 'P' and cl.status =
'POP'))
      AND ((g_calc_type = 'FORECAST' and cl.trx_type =
'FORECAST')
          OR (g_calc_type = 'BONUS' and cl.trx_type =
'BONUS')
          OR (g_calc_type = 'COMMISSION' and cl.trx_type NOT
IN
('BONUS', 'FORECAST', 'GRP'))))
      ORDER by cl.processed_date asc, cl.commission_line_id
asc;
BEGIN
  g_intel_calc_flag := p_intel_calc_flag;
  g_calc_type := p_calc_type;

  cn_formula_common_pkg.calculate_init(p_srp_plan_assign_id,
                                       p_salesrep_id,
                                       p_period_id,
```

```

p_quota_id,
p_start_date,
p_process_all_flag,
g_intel_calc_flag,
g_calc_type,
g_trx_group_code,
g_itd_flag,
g_commission_paid_ptd,
g_commission_paid_itd,
g_input_achieved_ptd,
g_input_achieved_itd,
g_output_achieved_ptd,
g_output_achieved_itd,
g_perf_achieved_ptd,
g_perf_achieved_itd,
g_select_status_flag);

Open l_lines_csr;
LOOP
  l_trx_rec_new := l_trx_rec_null;
  FETCH l_lines_csr into l_trx_rec_old;
  EXIT WHEN l_lines_csr%notfound;
BEGIN
  get_input(l_trx_rec_old.commission_line_id,
           p_salesrep_id,
           p_period_id,
           p_quota_id,
           p_srp_plan_assign_id,
```

```

        l_trx_rec_old.processed_date,
        l_mul_input_tbl);

--Note: display l_mul_input_tbl(3).amount instead of
--      l_mul_input_tbl(1).amount because we add two
more inputs and the third
--      one actually have the numeric value
cn_message_pkg.debug('AFTER get_input ' || l_mul_input_
tbl(3).amount);

cn_formula_common_pkg.get_rates(p_salesrep_id,
                                p_srp_plan_assign_id,
                                p_period_id,
                                p_quota_id ,
                                g_split_flag,
                                g_itd_flag,
                                l_trx_rec_old.processed_
date,
                                g_number_dim,
                                l_mul_input_tbl,
                                g_formula_id,
                                l_rate,
                                l_rate_tier_id,
                                l_tier_split);

--Note: you can manipulate l_rate here. For example,
double the portion that exceeds
--      100% in the following way:
--      if (l_rate > 1) then

```

```
--          l_rate := 1 + 2*(l_rate - 1);
--          end if;
cn_message_pkg.debug('AFTER get_rates ' || l_rate);

l_commission := get_commission(l_trx_rec_old.commission_
line_id,

                                p_salesrep_id,
                                p_period_id,
                                p_quota_id,
                                p_srp_plan_assign_id,
                                l_rate);

--Note: you can manipulate l_commission here.
cn_message_pkg.debug('AFTER get_commission ' || l_
commission);

l_perf := get_perf(l_trx_rec_old.commission_line_id,
                    p_salesrep_id,
                    p_period_id,
                    p_quota_id,
                    p_srp_plan_assign_id,
                    l_trx_rec_old.processed_date);

cn_message_pkg.debug('AFTER get_perf' || l_perf);

--Note: l_input should be l_mul_input_tbl(3).input_
amount
--          instead of l_mul_input_tbl(1).input_amount
l_input := l_mul_input_tbl(3).input_amount;
```

```
x_latest_processed_date := l_trx_rec_old.processed_date;
l_trx_rec_new.status := 'CALC';
l_trx_rec_new.commission_amount := l_commission;
l_trx_rec_new.commission_rate := l_rate;
l_trx_rec_new.rate_tier_id := l_rate_tier_id ;
l_trx_rec_new.tier_split := l_tier_split ;
l_trx_rec_new.input_achieved := l_input ;
l_trx_rec_new.output_achieved := l_input;
l_trx_rec_new.perf_achieved := l_perf ;
EXCEPTION when others then
    l_trx_rec_new.error_reason := substr(sqlerrm,1,150);
    l_trx_rec_new.status := 'XCALC' ;
END;

cn_formula_common_pkg.update_trx(l_trx_rec_old, l_trx_rec_
new);
g_perf_achieved_ptd := g_perf_achieved_ptd+ l_perf;
g_perf_achieved_itd := g_perf_achieved_itd+ l_perf;
g_input_achieved_ptd := g_input_achieved_ptd + l_input;
g_input_achieved_itd := g_input_achieved_itd + l_input;
g_commission_paid_ptd := g_commission_paid_ptd + l_
commission;
g_commission_paid_itd := g_commission_paid_itd + l_
commission;
END LOOP;

CLOSE l_lines_csr;
```

```
cn_formula_common_pkg.calculate_roll(p_salesrep_id,
                                     p_period_id,
                                     p_quota_id,
                                     p_srp_plan_assign_id,
                                     p_calc_type,
                                     g_input_achieved_ptd,
                                     g_input_achieved_itd,
                                     g_output_achieved_ptd,
                                     g_output_achieved_itd,
                                     g_perf_achieved_ptd,
                                     g_perf_achieved_itd);

EXCEPTION
  when others then
    IF l_lines_csr%isopen THEN
      CLOSE l_lines_csr;
    END IF;

    cn_message_pkg.debug('Exception in calculate_quota' ||
                        sqlerrm);
    cn_debug.print_msg('calculate_quota<<', 1);
END calculate_quota;

-- Procedure Name
--   get_result
-- Purpose
--   This procedure is invoked if this formula is used as an
--   embeded formula
-- History
```

Example 1

```
--      24-SEP-01          APPS          Created

FUNCTION get_result(p_commission_line_id NUMBER) RETURN NUMBER
IS
  l_mul_input_tbl      cn_formula_common_pkg.mul_input_tbl_
type;
  l_rate               NUMBER;
  l_rate_tier_id       NUMBER;
  l_tier_split         NUMBER;
  l_commission         NUMBER;
  l_salesrep_id        NUMBER(15);
  l_period_id          NUMBER(15);
  l_quota_id           NUMBER(15);
  l_processed_date     DATE ;
  l_srp_plan_assign_id NUMBER(15);

  CURSOR l_comm_line_csr IS
    select credited_salesrep_id,
           processed_period_id,
           quota_id,
           srp_plan_assign_id,
           processed_date
    from cn_commission_lines
    where commission_line_id = p_commission_line_id;
BEGIN
  OPEN l_comm_line_csr ;
  FETCH l_comm_line_csr into l_salesrep_id, l_period_id, l_
quota_id,
  l_srp_plan_assign_id, l_processed_date;
```

```
CLOSE l_comm_line_csr;

get_input(p_commission_line_id,
         l_salesrep_id,
         l_period_id,
         l_quota_id,
         l_srp_plan_assign_id,
         l_processed_date,
         l_mul_input_tbl);

cn_formula_common_pkg.get_rates(l_salesrep_id,
                                l_srp_plan_assign_id,
                                l_period_id,
                                l_quota_id,
                                g_split_flag,
                                g_itd_flag,
                                l_processed_date,
                                g_number_dim,
                                l_mul_input_tbl,
                                g_formula_id,
                                l_rate,
                                l_rate_tier_id,
                                l_tier_split);

l_commission := get_commission(p_commission_line_id,
                               l_salesrep_id,
                               l_period_id,
                               l_quota_id,
```

```

                                l_srp_plan_assign_id,
                                l_rate);

    return l_commission;
    cn_debug.print_msg('get_result<<', 1);
END get_result;

END cn_formula_10510_pkg ;

```

F.2 Example 2

F.2.1 Spec for Example 2

```

--Note: this is a customized version of a system generated
package
--      for a group by formula and it has three inputs
CREATE OR REPLACE PACKAGE cn_formula_10356_pkg AS
--
-- Procedure Name
--  get_input
-- Purpose
--  This procedure is to calculate the input
-- History
--  24-OCT-01      APPS      Created
PROCEDURE get_input(p_commission_line_id NUMBER,
                   p_salesrep_id      NUMBER,
                   p_period_id        NUMBER,

```

```

        p_quota_id            NUMBER,
        p_srp_plan_assign_id  NUMBER,
        p_processed_date      DATE,
        x_mul_input_tbl       IN OUT cn_formula_
common_pkg.mul_input_tbl_type,
        p_endofinterval_flag VARCHAR2,
        p_start_period_id     NUMBER);

--Note: procedures get_perf and get_commission are also
removed because

--      they are computed in the customized procedure
calculate_quota

--      directly.

--
-- Procedure Name
--   calculate_quota
-- Purpose
--   This procedure is the hook to the calculation engine
-- History
--   24-OCT-01          APPS          Created
PROCEDURE calculate_quota(p_srp_plan_assign_id  NUMBER,
                          p_salesrep_id        NUMBER,
                          p_period_id          NUMBER,
                          p_start_date         DATE,
                          p_quota_id           NUMBER,
                          p_process_all_flag   VARCHAR2,
                          p_intel_calc_flag    VARCHAR2,
                          p_calc_type          VARCHAR2,
```

```

                                x_latest_processed_date OUT DATE);
--
-- Procedure Name
--   update_revclass_perf
-- Purpose
--   To accumulate performance by revenue classes in group by
case.This is
--   a call back when updating plan element subledger
-- History
--   24-OCT-01          APPS          Created
PROCEDURE update_revclass_perf(p_salesrep_id NUMBER,
                                p_period_id NUMBER,
                                p_quota_id NUMBER,
                                p_srp_plan_assign_id NUMBER);

END cn_formula_10356_pkg ;
```

F.2.2 Body of Example 2

```
--Note: this is a customized version of a system generated
package
--   for a group by formula and it has three inputs
CREATE OR REPLACE PACKAGE BODY cn_formula_10356_pkg AS
    g_commission_paid_ptd          NUMBER;
    g_commission_paid_itd          NUMBER;
    g_input_achieved_ptd           NUMBER;
    g_input_achieved_itd           NUMBER;
    g_output_achieved_ptd          NUMBER;
```

```

g_output_achieved_itd      NUMBER;
g_perf_achieved_ptd       NUMBER;
g_perf_achieved_itd       NUMBER;
g_intel_calc_flag         VARCHAR2(1);
g_calc_type               VARCHAR2(30);
g_select_status_flag      VARCHAR2(30);
g_formula_id              NUMBER := 10356 ;
g_number_dim              NUMBER := 3 ;
g_split_flag              VARCHAR2(1) := 'N' ;
g_itd_flag                VARCHAR2(1) := 'N' ;
g_output_achieved         NUMBER;

--
-- Procedure Name
--   get_input
-- Purpose
--   This procedure is to calculate the input
-- History
--   24-OCT-01          APPS          Created
PROCEDURE get_input(p_commission_line_id NUMBER,
                   p_salesrep_id       NUMBER,
                   p_period_id         NUMBER,
                   p_quota_id          NUMBER,
                   p_srp_plan_assign_id NUMBER,
                   p_processed_date    DATE,
                   x_mul_input_tbl     IN OUT cn_formula_
common_pkg.mul_input_tbl_type,

```

```

                                p_endofinterval_flag VARCHAR2,
                                p_start_period_id    NUMBER)
IS
    l_input          NUMBER;
    l_input_string1  VARCHAR2(30);
    l_input_string2  varchar2(30);
    l_itd_target     NUMBER;
BEGIN
    --Note: the code to compute the aggregated values is removed
because they
--      are computed in the customized procedure calculate_
quota.
    select ch.transaction_amount, ch.attribute3, ch.attribute1
           into l_input, l_input_string1, l_input_string2
           from cn_commission_headers ch, cn_commission_lines cl
           where cl.commission_line_id = p_commission_line_id
                 and ch.commission_header_id = cl.commission_header_id;

    l_input := nvl(l_input,0);

    x_mul_input_tbl(1).rate_dim_sequence := 1;
    x_mul_input_tbl(1).input_string := l_input_string1;
    x_mul_input_tbl(1).base_amount := l_input;

    x_mul_input_tbl(2).rate_dim_sequence := 2;
    x_mul_input_tbl(2).input_string := l_input_string2;
    x_mul_input_tbl(2).base_amount := l_input;

```

```

x_mul_input_tbl(3).rate_dim_sequence := 3;
x_mul_input_tbl(3).input_amount := l_input;
x_mul_input_tbl(3).amount := l_input;
EXCEPTION WHEN OTHERS THEN
    cn_message_pkg.debug('EXCEPTION IN GET_input, ' || Sqlerrm);
    raise;
END get_input;

```

--Note: procedures get_perf and get_commission are also removed because

-- they are computed in the customized procedure calculate_quota

-- directly.

--

-- Procedure Name

-- calculate_quota

-- Purpose

-- This procedure is the hook to the calculation engine

-- History

-- 24-OCT-01 APPS Created

```

PROCEDURE calculate_quota(p_srp_plan_assign_id NUMBER,
                        p_salesrep_id NUMBER,
                        p_period_id NUMBER,
                        p_start_date DATE,
                        p_quota_id NUMBER,
                        p_process_all_flag VARCHAR2,
                        p_intel_calc_flag VARCHAR2,

```

```

p_calc_type          VARCHAR2,
x_latest_processed_date OUT DATE)

```

```
IS
```

```

  l_mul_input_tbl          cn_formula_common_pkg.mul_input_
tbl_type;
  l_rate                   NUMBER;
  l_rate_tier_id           NUMBER;
  l_tier_split             NUMBER;
  l_input                  NUMBER;
  l_commission             NUMBER;
  l_perf                   NUMBER;
  l_itd_target             NUMBER;
  l_itd_payment            NUMBER;
  l_processed_date         DATE;
  l_error_reason           VARCHAR2(150);
  l_trx_rec_old            cn_formula_common_pkg.trx_rec_type;
  l_trx_rec_new            cn_formula_common_pkg.trx_rec_type;
  l_trx_rec_null           cn_formula_common_pkg.trx_rec_
type;
  l_endofinterval_flag    VARCHAR2(1);
  l_start_period_id       NUMBER(15);
  l_grp_trx_rec            cn_formula_common_pkg.trx_rec_type;

```

```
CURSOR l_lines_csr IS
```

```

  SELECT cl.commission_line_id,
         cl.commission_header_id,
         cl.credited_salesrep_id salesrep_id,

```

```
        cl.srp_plan_assign_id,
        cl.quota_id,
        cl.processed_date,
        cl.processed_period_id,
        cl.pay_period_id,
        cl.commission_amount,
        cl.commission_rate,
        cl.rate_tier_id ,
        cl.tier_split,
        cl.input_achieved ,
        cl.output_achieved,
        cl.perf_achieved,
        cl.posting_status,
        cl.pending_status,
        cl.created_during,
        cl.trx_type,
        cl.error_reason,
        cl.status
FROM cn_commission_lines cl,
     cn_commission_headers header
WHERE cl.credited_salesrep_id = p_salesrep_id
      AND cl.quota_id = p_quota_id
      AND cl.srp_plan_assign_id = p_srp_plan_assign_id
      AND cl.processed_period_id = p_period_id
      AND cl.processed_date >= p_start_date
      AND header.commission_header_id = cl.commission_header_
id
      AND substr(header.pre_processed_code, 4,1) = 'C'
```

```

        AND ((g_select_status_flag = 'PCX' and cl.status in
('POP', 'CALC', 'XCALC')) OR
            (g_select_status_flag = 'P' and cl.status =
'POP'))
        AND ((g_calc_type = 'FORECAST' and cl.trx_type =
'FORECAST') OR
            (g_calc_type = 'BONUS' and cl.trx_type = 'BONUS'))
OR
        (g_calc_type = 'COMMISSION' and cl.trx_type NOT IN
('BONUS', 'FORECAST', 'GRP'))
    order by cl.processed_date, cl.commission_line_id;
BEGIN
    g_intel_calc_flag := p_intel_calc_flag;
    g_calc_type := p_calc_type;

    cn_formula_common_pkg.calculate_init(p_srp_plan_assign_id,
                                        p_salesrep_id,
                                        p_period_id,
                                        p_quota_id,
                                        p_start_date,
                                        p_process_all_flag,
                                        g_intel_calc_flag,
                                        g_calc_type,
                                        g_commission_paid_ptd,
                                        g_commission_paid_itd,
                                        g_input_achieved_ptd,
                                        g_input_achieved_itd,
                                        g_output_achieved_ptd,
                                        g_output_achieved_itd,

```

```
g_perf_achieved_ptd,  
g_perf_achieved_itd,  
g_select_status_flag);  
  
l_endofinterval_flag := 'N';  
  
--Note: the code in the following loop is simplified. Its  
sole purpose is to  
--      set the status of each transaction to CALC if there  
is no error in  
--      calling get_input. If there is error, the status is  
set to XCALC.  
Open l_lines_csr;  
LOOP  
    l_trx_rec_new := l_trx_rec_null;  
    FETCH l_lines_csr into l_trx_rec_old;  
    EXIT WHEN l_lines_csr%notfound;  
    BEGIN  
        get_input(l_trx_rec_old.commission_line_id,  
                p_salesrep_id,  
                p_period_id,  
                p_quota_id,  
                p_srp_plan_assign_id,  
                p_start_date,  
                l_mul_input_tbl,  
                l_endofinterval_flag,  
                null);  
        l_commission := 0;  
        l_perf := 0;
```

```
        x_latest_processed_date := l_trx_rec_old.processed_date;
        l_trx_rec_new.status := 'CALC';
    EXCEPTION when others then
        l_trx_rec_new.error_reason := substr(sqlerrm,1,150);
        l_trx_rec_new.status := 'XCALC' ;
    END;

    cn_formula_common_pkg.update_trx(l_trx_rec_old, l_trx_rec_
new) ;
    END LOOP;
    CLOSE l_lines_csr;

    -- get the beginning of the interval
    l_start_period_id := cn_formula_common_pkg.get_start_period_
id(p_quota_id, p_period_id);

    -- check if it is the end of the interval
    IF cn_formula_common_pkg.EndOfInterval(p_quota_id, p_period_
id) THEN
        l_endofinterval_flag := 'Y';
    END IF;

    -- get the end_date of the interval
    SELECT end_date into l_processed_date
        FROM cn_period_statuses
        WHERE period_id = p_period_id;

    --Note: the following is the customized code to compute the
total commission. get_rates is called
```

```
--      more than once. You can write any code you wish to
compute the right commission

declare
    cursor totals is
        select ch.attribute3, ch.attribute1, sum(transaction_
amount) revenue
            from cn_commission_headers ch, cn_commission_lines cl
        where cl.credited_salesrep_id = p_salesrep_id
            and cl.srp_plan_assign_id = p_srp_plan_assign_id
            and cl.quota_id = p_quota_id
            and ch.commission_header_id = cl.commission_header_id
            and cl.processed_period_id between l_start_period_id
and p_period_id
            and cl.status = 'CALC'
            and ((g_calc_type = 'FORECAST' and cl.trx_type =
'FORECAST') or
                (g_calc_type = 'BONUS' and cl.trx_type =
'BONUS') or
                (g_calc_type = 'COMMISSION' and cl.trx_type not
in ('BONUS', 'FORECAST', 'GRP')))
            group by ch.attribute3, ch.attribute1;
begin
    l_commission := 0;
    l_perf := 0;
    for total in totals loop
        l_input := nvl(total.revenue,0);
        l_mul_input_tbl(1).rate_dim_sequence := 1;
        l_mul_input_tbl(1).input_string := total.attribute3;
        l_mul_input_tbl(1).base_amount := l_input;
```

```
l_mul_input_tbl(2).rate_dim_sequence := 2;
l_mul_input_tbl(2).input_string := total.attribute1;
l_mul_input_tbl(2).base_amount := l_input;

l_mul_input_tbl(3).rate_dim_sequence := 3;
l_mul_input_tbl(3).input_amount := l_input;
l_mul_input_tbl(3).amount := l_input;
l_mul_input_tbl(3).base_amount := l_input;

cn_formula_common_pkg.get_rates(p_salesrep_id,
                                p_srp_plan_assign_id,
                                p_period_id,
                                p_quota_id,
                                g_split_flag,
                                g_itd_flag,
                                l_processed_date,
                                g_number_dim,
                                l_mul_input_tbl,
                                g_formula_id,
                                l_rate,
                                l_rate_tier_id,
                                l_tier_split);

cn_message_pkg.debug('AFTER get_rates ' || l_rate);

l_commission := l_commission + l_rate*l_input;
l_perf := l_perf + l_input;
end loop;
```

```
l_grp_trx_rec.status := 'CALC';
l_grp_trx_rec.commission_amount := l_commission ;
l_grp_trx_rec.commission_rate := l_commission/l_perf;
l_grp_trx_rec.rate_tier_id := l_rate_tier_id;
l_grp_trx_rec.tier_split := l_tier_split ;
l_grp_trx_rec.input_achieved := g_input_achieved_itd;
l_grp_trx_rec.output_achieved:= g_output_achieved_itd;
l_grp_trx_rec.perf_achieved := l_perf;
EXCEPTION WHEN OTHERS THEN
    l_grp_trx_rec.status := 'XCALC';
    l_grp_trx_rec.error_reason := substr(sqlerrm, 1, 150);
END;

-- if it is the end of the interval, create a GRP type
transaction to record
-- the calculated commission.
IF (l_endofinterval_flag = 'Y') THEN
    l_grp_trx_rec.salesrep_id := p_salesrep_id;
    l_grp_trx_rec.created_during := 'CALC';
    l_grp_trx_rec.srp_plan_assign_id := p_srp_plan_assign_id;
    l_grp_trx_rec.quota_id := p_quota_id;
    l_grp_trx_rec.processed_date := l_processed_date;
    l_grp_trx_rec.processed_period_id := p_period_id;
    l_grp_trx_rec.pay_period_id := cn_api.get_pay_period(p_
salesrep_id => p_salesrep_id,
                                                                    p_
date          => l_processed_date);
    l_grp_trx_rec.posting_status := 'UNPOSTED';
    l_grp_trx_rec.pending_status := null;
```

```
    l_grp_trx_rec.trx_type := 'GRP' ;

    cn_formula_common_pkg.create_trx(l_grp_trx_rec);
END IF;

g_perf_achieved_ptd := l_perf - g_perf_achieved_itd;
g_perf_achieved_itd := l_perf;
g_input_achieved_ptd := l_input - g_input_achieved_itd ;
g_input_achieved_itd := l_input;
g_commission_paid_ptd := l_commission - g_commission_paid_
itd;
g_commission_paid_itd := l_commission;

cn_formula_common_pkg.calculate_roll(p_salesrep_id,
                                     p_period_id,
                                     p_quota_id,
                                     p_srp_plan_assign_id,
                                     p_calc_type,
                                     g_input_achieved_ptd,
                                     g_input_achieved_itd,
                                     g_output_achieved_ptd,
                                     g_output_achieved_itd,
                                     g_perf_achieved_ptd,
                                     g_perf_achieved_itd);

EXCEPTION
    when others then
        IF (l_lines_csr%isopen) THEN
            CLOSE l_lines_csr;
```

```
        END IF;
        cn_message_pkg.debug('Exception in calculate_quota' ||
        Sqlerrm);
        cn_debug.print_msg('calculate_quota<<', 1);
    END calculate_quota;

--
-- Procedure Name
--   update_revclass_perf
-- Purpose
--   To accumulate performance by revenue classes in group by
case.This is
--   a call back when updating plan element subledger
-- History
--   24-OCT-01          APPS          Created
PROCEDURE update_revclass_perf(p_salesrep_id NUMBER,
                               p_period_id NUMBER,
                               p_quota_id NUMBER,
                               p_srp_plan_assign_id NUMBER)
IS
    l_perf          NUMBER;

    CURSOR l_rev_classes_csr IS
        SELECT revenue_class_id, srp_per_quota_rc_id
            FROM cn_srp_per_quota_rc rc
           WHERE rc.srp_plan_assign_id = p_srp_plan_assign_id
              AND rc.salesrep_id = p_salesrep_id
              AND rc.period_id = p_period_id
```

```
        AND rc.quota_id = p_quota_id;
BEGIN
  FOR l_rev_class IN l_rev_classes_csr LOOP
    select sum(ch.transaction_amount)
       into l_perf
    from cn_commission_headers ch, cn_commission_lines cl
   where cl.credited_salesrep_id = p_salesrep_id
        and cl.srp_plan_assign_id = p_srp_plan_assign_id
        and cl.quota_id = p_quota_id
        and ch.commission_header_id = cl.commission_header_id
        and cl.status = 'CALC' and ((g_calc_type = 'FORECAST'
        and cl.trx_type = 'FORECAST') or (g_calc_type =
'BONUS'
        and cl.trx_type = 'BONUS') or (g_calc_type =
'COMMISSION'
        and cl.trx_type not in ('BONUS', 'FORECAST', 'GRP')))
        and cl.processed_period_id = p_period_id
        and ch.revenue_class_id = l_rev_class.revenue_class_id
    ;

    l_perf := nvl(l_perf, 0);

    UPDATE cn_srp_per_quota_rc
       SET period_to_date = l_perf
    WHERE srp_per_quota_rc_id = l_rev_class.srp_per_quota_rc_
id;
  END LOOP;

  cn_debug.print_msg('update_revclass_perf<<', 1);
```

```
END update_revclass_perf;
```

```
END cn_formula_10356_pkg ;
```

Customized Summarization Code Examples

In Chapter 9, summarized transactions are discussed. If you want to use customized code, you must provide the package body `cn_aggrt_trx_pkg`. Examples are shown below.

G.1 Specifications for the Examples

```
PACKAGE cn_aggrt_trx_pkg AUTHID CURRENT_USER AS
-- $Header: cnagtrxs.pls ship $

-- API name: aggregate_trx
-- When the profile 'Roll Summarized Transactions' is set to 'Yes' and
the profile
-- 'Customized summarization' is set to 'Yes', the following procedure
will be executed at
-- the beginning of the rollup phase to summarize transactions.
PROCEDURE aggregate_trx(p_physical_batch_id IN NUMBER);

END cn_aggrt_trx_pkg;
```

Package Body for the examples:

```
PACKAGE BODY cn_aggrt_trx_pkg AS
-- $Header: cnagtrxb.pls 115.0 2002/02/14 23:00:01 arkrishn noship $

    G_PKG_NAME                CONSTANT VARCHAR2(30) :=
'CN_AGGRT_TRX_PKG';
    G_FILE_NAME                CONSTANT VARCHAR2(12) := 'cnagtrxb.pls';

    G_LAST_UPDATE_DATE        DATE      := sysdate;
    G_LAST_UPDATED_BY         NUMBER    := fnd_global.user_id;
    G_CREATION_DATE           DATE      := sysdate;
```

```
G_CREATED_BY          NUMBER := fnd_global.user_id;
G_LAST_UPDATE_LOGIN  NUMBER := fnd_global.login_id;
```

```
G_ROWID              VARCHAR2(30);
G_PROGRAM_TYPE       VARCHAR2(30);
g_system_rollup_flag VARCHAR2(1);
g_roll_sum_trx_flag  VARCHAR2(1);
g_srp_validation_flag VARCHAR2(1);
g_mode               VARCHAR2(30);
g_event_log_id       NUMBER(15);
```

```
type num_tbl_type is table of number index by binary_integer;
type date_tbl_type is table of date index by binary_integer;
type str_tbl_type is table of varchar2(30) index by binary_integer;
```

```
PROCEDURE aggregate_trx(p_physical_batch_id IN NUMBER) IS
```

```
    rep_ids          num_tbl_type;
    header_ids       num_tbl_type;
    rollup_dates     date_tbl_type;
    group_ids        num_tbl_type;
    rev_class_ids    num_tbl_type;
    trx_types        str_tbl_type;
    amounts          num_tbl_type;
    units            num_tbl_type;
    processed_dates  date_tbl_type;
    period_ids       num_tbl_type;
    tca_amounts      num_tbl_type;
```

```
    l_start_date DATE;
    l_end_date DATE;
    l_start_period_id NUMBER;
```

```
    cursor sum_trxs is
        select ch.direct_salesrep_id,
               ch.processed_period_id,
               ch.processed_date,
               nvl(ch.rollup_date, ch.processed_date),
               ch.comp_group_id,
               ch.revenue_class_id,
               ch.trx_type,
               sum(ch.transaction_amount),
               sum(ch.quantity),
               sum(ch.attribute58)
        from cn_commission_headers ch,
```

```

        cn_process_batches pb
WHERE pb.physical_batch_id = p_physical_batch_id
      AND ch.direct_salesrep_id = pb.salesrep_id
      and ch.processed_date BETWEEN pb.start_date AND pb.end_date
      AND ch.status = 'CLS'
      -- this might give better performance
      AND ch.revenue_class_id not in
        (SELECT revenue_class_id
         FROM CN_REVENUE_CLASSES CRCA
         WHERE UPPER(NAME) LIKE 'EXA%MRC')
group by ch.direct_salesrep_id,
         ch.processed_period_id,
         ch.processed_date,
         nvl(ch.rollup_date, ch.processed_date),
         ch.comp_group_id,
         ch.revenue_class_id,
         ch.trx_type;

BEGIN

  open sum_trxs;
  fetch sum_trxs
  bulk collect into
    rep_ids,
    period_ids,
    processed_dates,
    rollup_dates,
    group_ids,
    rev_class_ids,
    trx_types,
    amounts,
    units,
    tca_amounts;
  close sum_trxs;

  IF rep_ids.count > 0 THEN
    forall i in rep_ids.first..rep_ids.last
      insert into cn_commission_headers
        (commission_header_id,
         direct_salesrep_id,
         processed_date,
         processed_period_id,
         trx_type,
         status,
         rollup_date,
         comp_group_id,

```

```

revenue_class_id,
transaction_amount,
quantity,
        attribute36,
        attribute49,
        attribute57,
pre_processed_code,
parent_header_id,
creation_date,
created_by)
        values
        (cn_commission_headers_s.nextval,
rep_ids(i),
processed_dates(i),
period_ids(i),
trx_types(i),
'CLS_SUM',
rollup_dates(i),
group_ids(i),
rev_class_ids(i),
amounts(i),
units(i),
        tca_amounts(i),
        1,
        1,
'CRPC',
-1,
sysdate,
g_created_by)
        returning commission_header_id bulk collect INTO header_ids;

forall i IN rep_ids.first..rep_ids.last
UPDATE cn_commission_headers
        SET parent_header_id = header_ids(i)
        WHERE direct_salesrep_id = rep_ids(i)
        AND processed_period_id= period_ids(i)
        AND processed_date = processed_dates(i)
        AND nvl(rollup_date, processed_date) = rollup_dates(i)
        AND nvl(comp_group_id, -999999) = nvl(group_ids(i), -999999)
        AND revenue_class_id = rev_class_ids(i)
        AND trx_type = trx_types(i)
        AND status = 'CLS';
END IF;

update cn_commission_headers

```

```

        set status = 'CLS_SUM',
        parent_header_id = commission_header_id
    where commission_header_id in
        (select ch.commission_header_id
         from cn_commission_headers ch,
              cn_process_batches pb
         where pb.physical_batch_id = p_physical_batch_id
              and ch.direct_salesrep_id = pb.salesrep_id
              and ch.processed_date BETWEEN pb.start_date AND
pb.end_date
         and ch.status = 'CLS'
         and ch.revenue_class_id in
         (SELECT revenue_class_id
          FROM CN_REVENUE_CLASSES CRCA
          WHERE UPPER(NAME) LIKE 'EXA%MRC'));

    END;
END CN_AGGRT_TRX_PKG;

```

G.2 The Examples

To customize the code, use one of the three examples below as a basis and make only the changes you need. Then, add the code that follows example 3.

PACKAGE BODY cn_aggrt_trx_pkg AS Examples to Customize the Summarization Code

1. To add a summarizing criterion, for example, attribute12, add attribute12 into select and group by of the summarization SQL, and modify the insert and update statements accordingly.

```

cursor sum_trxs is
    select ch.direct_salesrep_id,
           ch.processed_period_id,
           ch.processed_date,
           nvl(ch.rollup_date, ch.processed_date),
           ch.comp_group_id,
           ch.revenue_class_id,
           ch.trx_type,
           ch.attribute12, --add attribute12
           sum(ch.transaction_amount),
           sum(ch.quantity)
    from cn_commission_headers ch,
         cn_process_batches pb
    WHERE pb.physical_batch_id = p_physical_batch_id

```

```

AND ch.direct_salesrep_id = pb.salesrep_id
and ch.processed_date BETWEEN pb.start_date AND pb.end_date
AND ch.status = 'CLS'
group by ch.direct_salesrep_id,
        ch.processed_period_id,
        ch.processed_date,
        nvl(ch.rollup_date, ch.processed_date),
        ch.comp_group_id,
        ch.revenue_class_id,
        ch.trx_type,
        ch.attribute12; -- add attribute12

```

2. To get the total value of an attribute column, for example, attribute13, add `sum(attribute13)` into the select part. This time, attribute13 is not the summarizing criteria and should not be added to the group by clause. Modify the insert statement accordingly.

```

cursor sum_trxs is
select ch.direct_salesrep_id,
       ch.processed_period_id,
       ch.processed_date,
       nvl(ch.rollup_date, ch.processed_date),
       ch.comp_group_id,
       ch.revenue_class_id,
       ch.trx_type,
       sum(ch.transaction_amount),
       sum(ch.quantity),
       sum(attribute13) -- add sum(attribute13)
from   cn_commission_headers ch,
       cn_process_batches pb
WHERE  pb.physical_batch_id = p_physical_batch_id
AND    ch.direct_salesrep_id = pb.salesrep_id
and    ch.processed_date BETWEEN pb.start_date AND pb.end_date
AND    ch.status = 'CLS'
group by ch.direct_salesrep_id,
        ch.processed_period_id,
        ch.processed_date,
        nvl(ch.rollup_date, ch.processed_date),
        ch.comp_group_id,
        ch.revenue_class_id,
        ch.trx_type;

```

3. If transactions of one kind need to be summarized differently from transactions of another kind, use two separate SQL statements to do it. For example, transactions of revenue_class_id in list1 are summarized differently from transactions of revenue_class_id in list2. Modify the insert and update statements (or have two insert/update statements if needed).

```
-- cursor for revenue_class_ids in list1
cursor sum_trxs1 is
  select ch.direct_salesrep_id,
         ch.processed_period_id,
         ch.processed_date,
         nvl(ch.rollup_date, ch.processed_date),
         ch.comp_group_id,
         ch.revenue_class_id,
         ch.trx_type,
         sum(ch.transaction_amount),
         sum(ch.quantity)
  from cn_commission_headers ch,
       cn_process_batches pb
 WHERE pb.physical_batch_id = p_physical_batch_id
       AND ch.direct_salesrep_id = pb.salesrep_id
       and ch.processed_date BETWEEN pb.start_date AND pb.end_date
       AND ch.status = 'CLS'
       and ch.revenue_class_id in (list1) -- constraint on
revenue_class_id
  group by ch.direct_salesrep_id,
         ch.processed_period_id,
         ch.processed_date,
         nvl(ch.rollup_date, ch.processed_date),
         ch.comp_group_id,
         ch.revenue_class_id,
         ch.trx_type;

-- cursor for revenue_class_ids in list2
cursor sum_trxs2 is
  select ch.direct_salesrep_id,
         ch.processed_period_id,
         ch.processed_date,
         nvl(ch.rollup_date, ch.processed_date),
         ch.comp_group_id,          ch.revenue_class_id,
         ch.trx_type,
         ch.attribute24,
         sum(ch.transaction_amount),
```

```

        sum(ch.quantity),
        sum(ch.attribute15)
    from cn_commission_headers ch,
        cn_process_batches pb
    WHERE pb.physical_batch_id = p_physical_batch_id
        AND ch.direct_salesrep_id = pb.salesrep_id
        and ch.processed_date BETWEEN pb.start_date AND pb.end_date
        AND ch.status = 'CLS'
        and ch.revenue_class_ids in (list2) -- constraint on
revenue_class_ids
    group by ch.direct_salesrep_id,
            ch.processed_period_id,
            ch.processed_date,
            nvl(ch.rollup_date, ch.processed_date),
            ch.comp_group_id,
            ch.revenue_class_id,
            ch.trx_type,
            ch.attribute24;

```

This part of the code is used in all of the three customizations above. Add the code after the code you customized. You can change the variables in the lefthand column to suit your requirements, but you should leave the rest of the code as it is.

```

-- type declaration
type num_tbl_type is table of number index by binary_integer;
type date_tbl_type is table of date index by binary_integer;
type str_tbl_type is table of varchar2(30) index by binary_integer;

PROCEDURE aggregate_trx(p_physical_batch_id IN NUMBER) IS
    -- declare PL/SQL tables to store the aggregation result
    rep_ids          num_tbl_type;
    header_ids       num_tbl_type;
    rollup_dates     date_tbl_type;
    group_ids        num_tbl_type;
    rev_class_ids    num_tbl_type;
    trx_types        str_tbl_type;
    amounts          num_tbl_type;
    units            num_tbl_type;
    processed_dates  date_tbl_type;
    period_ids       num_tbl_type;

    g_created_by     NUMBER := fnd_global.user_id;
    g_creation_date  date   := sysdate;

```

```
-- SQL to summarize transactions
cursor sum_trxs is
  select ch.direct_salesrep_id,
         ch.processed_period_id,
         ch.processed_date,
         nvl(ch.rollup_date, ch.processed_date),
         ch.comp_group_id,
         ch.revenue_class_id,
         ch.trx_type,
         sum(ch.transaction_amount),
         sum(ch.quantity)
  from cn_commission_headers ch,
       cn_process_batches pb
 WHERE pb.physical_batch_id = p_physical_batch_id
       AND ch.direct_salesrep_id = pb.salesrep_id
       and ch.processed_date BETWEEN pb.start_date AND pb.end_date
       AND ch.status = 'CLS'
 group by ch.direct_salesrep_id,
         ch.processed_period_id,
         ch.processed_date,
         nvl(ch.rollup_date, ch.processed_date),
         ch.comp_group_id,
         ch.revenue_class_id,
         ch.trx_type;

BEGIN
  -- fetch the summarized transactions into PL/SQL tables
  open sum_trxs;
  fetch sum_trxs bulk collect into rep_ids, period_ids,
  processed_dates, rollup_dates,
  group_ids,
  rev_class_ids, trx_types, amounts, units;
  close sum_trxs;

  IF rep_ids.count > 0 THEN
    -- insert summarized transactions into cn_commission_headers
    -- summarized transactions' status is CLS_SUM
    forall i in rep_ids.first..rep_ids.last
      insert into cn_commission_headers
        (commission_header_id,
         direct_salesrep_id,
         processed_date,
         processed_period_id,
         trx_type,
         status,
```

```

        rollup_date,
        comp_group_id,
        revenue_class_id,
        transaction_amount,
        quantity,
        pre_processed_code,
        parent_header_id,
        creation_date,
        created_by)
values
(cn_commission_headers_s.nextval,
 rep_ids(i),
 processed_dates(i),
 period_ids(i),
 trx_types(i),
 'CLS_SUM',
 rollup_dates(i),
 group_ids(i),
 rev_class_ids(i),
 amounts(i),
 units(i),
 'CRPC',
 -1,
 g_creation_date,
 g_created_by)
returning commission_header_id bulk collect INTO header_ids;

-- set original transactions' parent_header_id
-- original transactions remain in CLS status
forall i IN rep_ids.first..rep_ids.last
UPDATE cn_commission_headers
    SET parent_header_id = header_ids(i)
WHERE direct_salesrep_id = rep_ids(i)
    AND processed_period_id= period_ids(i)
    AND processed_date = processed_dates(i)
    AND nvl(rollup_date, processed_date) = rollup_dates(i)
    AND nvl(comp_group_id, -999999) = nvl(group_ids(i), -999999)
    AND revenue_class_id = rev_class_ids(i)
    AND trx_type = trx_types(i)
    AND status = 'CLS';
END IF;
end;

END CN_AGGRT_TRX_PKG;
```

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