

**Oracle® Incentive Compensation Analytics for Oracle  
Data Integrator**

User and Implementation Guide

Release 12.1

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Oracle Incentive Compensation Analytics for Oracle Data Integrator User and Implementation Guide, Release 12.1

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# Contents

**Send Us Your Comments**

**Preface**

## **1 Introduction to Oracle Incentive Compensation Analytics for Oracle Data Integrator**

Oracle Incentive Compensation Analytics for Oracle Data Integrator Overview.....	1-1
Technology Overview.....	1-2
Architecture Overview.....	1-2
Datamart Overview.....	1-3
Plan Modeling Overview.....	1-3
Dashboards and Reports Overview.....	1-4

## **2 Oracle Incentive Compensation Analytics for ODI Responsibilities**

Oracle Incentive Compensation Analytics for ODI Responsibilities.....	2-1
Sales Manager.....	2-1
Plan Administrator/Compensation Manager.....	2-3
Mapping between Dashboard and User.....	2-3
Security.....	2-5

## **3 Dimensions and Facts**

OIC Analytics for ODI Dimensions.....	3-1
OIC Analytics for ODI Facts.....	3-3
Currency.....	3-4

## **4 Process Flow**

Handling Time Periods.....	4-1
ETL Processing.....	4-1
Incremental Copy.....	4-4
Flattened Hierarchy Data Structure.....	4-5
Product Hierarchy Versioning.....	4-6
Salesperson Quota Distribution.....	4-6

## **5 Compensation Cost Summary Dashboard**

Overview of Compensation Cost Summary Dashboard.....	5-1
Compensation Cost.....	5-1
Compensation Summary by Quarter Report.....	5-2

## **6 Plan Performance Summary Dashboard**

Overview of Plan Performance Summary Dashboard.....	6-1
Attainment Summary by Quarter Report.....	6-1
Incentive Investment Matrix Report.....	6-2
Attainment versus Quota by Plan Report .....	6-2

## **7 Sales Manager Performance Summary Dashboard**

Sales Manager Performance Summary Dashboard Overview.....	7-1
Sales Person Ranking Report.....	7-1
Attainment Summary by Quarter Report.....	7-2
Compensation Summary by Quarter Report.....	7-2

## **8 Scenario Comparison Dashboard**

Scenario Comparison Dashboard Overview.....	8-1
Compensation Cost Summary Report.....	8-1
Attainment versus Quota and Actual Report.....	8-2
Incentive Investment Matrix Report.....	8-2

## **9 Plan Comparison Dashboard**

Plan Comparison Dashboard Overview.....	9-1
Attainment versus Quota by Plan Report.....	9-1
Incentive Investment Matrix Report.....	9-2

## **10 Plan Effectiveness Dashboard**

Overview of Plan Effectiveness Dashboard.....	10-1
Sales Investment Matrix Report.....	10-2
Earnings Distribution by Attainment Report.....	10-2
Attainment versus Quota Report.....	10-3

## **A Setting Up Oracle Incentive Compensation Analytics for ODI**

Prerequisites.....	A-1
Setting Up OIC Metadata Components.....	A-1
Setting Up ODI.....	A-2
Setting Up OBIEE.....	A-4
Setting Up Users and Access.....	A-4

## **Glossary**

## **Index**



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## **Oracle Incentive Compensation Analytics for Oracle Data Integrator User and Implementation Guide, Release 12.1**

**Part No. E16110-02**

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# Preface

## Intended Audience

Welcome to Release 12.1 of the *Oracle Incentive Compensation Analytics for Oracle Data Integrator User and Implementation Guide*.

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 E-Business Suite User's Guide*.

See Related Information Sources on page x for more Oracle E-Business Suite product information.

## Deaf/Hard of Hearing Access to Oracle Support Services

To reach Oracle Support Services, use a telecommunications relay service (TRS) to call Oracle Support at 1.800.223.1711. An Oracle Support Services engineer will handle technical issues and provide customer support according to the Oracle service request process. Information about TRS is available at <http://www.fcc.gov/cgb/consumerfacts/trs.html>, and a list of phone numbers is available at <http://www.fcc.gov/cgb/dro/trsphonebk.html>.

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## Structure

- 1 Introduction to Oracle Incentive Compensation Analytics for Oracle Data Integrator**
- 2 Oracle Incentive Compensation Analytics for ODI Responsibilities**
- 3 Dimensions and Facts**
- 4 Process Flow**
- 5 Compensation Cost Summary Dashboard**
- 6 Plan Performance Summary Dashboard**
- 7 Sales Manager Performance Summary Dashboard**
- 8 Scenario Comparison Dashboard**
- 9 Plan Comparison Dashboard**
- 10 Plan Effectiveness Dashboard**
- A Setting Up Oracle Incentive Compensation Analytics for ODI**
- Glossary**

## Related Information Sources

### Integration Repository

The Oracle Integration Repository is a compilation of information about the service

endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

## Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently
- **Online Help** - Online help patches (HTML) are available on My Oracle Support.
- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.
- **Oracle Electronic Technical Reference Manual** - The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

## Guides Related to All Products

### Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

## **Guides Related to This Product**

### **Oracle Common Application Calendar User Guide**

Oracle Common Application Calendar enables you to manage daily tasks and appointments, create and maintain notes, and schedule resources. It provides a central place to store and view resource schedules, utilization, and availability. It also enables you to synchronize your calendar with external calendars such as Microsoft Outlook or handheld devices.

### **Oracle Daily Business Intelligence Implementation Guide**

This guide enables you to understand the architecture and the reporting dimensions or parameters that define the (hierarchical relationships between data to better implement Oracle Daily Business Intelligence for your business needs. You can learn how to configure and customize dimensions, key performance indicators or measures, reports, and self-service dashboards to better display and manage aggregated data that is relevant, accurate, and timely. Senior managers and executives can use this data to make more informed decisions

### **Oracle Daily Business Intelligence User Guide**

This guide contains information on the various Daily Business Intelligence reports available for each of the E-Business Suite Oracle applications and the regions, graphs, and parameters of these reports. You can learn how to use personalization to change the appearance of regions for your view. This guide also describes how you can email dashboards and reports to named recipients.

### **Oracle Incentive Compensation Implementation Guide**

This guide shows you how to set up and control the way in which your organization compensates its sales force, field sales personnel and partners for selling and retaining customers. You can define rules for collection, calculation, credit allocation, payment, and projected compensation.

### **Oracle Incentive Compensation User Guide**

Oracle Incentive Compensation helps enterprises calculate and pay compensation to their sales forces, vendors, suppliers, and partners. You can also calculate nonmonetary commission, such as points. With Oracle Incentive Compensation, you can create compensation plans that align with your business strategy and assign them. You can also align quota targets with corporate revenue, volume, and profit targets.

### **Oracle Sales Implementation Guide**

This guide enables you to set up users, user groups, and roles, define forecast categories that group products and services to be included in a forecast, set up and enable

currency conversion, and set up the sales dashboard linking the sales funnel to sales stages of a sales methodology. You can also set up Oracle Sales and Oracle Telesales interoperability and set up Oracle Sales for integration with Oracle Territory Manager, Oracle Marketing, Oracle Quoting, Oracle Proposals, Oracle Trade Management, Oracle Partner Management, and Oracle Incentive Compensation.

## **Oracle Sales User Guide**

Oracle Sales enables sales professionals plan and manage the sales process from leads to opportunities to quotes including the tracking of competitors for products within opportunities. It is integrated in the E-Business Suite and optimized for use with wireless. You can use the sales dashboard to view open opportunities, proposals, quotes, top customers, leads by age and by campaign, the latest sales forecast, and your calendar tasks.

## **Installation and System Administration**

### **Maintaining Oracle E-Business Suite Documentation Set**

This documentation set provides maintenance and patching information for the Oracle E-Business Suite DBA. *Oracle E-Business Suite Maintenance Procedures* provides a description of the strategies, related tasks, and troubleshooting activities that will help ensure the continued smooth running of an Oracle E-Business Suite system. *Oracle E-Business Suite Maintenance Utilities* describes the Oracle E-Business Suite utilities that are supplied with Oracle E-Business Suite and used to maintain the application file system and database. It also provides a detailed description of the numerous options available to meet specific operational requirements. *Oracle E-Business Suite Patching Procedures* explains how to patch an Oracle E-Business Suite system, covering the key concepts and strategies. Also included are recommendations for optimizing typical patching operations and reducing downtime.

### **Oracle Alert User's Guide**

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

### **Oracle E-Business Suite Concepts**

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

### **Oracle E-Business Suite CRM System Administrator's Guide**

This manual describes how to implement the CRM Technology Foundation (JTT) and

use its System Administrator Console.

### **Oracle E-Business Suite Developer's Guide**

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

### **Oracle E-Business Suite Installation Guide: Using Rapid Install**

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12, or as part of an upgrade from Release 11*i* to Release 12. The book also describes the steps needed to install the technology stack components only, for the special situations where this is applicable.

### **Oracle E-Business Suite System Administrator's Guide Documentation Set**

This documentation set provides planning and reference information for the Oracle E-Business Suite System Administrator. *Oracle E-Business Suite System Administrator's Guide - Configuration* contains information on system configuration steps, including defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help. *Oracle E-Business Suite System Administrator's Guide - Maintenance* provides information for frequent tasks such as monitoring your system with Oracle Applications Manager, administering Oracle E-Business Suite Secure Enterprise Search, managing concurrent managers and reports, using diagnostic utilities including logging, managing profile options, and using alerts. *Oracle E-Business Suite System Administrator's Guide - Security* describes User Management, data security, function security, auditing, and security configurations.

### **Oracle E-Business Suite User Interface Standards for Forms-Based Products**

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

## **Other Implementation Documentation**

### **Oracle Applications Multiple Organizations Implementation Guide**

This guide describes how to set up multiple organizations and the relationships among

them in a single installation of an Oracle E-Business Suite product such that transactions flow smoothly through and among organizations that can be ledgers, business groups, legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operation units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

### **Oracle Approvals Management Implementation Guide**

This guide describes transaction attributes, conditions, actions, and approver groups that you can use to define approval rules for your business. These rules govern the process for approving transactions in an integrated Oracle application. You can define approvals by job, supervisor hierarchy, positions, or by lists of individuals created either at the time you set up the approval rule or generated dynamically when the rule is invoked. You can learn how to link different approval methods together and how to run approval processes in parallel to shorten transaction approval process time.

### **Oracle Diagnostics Framework User's Guide**

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

### **Oracle E-Business Suite Flexfields Guide**

This guide provides flexfields planning, setup and reference information for the Oracle E-Business Suite implementation team, as well as for users responsible for the ongoing maintenance of Oracle E-Business Suite product data. This guide also provides information on creating custom reports on flexfields data.

### **Oracle E-Business Suite Integrated SOA Gateway Implementation Guide**

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

### **Oracle E-Business Suite Integrated SOA Gateway User's Guide**

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

### **Oracle e-Commerce Gateway Implementation Manual**

This guide describes implementation details, highlighting additional setup steps needed

for trading partners, code conversion, and Oracle E-Business Suite. It also provides architecture guidelines for transaction interface files, troubleshooting information, and a description of how to customize EDI transactions.

### **Oracle e-Commerce Gateway User's Guide**

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle E-Business Suite to conduct business with trading partners through Electronic Data Interchange (EDI). It also describes how to run extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

### **Oracle iSetup User's Guide**

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

### **Oracle Product Lifecycle Management Implementation Guide**

This guide describes how you can define hierarchies of items using structure types, catalogs, and catalog categories, and define change categories and configure them for revised items or request lines. Oracle Product Lifecycle Management provides several predefined catalogs such as the Product Catalog, Asset Catalog, and the Service Catalog and predefined change categories such as change orders and ideas. Use this guide to learn how to define additional catalogs for browsing and reporting purposes and new change categories specific to your business needs. You can then learn how to set up users and responsibilities that provide or restrict access to these catalogs, catalog items, and change management objects.

### **Oracle Product Lifecycle Management User Guide**

This guide describes how to create and manage catalogs, create and maintain product attributes and attribute values, and manage item statuses and lifecycle phases. You can learn how to create change categories, create task templates for change orders, and create change management reports. In addition, you can use this guide to create roles, map roles to privileges, and maintain these roles.

### **Oracle Web Applications Desktop Integrator Implementation and Administration Guide**

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.



## **Oracle Workflow Administrator's Guide**

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

## **Oracle Workflow Developer's Guide**

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

## **Oracle Workflow User's Guide**

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

## **Oracle XML Gateway User's Guide**

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

## **Oracle XML Publisher Administration and Developer's Guide**

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing Oracle E-Business Suite report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions. This guide is available through the Oracle E-Business Suite online help.

## **Oracle XML Publisher Report Designer's Guide**

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety

of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts. This guide is available through the Oracle E-Business Suite online help.

## **Training and Support**

### **Training**

Oracle offers a complete set of training courses to help you master your product 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 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 your product 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.

## **Do Not Use Database Tools to Modify Oracle E-Business Suite Data**

Oracle **STRONGLY RECOMMENDS** that you never use SQL\*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite

automatically checks that your changes are valid. Oracle E-Business Suite 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.



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# Introduction to Oracle Incentive Compensation Analytics for Oracle Data Integrator

This chapter covers the following topics:

- Oracle Incentive Compensation Analytics for Oracle Data Integrator Overview
- Technology Overview
- Architecture Overview
- Datamart Overview
- Plan Modeling Overview
- Dashboards and Reports Overview

## Oracle Incentive Compensation Analytics for Oracle Data Integrator Overview

Oracle Incentive Compensation (OIC) Analytics for Oracle Data Integrator (ODI) is a reporting and analysis framework that enables compensation managers, compensation analysts, plan administrators, and sales managers to access/view relevant and accurate information using dashboards and reports.

OIC Analytics for ODI helps track rewards based on individual and team achievements relative to organization performance and profit targets. OIC Analytics for ODI helps sales executives, finance staff, and compensation analysts and designers gain insight and visibility into designing and optimizing solutions to drive stronger performance, which results in better incentives. OIC Analytics for ODI increases visibility into the following aspects of business:

- Selling behavior relative to quotas
- Compensation plan designs for optimizing sales

- Compensation expenditure management

OIC deals with huge volumes of data about sales, quotas, and payout information. OIC Analytics for ODI presents this data in a meaningful way in a role based method, which helps users make informed decisions and manage compensation plans.

## Technology Overview

OIC Analytics for ODI uses the following technologies:

- Oracle Data Integrator (ODI)
- Oracle Business Intelligence Enterprise Edition (OBIEE)

ODI is a comprehensive data integration platform that covers all data integration requirements from high-volume, high-performance batches, to event-driven, trickle-feed integration processes, to SOA-enabled data services. ODI is the E-Business suite standard for Extract Transform Load (ETL) processing.

For more information on ETL, see *ETL Processing*, page 4-1.

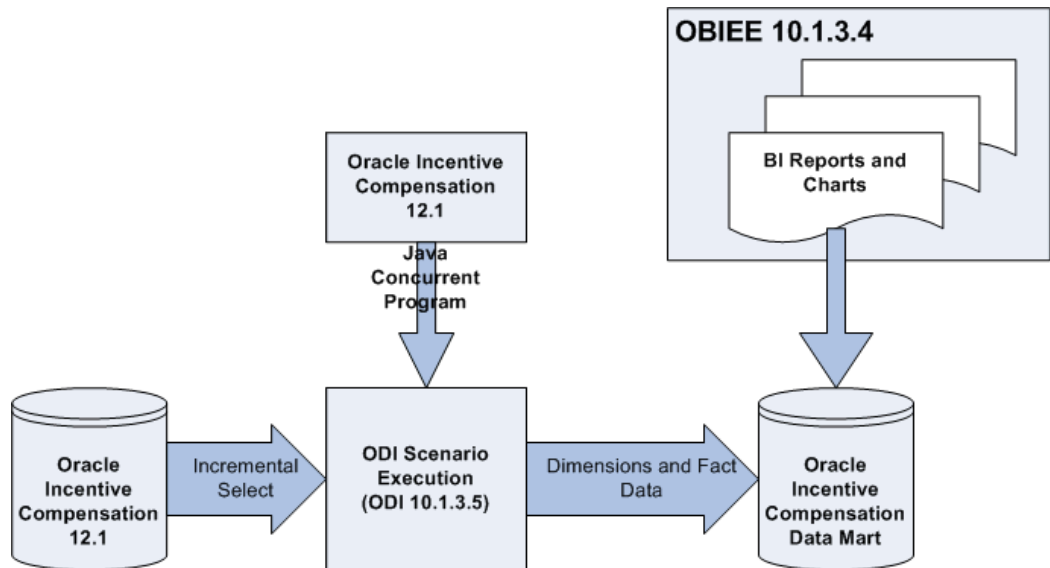
The OBIEE platform is a comprehensive suite of enterprise Business Intelligence (BI) products, delivering interactive dashboards, BI servers, and BI answers.

ODI copies data from the source (OLTP system) to the target datamart tables, using ETL processing technology. OBIEE then renders the dashboard reports to the users based on this data.

## Architecture Overview

The following diagram provides an overview of OIC Analytics:

The OIC source system supplies data to the OIC Analytics system. This data is read by the ODI Scenario Execution system, which moves the data to OIC datamart into different dimensions and facts tables. The OBIEE then generates reports and charts based on data stored in the datamart tables.



## Datamart Overview

OIC datamart tables are structured to meet the needs of compensation analysts, compensation managers, plan administrators, and sales managers. It provides the infrastructure to feed, store, and access the data for reporting purpose.

OIC datamart extracts and stores the relationship data logic, facts, and dimensions that drive the analytics solution for an organization, based on its goals and structure. It is a subset of the master data storage, and data extracted from the OIC application tables is logically distributed here.

Data can originate from multiple heterogeneous sources, including OIC, and be mapped into the datamart to be utilized in OBIEE reporting. ODI artifacts are used to extract data from source to load and transfer them into the OIC datamart tables.

## Plan Modeling Overview

Plan modeling allows users to test assumptions regarding compensation plan elements, and predict outcomes in preparation for introducing new plans or modifying established ones. OIC modeling has the following capabilities:

- **Data access:** OIC presents libraries of datasets extracted from underlying systems to support modeling. Plan administrators can segment or combine data as appropriate to analyze reports.
- **'What if' analysis:** Users can create, compare, and modify different compensation scenarios against actual performance data to analyze income and expense implications.

## Dashboards and Reports Overview

The OBIEE dashboards are tailored for an end users' role in an organization. Users with different OIC responsibilities have access to different dashboards and reports. These dashboards allow users to view various reports and then make analytical decisions based on the data in these reports. For example, the Plan Administrator dashboard is used to model compensation plans.

These are the OBIEE dashboards and reports that are available:

Dashboard Page	Report
Compensation Cost Summary	Compensation Cost by Plan
Compensation Cost Summary	Compensation Cost of Sales by Quarter
Compensation Cost Summary	Compensation Summary by Quarter
Plan Performance Summary	Attainment Summary by Quarter
Plan Performance Summary	Attainment vs. Quota by Plan
Plan Performance Summary	Incentive Investment Matrix
Performance Summary	Salesrep Ranking
Performance Summary	Attainment Summary by Quarter
Performance Summary	Compensation Summary by Quarter
Plan Effectiveness	Attainment versus Quota
Plan Effectiveness	Earnings Distribution by Attainment
Plan Effectiveness	Sales Investment Matrix
Scenario Comparison	Compensation Cost Summary
Scenario Comparison	Attainment vs. Quota and Actual
Scenario Comparison	Incentive Investment Matrix



<b>Dashboard Page</b>	<b>Report</b>
Plan Comparison	Incentive Investment Matrix by Plan
Plan Comparison	Attainment vs. Quota by Plan

For more information on mapping between users and dashboards, see Mapping Between Dashboards and User, page 2-3.



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## Oracle Incentive Compensation Analytics for ODI Responsibilities

This chapter covers the following topics:

- Oracle Incentive Compensation Analytics for ODI Responsibilities
- Sales Manager
- Plan Administrator/Compensation Manager
- Mapping between Dashboard and User
- Security

### Oracle Incentive Compensation Analytics for ODI Responsibilities

OIC Analytics for ODI allows different categories of users to view and analyze reports, based on their responsibilities. Each responsibility is defined based on role and business function, such as a Sales Manager or a Plan Administrator, and provides access to specific dashboard or dashboards. For example, Plan Administrator responsibility enables access to the Scenario Comparison dashboard and Plan Comparison dashboard, which the Sales Manager would not have access to.

**Note:** You cannot modify the responsibilities that are already defined in the application.

Each Oracle Applications user can be assigned one or more responsibilities and several users can share the same responsibility. The System Administrator assigns the appropriate responsibilities to each user.

### Sales Manager

OIC user with the Sales Manager responsibility manages the execution of selling strategy that is set through territory or account management, quota management and

various compensation programs.

Sales managers periodically review sales effectiveness based on performance relative to targets, and addresses positive or negative trends. They measure performance and analyze the OIC Analytics for ODI reports based on the following target criteria:

- Volume production
- Sales effectiveness
- Customer impact

## **Volume Production**

OIC Analytics for ODI measures volume production based on sales volumes, revenues, market share, or profits. Volume production can be measured against currencies or sales units. For example, \$100 million earned in new license revenue per quarter for a particular product.

## **Sales Effectiveness**

OIC Analytics for ODI measures sales effectiveness against products sold, customer retention, customer acquisitions, order volume, or discount rates. For example, a Sales Manager can reduce the average discount rate to 10% and then measure increase or decrease in sales.

## **Customer Impact**

OIC Analytics for ODI measures customer impact against customer satisfaction survey, or loyalty. For example, a Sales Manager can increase the customer satisfaction rate to an average score of eight or higher.

## **Key Monitoring and Analysis Questions**

The infrastructure provided by OIC Analytics for ODI helps sales managers answer the following types of questions:

- What is the performance objective?
- How consistent is performance over time?
- Is the compensation plan motivating and effective?
- Is the revenue per sales person increasing or decreasing?
- Are new or strategic products performing well?

- Does the sales compensation program drive inappropriate behavior?

## Plan Administrator/Compensation Manager

OIC Analytics for ODI users, with Plan Administrator or Compensation Manager role, use the analytics reporting solution to design and maximize effectiveness of compensation plans based on sales strategy, and account for compensation costs. These users track plan costs and communicate with Sales Managers on plan alignment with sales strategy. Plan Administrators and Compensation Managers view reports to:

- Track expectations and perform modeling activities, such as, reviewing cost saving opportunities
- Measure the performance objective based on how consistent performance is over a period of time.

## Key Monitoring and Analysis Questions

The infrastructure provided by OIC Analytics for ODI helps plan administrators and compensation managers answer the following types of questions:

- What is the compensation cost to date?
- What is the ratio of spending to revenue?
- How is the money spent?
- How strong is the correlation between incentive spending and revenue?
- Are quota levels set correctly?
- What is the return on investment of a compensation program?
- Does the sales compensation program drive inappropriate behavior?

## Mapping between Dashboard and User

Users with different OIC responsibilities have access to different dashboards and reports. The following table lists the users, and the respective dashboards and reports they have access to:

<b>Responsibility</b>	<b>Dashboard Page</b>	<b>Report</b>
Sales Manager	Performance Summary (Sales Manager)	Salesrep Ranking
Sales Manager	Performance Summary (Sales Manager)	Attainment Summary by Quarter
Sales Manager	Performance Summary (Sales Manager)	Compensation Summary by Quarter
Plan Administrator	Scenario Comparison	Compensation Cost Summary
Plan Administrator	Scenario Comparison	Attainment vs. Quota and Actual
Plan Administrator	Scenario Comparison	Incentive Investment Matrix
Plan Administrator	Plan Effectiveness	Attainment versus Quota
Plan Administrator	Plan Comparison	Incentive Investment Matrix by Plan
Plan Administrator	Plan Comparison	Attainment vs. Quota by Plan
Compensation Manager	Compensation Cost Summary	Compensation Cost by Plan
Compensation Manager	Compensation Cost Summary	Compensation Cost of Sales by Quarter
Compensation Manager	Compensation Cost Summary	Compensation Summary by Quarter
Compensation Manager	Plan Effectiveness	Attainment versus Quota
Compensation Manager	Plan Effectiveness	Earnings Distribution by Attainment
Compensation Manager	Plan Effectiveness	Sales Investment Report
Compensation Manager	Plan Performance Summary	Attainment Summary by Quarter

Responsibility	Dashboard Page	Report
Compensation Manager	Plan Performance Summary	Attainment vs. Quota by Plan
Compensation Manager	Plan Performance Summary	Incentive Investment Matrix

## Security

OIC Analytics for ODI security restricts user access to dashboards and reports. Users have access to only the dashboards and reports that are mapped to their role and responsibility.

OIC Analytics for ODI is integrated with the security model of the operational OIC system to allow the right content to be shown to the right user. Security can be broadly classified into three categories:

- **Data Security:** This controls the visibility of data that the application renders in the dashboards. The same report, when run by two different users, can show different data. For example, reports can be filtered by Operating Unit.
- **Object Security:** This controls the visibility of dashboards and reports based on a user's role.
- **User Security:** This refers to authentication and confirmation of the user's identity based on the credentials provided.

The system maintains the data security that is defined in the E-Business Suite when users access the same data in OBIEE. To maintain object security, when a user logs into the system, and the user's E-Business Suite responsibility matches an Oracle BI Server group, the system automatically assigns the appropriate permissions to the user.

**Note:** Users accessing the Sales Manager reports are synchronized with Resource Manager Compensation group hierarchy. Users accessing the Plan Administrator reports are synchronized with OIC Plan Access for the Operating Unit. To secure data using operating units, the administrator can add filters in the dashboards and reports.





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## Dimensions and Facts

This chapter covers the following topics:

- OIC Analytics for ODI Dimensions
- OIC Analytics for ODI Facts
- Currency

### OIC Analytics for ODI Dimensions

A dimension is a structure that categorizes data in order to enable users to answer business questions. Dimensions represent the organization of logical attributes that belong to a single logical dimension table.

OIC Analytics for ODI uses the following dimensions in reports:

- Organization
- Product and Product Hierarchy
- Resource and Resource Hierarchy
- Group and Group Hierarchy
- Time (OIC Period and Interval)
- Compensation Plan
- Scenario

Dimensions can be either single-level or multi-level. Single-level dimensions store flat data, whereas multi-level dimensions store hierarchical data that represents business reporting requirement.

## Organization Dimension

OIC Analytics for ODI uses the Organization dimension when you select organization related details in the various OIC Analytics for ODI reports. If an application environment supports multiple organizations then users can view details specific to their assigned organization only.

## Product Hierarchy Dimension

OIC Analytics for ODI uses the Product Hierarchy dimension along with the Product dimension when you drill down a product hierarchy in a report. Plan administrators define this hierarchy at the OIC module level.

- **Product Dimension:** This is a single-level dimension with corresponding OIC revenue data.

For example, you can view performance of a single product, without any drill down features.

- **Product Hierarchy Dimension:** This is a multi-level hierarchical dimension for product hierarchies.

For example, you can view performance of all sub-products that fall under a higher-level product or category and then drill down to individual products.

**Note:** Datamart and BI metadata layer supports only up to 15 levels of information. If you have more levels defined in the OIC system, datamart and BI layer will not support these.

## Resource Hierarchy Dimension

OIC Analytics for ODI uses the Group Hierarchy dimension along with the Group dimension to determine the rollup structure and drives managers' view of their subordinates. This dimension is based on data in the Resource Manager, Compensation group hierarchy.

**Note:** Datamart and BI metadata layer supports only up to 15 levels of information. If you have more levels defined in the OIC system, datamart and BI layer will not support these.

## Group and Group Hierarchy

OIC Analytics for ODI uses the Group Hierarchy dimension along with the Group dimension to determine the rollup structure and drives managers' view of their subordinates. This dimension is based on data in the Resource Manager, Compensation

group hierarchy.

**Note:** Note: Datamart and BI metadata layer supports only up to 15 levels of information. If you have more levels defined in the OIC system, datamart and BI layer will not support these.

## Time (Period Interval) Dimension

OIC Analytics for ODI uses the Time dimension when you view reports driven by periods or intervals. All facts use the Time dimension to facilitate time-related reporting and roll up data to different time periods. This dimension is also hierarchical with three levels – period, quarter and year.

## OIC Analytics for ODI Facts

Facts are logical collection of measures or calculated data that can be specified in terms of dimensions, such as sum of commissions related to compensation, or commissions earned by a specific resource over a period of time.

**Note:** Note: Dimensions are attributes that qualify facts and give structure to facts.

OIC Analytics for ODI uses the following facts in the various reports:

- Earnings
- Quota

## Earning Fact

The Earning fact stores sales credits and commissions earned by resource OIC. All the OIC transactions that are calculated are stored in this fact table.

For more information about the loading process, see *Oracle Incentive Compensation User Guide*.

The Earnings fact is based on the following dimensions:

- Compensation Plan
- Product
- Resource
- Transaction Type

- Time
- Organization
- Scenario

## Quota Fact

The Quota fact contains the quotas and attainment for a plan element in a period for each salesperson. This fact is based on the following dimensions:

- Compensation Plan
- Organization
- Time
- Resource

## Currency

OIC Analytics for ODI uses the currency parameter to store data in the facts. Whenever, you run the ODI data load process, the application checks for the global currency and exchange rate defined in the system profile and then performs currency conversion accordingly.

For example, the original transaction amount is 500 CAD, the global currency is set to USD, and the monthly conversion rate is 2. Then the application will store 1,000 USD (500 CAD \* 2) as the amount in global currency fields.

**Note:** You can use different currency fields in a report to view multiple currencies.

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## Process Flow

This chapter covers the following topics:

- Handling Time Periods
- ETL Processing
- Incremental Copy
- Flattened Hierarchy Data Structure
- Product Hierarchy Versioning
- Salesperson Quota Distribution

### Handling Time Periods

The Period parameter is the time period for which data is aggregated in the reports. The plan period is the smallest period within the plan duration for which the goals are set and attainment is measured. Period can be month, quarter or full year.

Periods play an important role when you measure commission of salespersons. Commissions can be calculated against transactions individually at different rates or they can be cumulated for a period and calculated together at a single rate. While calculating commissions for a period, the application ensures that the periods do not overlap.

**Note:** For more information about periods, see the *Oracle Incentive Compensation User Guide*.

### ETL Processing

OIC Analytics for ODI uses ODI to load data into the datamart tables, using ETL processing.

The ETL process automatically runs in either of two modes determined at runtime:

- **Full:** This mode is invoked the first time the process is run and there is no prior data in the datamart tables. Entire data from the transaction system is copied to the datamart tables, which is then synchronized with the source.
- **Incremental:** Data that has changed since the last ETL run, or data that has been added after the last ETL run is copied to the datamart tables.

**Note:** The ETL process should be run after all changes are completed and the calculation engine has finished processing so that the datamart tables are in sync with the OIC system.

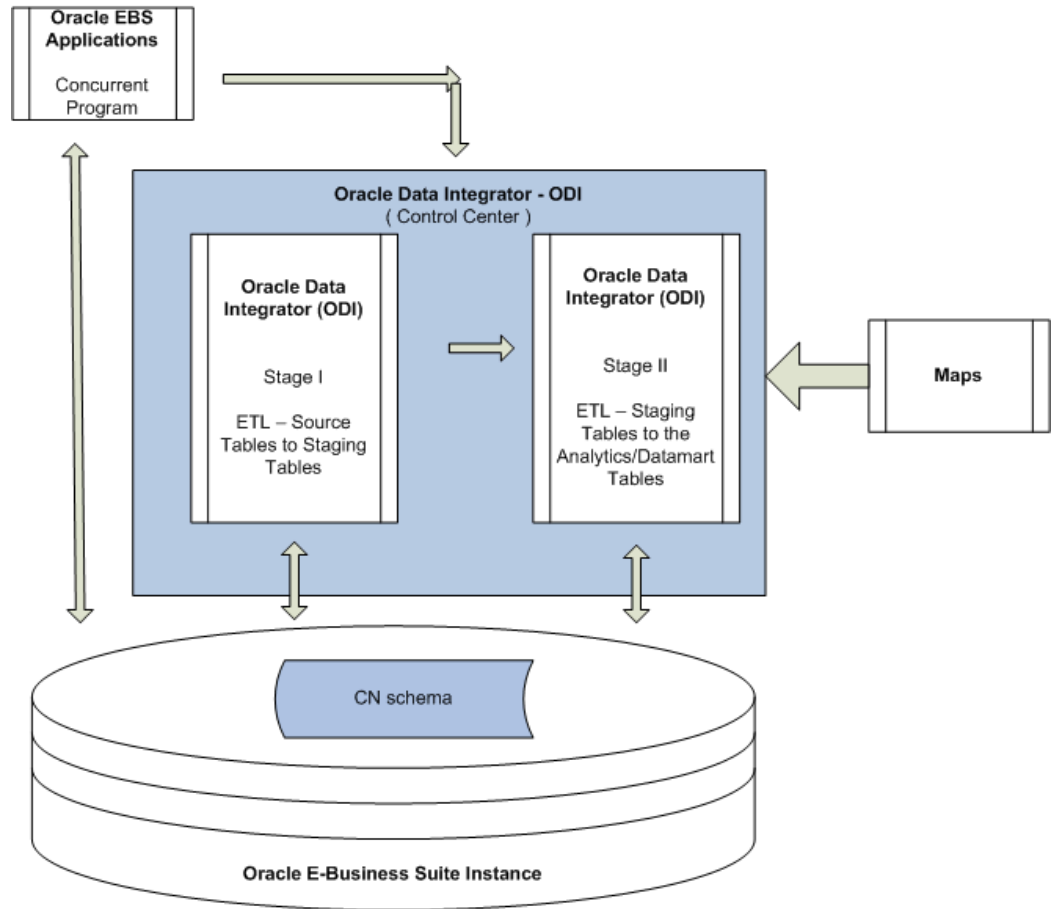
During the ODI process, data is copied from source system to the datamart tables. In some cases data is staged in intermediate tables prior to insertion into the datamart tables.

The following objects are staged to the intermediate tables:

- Product Hierarchy
- Resource Hierarchy
- Group Hierarchy
- Transaction Type
- Earnings
- Quota

The following objects are not staged to the intermediate tables:

- Organization
- Product
- Resource
- Compensation Plan
- Group
- Time
- Scenario
- Earnings Attribute



The ETL process performs the following functions:

- Copy data from source to target datamart tables.
- De-normalize data for efficient reporting.
- Maintain integrity of dimensions and facts.
- Perform error handling and management.
- Incremental data move.

## Maps

The application uses maps to load data from the OIC source tables to the datamart tables.

For dimensions and facts that are staged, the application uses maps to load data from source tables to staging tables and subsequently from staging tables to datamart tables. Maps commonly use BATCH\_ID, ORGANIZATION\_ID and LAST\_RUN\_DATE as the input parameters for every phase of processing.

**Note:** Dimension data is always moved before fact data.

## Incentive Compensation Analytics – ODI Concurrent Program

Users run the Incentive Compensation Analytics – ODI concurrent program to copy operational data from the OIC system to the datamart tables. This concurrent program initiates an ELT process by invoking the CN\_ANALYTICS\_PKG ODI scenario.

**Note:** The concurrent program runs in a mutually exclusive mode with other OIC calculation processes.

Enter the following parameters to run the concurrent program:

- Organization ID: Identifies the Business Unit where the data will be copied to, in the datamart.
- User ID: Identifies the user who has requested to run the ELT process.
- Source System ID: Identifies the source system where data is stored. This parameter is used if you move data to a different instance.
- ELT Load Type: Identifies if the ELT process is run in Full mode or Incremental mode.
- Model Flag: Identifies if the data will be used for modeling purpose.

**Important:** To run this concurrent program you must host the ODI invocation libraries on the EBS Application Server. For information on setup and deployment of these libraries refer the 7631642:R12.CN.B OIC Analytics Patch readme.

## Incremental Copy

With the incremental copy feature, OIC Analytics for ODI identifies any data that has changed since the last ETL run and copies only those rows to the datamart tables. The incremental copy process improves the efficiency of the system, by reducing the load on the system.

At the end of the process, the ODI scenario updates the status in its audit tables. This is used to track the incremental process execution.

To ensure that your data is up-to-date, it is recommended that you run the incremental process to optimize the data load performance. Your BI administrator schedules the incremental request sets daily or at regular intervals.



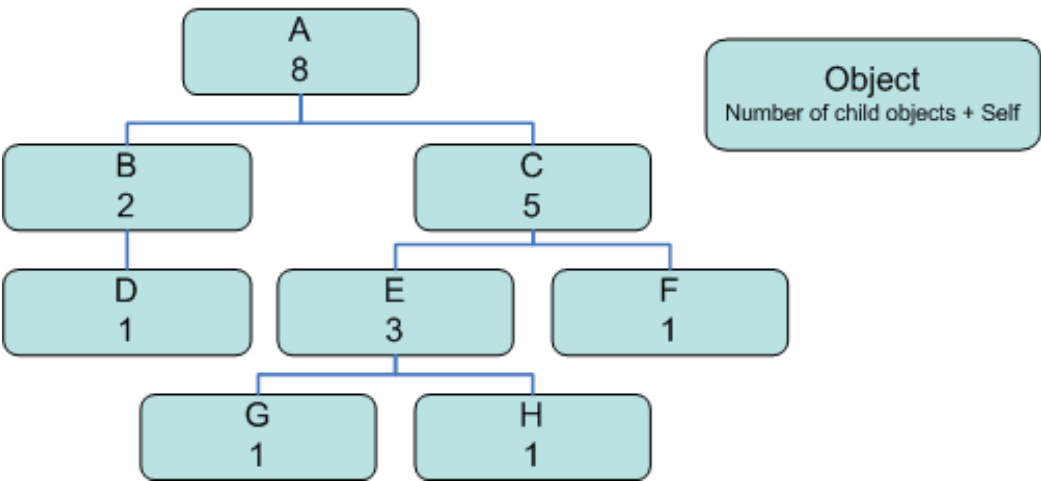
**Note:** The first data load run will be Full data load. Any subsequent loads will use the Incremental Copy feature.

## Flattened Hierarchy Data Structure

When the application copies data from the OIC source tables to the datamart tables, the data is flattened into a structure that can be used by BI. Flattening data optimizes the performance of queries executed by the dashboards and reports.

OIC Analytics for ODI uses column flattening to flatten out data copied from OIC source tables into the target hierarchical datamart tables. The resource and product entities in the datamart tables are column flattened. In this technique, one record exists per chain of hierarchy.

The following is an example of source hierarchical relationship.



The hierarchical structure represented above depicts the entities in the source.

The following table lists the data structured in a manner that reflects datamart, in a column flattened hierarchy:

**Column Flattened Hierarchy**

Level 1	Level 2	Level 3	Level 4	Leaf
A				A
A	B			B

Level 1	Level 2	Level 3	Level 4	Leaf
A	B	D		D
A	C			C
A	C	E		E
A	A	F		F
A	C	E	G	G
A	C	E	H	H

## Product Hierarchy Versioning

Products are versioned in the datamart, so that the application can keep an account of changes to the product hierarchy.

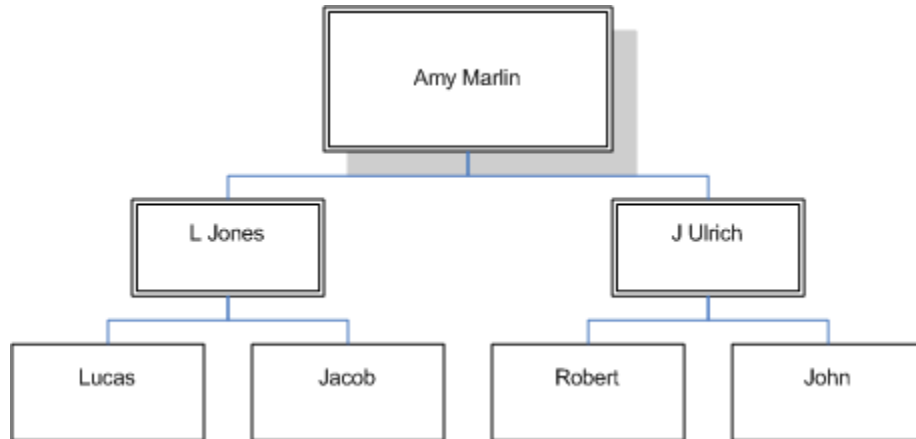
The application reloads a product hierarchy when any hierarchy member's last update date and time is later than the previous ODI ETL processing date. The application will set an end date for the existing hierarchy in the datamart, and the newly loaded hierarchy will be created with a new effective start date.

If the entire product hierarchy is deleted in OIC, then the application will set an end date for the corresponding product hierarchy within the target datamart.

**Note:** If the products are used in either classification rules or a product hierarchy, you cannot delete the product from OIC system

## Salesperson Quota Distribution

In the following organizational structure, Lucas & Jacob have period-based quotas while Robert and John have quarterly quotas.



The following table depicts the period-wise and quarterly quota distributions for the resources within the organization.

Name	Period	Quota (USD)
Lucas	Mar-08	4000
Jacob	Mar-08	5000
Robert	Qtr1-2008	12000
John	Qtr1-2008	15000

If the organization distributes the quotas, then the period-wise allocation would be:

Name	Period	Quota (USD)
Lucas	Mar-08	4000
Jacob	Mar-08	5000
Robert	Jan-08	4000
Robert	Feb-08	4000
Robert	Mar-08	4000
John	Jan-08	5000

Name	Period	Quota (USD)
John	Feb-08	5000
John	Mar-08	5000

Since Robert is set up for the first quarter, the application distributes the total quota equally among the three months of the quarter. Similarly, for John, the application distributes the quota equally among the months in the quarter.

If Robert has achieved a USD 1000 target for Jan-2008, then the attainment for the quarter would be 11.11%. If measured for the month, the attainment will be 33.33%. The following table shows the quota distribution and attainment, as stored in the OIC datamart:

Name	Interval Type	Period	Period-to-Date Quota	Interval-to-Date Quota	Period-to-Date Attainment	Interval-to-Date Attainment	Attainment %
Robert	Quarter	Jan	0	12000	3000	3000	25
		Feb	0	12000	3000	6000	50
		Mar	12000	12000	3000	9000	75
John	Quarter	Jan	0	15000	5000	5000	33
		Feb	0	15000	5000	10000	66
		Mar	15000	15000	5000	15000	100
Lucas	Month	Jan	4000	4000	4000	4000	100
		Feb	4000	4000	3000	3000	75
		Mar	4000	4000	3500	3500	90

If you change any quota, then the application sets an end date for existing quota in the

datamart and stores the latest quota with a new effective date.

For example, assume that you have set monthly quotas for Lucas and Jacob, as follows:

Name	Period	Quota	Creation Date
Lucas	Mar-09	5000	15-Dec-08
Jacob	Mar-09	5000	15-Dec-08

Data loaded on Dec 15, 2008 into OIC Analytics will be stored as:

Name	Period	Quota	Effective From Date	Effective to Date	Last Record
Lucas	Mar-09	5000	15-Dec-08		Yes
Jacob	Mar-09	5000	15-Dec-08		Yes

If you change Lucas' quota on Feb 10, 2009, for the period Mar 2009, from 5000 to 6000, then subsequent propagation of this changed data after Feb 10, 2009 will result in the following data storage within the datamart:

Name	Period	Quota	Effective From Date	Effective to Date	Last Record
Lucas	Mar-09	6000	10-Feb-09		Yes
Jacob	Mar-09	5000	15-Dec-08		Yes

Assume, a change on Mar 10, 2009 to Lucas' quota for the period Mar 2009 from 6000 to 5500. Data loaded after Mar 10, 2009, will result in the following data storage within the datamart:

Name	Period	Quota	Effective From Date	Effective to Date	Last Record
Lucas	Mar-09	6000	10-Feb-09	1-Mar-09	No
Jacob	Mar-09	5000	15-Dec-08		Yes

<b>Name</b>	<b>Period</b>	<b>Quota</b>	<b>Effective From Date</b>	<b>Effective to Date</b>	<b>Last Record</b>
Lucas	Mar-09	5500	10-Mar-09		Yes

If you run an analytics report run on Mar 01, 2009, it will show USD 6000.00 quota for Lucas. A subsequent report run on Mar 10, 2009 will show Lucas having a quota of USD 5500.00.

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## Compensation Cost Summary Dashboard

This chapter covers the following topics:

- Overview of Compensation Cost Summary Dashboard
- Compensation Cost
- Compensation Summary by Quarter Report

### Overview of Compensation Cost Summary Dashboard

The Compensation Cost Summary dashboard and integrated reports provide the compensation managers with views of data that display the cost effectiveness of compensation plans.

The reports are displayed based on the scenario prompt value that has been selected by the user.

### Compensation Cost

The Compensation Cost of Sales by Quarter and Compensation Cost by Plan reports are grouped under the parent report called Compensation Cost.

Compensation managers and plan administrators access these reports to analyze the ratio of commission costs to a transaction value. These reports also show the percentage of sales as compensation costs and the compensation elements that have the most revenue impact and the least revenue impact.

The Compensation Cost of Sales report measures the return relevant to the compensation investment. This report also enables a compensation designer to analyze whether compensation costs are on track with variable budget estimates over time, based on expectations.

The Compensation Cost of Sales by Quarter report shows quarterly distribution of earned commission.

## Dimensions

The Compensation Cost report uses the following dimensions:

- Time
- Scenario

## Measures

The Compensation Cost report uses the following measures:

- Quota
- Attainment
- Earned Commission
- Bonus
- Sales Credits

## Compensation Summary by Quarter Report

The Compensation Summary by Quarter report shows different components of compensation, which includes bonus and commissions. This report also shows the earnings-to-date by compensation scenario distributed over the quarters.

## Dimensions

The Compensation Summary by Quarter report uses the following dimensions:

- Time
- Scenario

## Measures

The Compensation Summary by Quarter uses the following measures:

- Earned Commission
- Bonus
- Total Earnings



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## Plan Performance Summary Dashboard

This chapter covers the following topics:

- Overview of Plan Performance Summary Dashboard
- Attainment Summary by Quarter Report
- Incentive Investment Matrix Report
- Attainment versus Quota by Plan Report

### Overview of Plan Performance Summary Dashboard

The Performance Summary dashboard provides compensation managers and compensation analysts, reports to track performance of plan and quota.

### Attainment Summary by Quarter Report

The Attainment Summary report shows a quarterly summarized view of commission versus transaction for each selected compensation plans. Comparative analysis of different periods helps monitor target attainments.

On analysis of this report, compensation managers and analysts would be able to measure:

- Performance to date
- Increase or decrease in revenue over quarters

### Dimensions

The Attainment Summary by Quarter report uses the following dimensions:

- Time
- Compensation Plan

## Measures

The Attainment Summary by Quarter uses the following measures:

- Total Transactions (Sales Credits)
- Total Commissions
- Commission as a percent of transactions (this is a calculated measure)

## Incentive Investment Matrix Report

The Incentive Investment Matrix report enables a compensation manager to view the distribution of commissions relative to transactions that are grouped by plans.

Compensation managers and plan administrators analyze the report to check the ratio of commission expense paid to the transactions being attained. For example, for every new product that is introduced by a company, a customer might pay higher commission expense than for an existing product.

## Dimensions

The Incentive Investment Matrix report uses the following dimensions:

- Time
- Compensation Plan

## Measures

The Incentive Investment Matrix report uses the following measures:

- Total Transactions (Sales Credits)
- Total Commissions
- Commission as a percent of transactions (this is a calculated measure)

## Attainment versus Quota by Plan Report

The Attainment versus Quota by Plan report enables a compensation manager to view the total attainment versus total quota, and the corresponding attainment percentages by plan element.

Compensation managers and plan administrators analyze the report to check whether sales or partner channels are under achieving or over achieving on the elements of a plan. When severe under or over achievement is discovered, this can be used to identify the root cause within a compensation plan.

## **Dimensions**

The Attainment versus Quota by Plan report uses the following dimensions:

- Time
- Compensation Plan

## **Facts**

The Attainment versus Quota by Plan report uses the following measures:

- Total Transactions (Sales Credits)
- Total Quota
- Attainment Percent as a percent of transactions (this is a calculated measure)



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# Sales Manager Performance Summary Dashboard

This chapter covers the following topics:

- Sales Manager Performance Summary Dashboard Overview
- Sales Person Ranking Report
- Attainment Summary by Quarter Report
- Compensation Summary by Quarter Report

## Sales Manager Performance Summary Dashboard Overview

The Sales Manager Performance Summary dashboard and its integrated reports provide sales managers with data that shows the performance in their organizational hierarchy.

## Sales Person Ranking Report

This report shows the performance of a sales organization and is ranked by attainment percentage. Sales managers can use plan and plan elements to filter data in the report.

### Dimensions

The Sales Person Ranking report uses the following dimensions:

- Time
- Compensation Plan
- Sales Representative
- Organization

## Measures

The Sales Person Ranking report uses the following measures:

- Quota
- Attainment

## Attainment Summary by Quarter Report

This report shows total attainment by quarter for the sales organization of a manager. Sales managers can use plan and plan elements to filter data in the report.

## Dimensions

The Attainment Summary by Quarter report uses the following dimensions:

- Time
- Compensation Plan
- Sales Representative
- Organization

## Facts

The Attainment Summary by Quarter report uses the following measures:

- Quota
- Attainment

## Compensation Summary by Quarter Report

This report shows total commissions by quarter for the sales organization of a manager. Sales managers can use plan and plan elements to filter data in the report.

## Dimensions

The Compensation Summary by Quarter report uses the following dimensions:

- Time
- Compensation Plan
- Sales Representative

- Organization

## **Facts**

The Compensation Summary by Quarter report uses the Commission Amount measure.





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## Scenario Comparison Dashboard

This chapter covers the following topics:

- Scenario Comparison Dashboard Overview
- Compensation Cost Summary Report
- Attainment versus Quota and Actual Report
- Incentive Investment Matrix Report

### Scenario Comparison Dashboard Overview

The Scenario Comparison dashboard and its integrated reports provide plan administrators with views of data that help in analysis of the performance, cost, and attainments by scenario. It also provides a comparative view of multiple scenarios that are displayed based on the scenarios that are selected.

### Compensation Cost Summary Report

The Compensation Cost Summary report displays the total cost (commission paid) of an entire scenario. Plan administrators access this report to analyze the total commissions earned by resources assigned to plans that belong to the selected scenarios.

#### Dimensions

The Compensation Cost Summary report uses the following dimensions:

- Time
- Scenario
- Organization

## Facts

The Compensation Cost Summary report uses the Earned Commissions measure.

## Attainment versus Quota and Actual Report

The Attainment versus Quota and Actual report shows the total quota and total sales credits for each scenario and for the selected scenarios.

## Dimensions

The Attainment versus Quota and Actual report uses the following dimensions:

- Time
- Scenario
- Organization

## Facts

The Attainment versus Quota and Actual report uses the following measures:

- Quota
- Attainment

## Incentive Investment Matrix Report

The Incentive Investment Matrix reports shows the commissions earned against sales credits for all the selected scenarios. It displays the cost of each scenario as compared to the total sales achieved.

## Dimensions

The Incentive Investment Matrix report uses the following dimensions:

- Time
- Scenario
- Organization

## Facts

The Incentive Investment Matrix report uses the following measures:

- Commission Amount
- Transaction Amount



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## Plan Comparison Dashboard

This chapter covers the following topics:

- Plan Comparison Dashboard Overview
- Attainment versus Quota by Plan Report
- Incentive Investment Matrix Report

### Plan Comparison Dashboard Overview

The Plan Comparison dashboard and its integrated reports provide plan administrators with views of data that help in analysis of the performance, cost, and attainments by plan. It also provides a comparative view of multiple plans that are displayed based on user's selection.

### Attainment versus Quota by Plan Report

The Attainment versus Quota by Plan report shows the total quota and sales credits for each plan for the selected plans.

#### Dimensions

The Attainment versus Quota by Plan report uses the following dimensions:

- Time
- Compensation Plan
- Organization

#### Facts

The Attainment versus Quota by Plan report uses the following measures:

- Quota
- Attainment

## Incentive Investment Matrix Report

The Incentive Investment Matrix report shows the commissions earned against sales credits for the selected plans. It displays the cost of each scenario as compared to the total sales achieved.

### Dimensions

The Incentive Investment Matrix report uses the following dimensions:

- Time
- Compensation Plan
- Organization

### Facts

The Incentive Investment Matrix report uses the following measures:

- Commission Amount
- Transaction Amount

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## Plan Effectiveness Dashboard

This chapter covers the following topics:

- Overview of Plan Effectiveness Dashboard
- Sales Investment Matrix Report
- Earnings Distribution by Attainment Report
- Attainment versus Quota Report

### Overview of Plan Effectiveness Dashboard

The Plan Comparison dashboard and integrated reports allows the incentive compensation managers to analyze how effective a plan is by viewing the rate of attainment and the sales credit and the returns generated from the plans. The reports also allow sales executives to view how their earnings are distributed.

The application displays data in these reports based on these conditions:

- As Of Date: Data is displayed as of the date specified.
- Interval: User can select from the following intervals:
  - Period: Data is displayed as per the defined period.
  - Quarter: Data is displayed quarter-to-quarter.
  - Year: Data is displayed year-to-year
- Manager: Data is displayed for the selected manager.
- Currency: This is used in a multi-currency scenario. If transactions are in different currencies, then selecting this option will render the data in a uniform currency, after conversion.

## Sales Investment Matrix Report

Incentive Compensation managers use the Sales Investment Matrix report to analyze the performance of compensation against sales. They view this report to see performance of products that they are linked to.

The Sales Investment Matrix report is designed to show sales executives the revenue to compensation ratio for different products and services. For manager, this report determines the returns on different products and services.

You can select the following in the report:

- Plan Element
- Transaction Amount
- Commissions

### Dimensions

The Sales Investment Matrix report uses these dimensions:

- Compensation Plan (Plan Name, Plan Element Name)
- Product (Product Name, Level)
- SalesRep (SalesRep Name and Parent Resource Level)

### Measures

The Sales Investment Matrix report measures the following:

- Total Sales Transactions
- Total Earned Commissions, Total Earned Commissions Rate (percentage of Sales Credit)

## Earnings Distribution by Attainment Report

Incentive Compensation managers use this report to view the earnings.

Compensation managers use this report to:

- View the payout and the behavior of the plan.
- View the ratio of spending to revenue.



- Analyze if the compensation is in alignment with the company's policy.
- Analyze the return of investment of the compensation plan.

By default, the report displays performance in ranges of 10%, but you can choose to show this range in any level of granularity. The data is rolled up to the top most level in hierarchy, and you can traverse the hierarchy to subsequent lower levels.

**Note:** It is assumed that quotas are defined in the source Oracle Incentive Compensation system and that the plans are measured cumulatively for all data related to quotas.

You can select the following in the report:

- SalesRep Name
- Attainment Percentage
- Commissions

## Dimensions

The Earnings Distribution by Attainments report uses the following dimensions:

- Time (Period, Quarter, and Year)
- Compensation Plan (Plan Name, Plan Element Name)
- SalesRep (SalesRep Name and Parent Resource Level)

## Measures

The Earnings Distribution by Attainment report measures the following:

- Number of Participants
- Total Sales Transactions
- Attainment Percentage

## Attainment versus Quota Report

This report shows sales executives, plan administrators, and compensation managers the relative distribution of targets for key dimensions that they are responsible for. Sales executives use this report to analyze the degree to which quotas are set against a strategy. This would in turn help them plan for quota for next year.

You can select the following in the report:

- SalesRep Name
- Total Quota
- Transactions Amount
- Percentage Quota

## Dimensions

This report uses the following dimensions:

- Product (Product Name, Level)
- Compensation Plan (Plan Name, Plan Element Name)
- SalesRep (SalesRep Name and Parent Resource Level)

## Measures

The Attainment versus Quota report measures the following:

- Total Quota
- Total Sales Credits
- Total Attainment

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# Setting Up Oracle Incentive Compensation Analytics for ODI

This appendix covers the following topics:

- Prerequisites
- Setting Up OIC Metadata Components
- Setting Up ODI
- Setting Up OBIEE
- Setting Up Users and Access

## Prerequisites

The following applications must be installed in the system, before you work with Oracle Incentive Compensation Analytics:

- E-Business Suite Application Release R12.1 or later releases
- Oracle Data Integrator (ODI) version 10.1.3.5
- Oracle Business Intelligence Enterprise Edition (OBIEE) version 10.1.3.4.

## Setting Up OIC Metadata Components

The ODI artifacts and OBIEE metadata repository are bundled with the 7631642:R12.CN.B patch. These components are installed and deployed in E-Business Top, in the \$CN\_TOP/patch/115/odi and \$CN\_TOP/patch/115/obiee directories respectively.

### Creating DBLINK

On the target instance/schema, create a database link ORACLE\_APPS with the

connection details of the source instance/schema.

```
CREATE DATABASE LINK ORACLE_APPS
CONNECT TO APPS
IDENTIFIED BY &AppsPassword
USING '(DESCRIPTION = (ADDRESS = (PROTOCOL = tcp) (HOST = &HostName)
(PORT = &PortNo)) (CONNECT_DATA = (SID = &DBName)))';
```

## Setting Up ODI

Setting up ODI consists of:

- ODI Topology
- ODI Designer
- Re-Host ODI Invocation in E-Business Suite

## ODI Topology

### Logical Schema Tab

1. Create the logical schema "ORACLE\_APPS" for source schema
2. Create the logical schema "ORACLE\_CN" for target schema

### Context Tab

Create the context "CN\_CONTEXT"

### Physical Schema

Define the Source Schema and Target Schema data servers.

1. Create the Data Server "ORACLE\_CN\_OLTP" for source schema.  
  
If the source and target schemas are defined in the same instance then enter "ORACLE\_APPS" in Instance/dblink (Data Server).  
  
If the source and target schemas are defined on separate instances, then name Instance/dblink (Data Server) as db/SID/TWO\_TASK.
2. Associate CN\_CONTEXT with ORACLE\_APPS, under the Context tab.
3. Create the data server "ORACLE\_CN\_OLAP" for target schema. Name the Instance/dblink as TWO\_TASK name.
4. Associate CN\_CONTEXT with ORACLE\_CN, under the context tab.

## ODI Designer

Bundle and copy all the ODI artifacts files to a location accessible by ODI. To import Oracle Incentive Compensation ODI artifacts:

1. Locate the Import Util file, `cnodi_import_util.zip`, in the `$CN_TOP/odi/US/util/` folder; copy it to the ODI installation/staging area and unzip into a temporary folder.
2. Locate the ODI installation folder bin folder.
3. Modify `odiparams.sh` on Linux) or `odiparams.bat` on Windows) according to the ODI setup, including jdbc connections and repository info.

For example,

```
set ODI_SECU_DRIVER=oracle.jdbc.driver.OracleDriver
set ODI_SECU_URL=jdbc:oracle:thin:@localhost:1521:XE
set ODI_SECU_USER=snpml set
ODI_SECU_ENCODED_PASS=ccfHMPvDjDxVJ.ODIXD2kUkRte
set ODI_SECU_WORK_REP=WORKREP1 set ODI_USER=SUPERVISOR
set ODI_ENCODED_PASS=LELKIELGLJMDLKMGEHJDBGBGFDDGGH
```

4. Modify properties in `odi_import.properties` under the util folder.
5. Run the following command in ODI installation bin folder, specifying the Buildfile location and the name of the output log file:

On Windows:

```
D:\Oracle_ODI\oracledi\bin>startcmd OdiAnt "-
BUILDFILE=D:\OIC\ODI\packaging\UTIL\build.xml" "-
LOGFILE=D:\OIC\ODI\packaging\UTIL\output.log"
```

On Linux:

```
sh startcmd.sh OdiAnt "-
BUILDFILE=/slot/ems3512/oracle/OICANA/util/build.xml" "-
LOGFILE=/slot/ems3512/oracle/OICANA/util/output.log"
```

## Re-Host ODI Invocation in E-Business Suite

1. Deploy `odi-sdk-invocation.jar` on EBS Apache installation Ensure that the CLASSPATH has reference to `jdk/bin` and `jdbc/lib/ojdbc14.jar`.
2. Include `odi-sdk-invocation.jar` into the environment variable `$AF_CLASSPATH`

**Re-host the ODI Scenario parameter file.**

For E-Business Suite Application concurrent manager to initiate the ELT process:

1. Unzip the `cnodiparams.zip` file located in the `$CN_TOP/patch/115/odi/US/util/` folder into the APPLCSF area. Update the `cn_odiparams.properties` file with the

ODI connection parameters.

2. Start the ODI agent.

## Setting Up OBIEE

1. Re-Host the Oracle Incentive Compensation Analytics metadata files.
  1. Unzip the \$CN\_TOP/patch/115/obiee/cnrpd.zip file under the <Oracle BI Home>/server/Repository directory.
  2. Unzip the \$CN\_TOP/patch/115/obiee/cnwebcat.zip file under the <Oracle BI Data Home>/web/catalog directory.
2. Shutdown the OBIEE services
3. Modify the OBIEE Repository server configuration file.
4. For single-sign on from EBS Application to the BI Reports, modify the OBIEE Web Catalog configuration file for external authentication.

**Note:** Refer My Oracle Support note 552735.1.

5. Set up the connection pool.
6. Start the OBIEE service.

## Setting Up Users and Access

Add users to the EBS application and assign responsibilities to these users.

The Compensation Manager should have access to the following dashboard pages and reports:

- Compensation Cost dashboard
  - Compensation Cost by Plan Elements report
  - Compensation Cost of Sales by Quarter report
  - Compensation Summary by Quarter report
- Performance Summary dashboard
  - Attainment Summary by Quarter report

- Performance Distribution report

The Plan Administrator should have access to all the dashboard pages that the Compensation Manager has access to, and the following Scenarios reports:

- Compensation Cost of Sales
- Compensation Cost Summary
- Incentive Investment Matrix
- Attainment versus Quota

The Sales Manager should have access to the following dashboard and reports:

- Performance Summary dashboard
  - Salesrep Ranking report
  - Attainment Summary by Quarter report
  - Compensation Summary by Quarter report





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# Glossary

## **attainment**

Indicates the achievement of a salesperson against a certain target for a certain performance measure. Transactions are typically added up to arrive at an attainment total (e.g. Attained Sales of \$200,000 this month on a Target of \$250,000). The comparison of Attainment to Target can be expressed as a percentage as well (e.g. Attainment percent of 80% this month on a Target of \$250,000).

## **base**

Base is the element of compensation paid regularly to a person or manager, regardless of performance.

## **commission**

Commission is a form of incentive payment and is typically paid as a direct portion of incoming revenue or margin. It is represented as a percentage of revenue or margin. Commissions can be paid against individual transactions such as orders or paid as a portion of total transactions for a period. An example commission could be "Pay 5% of all Sales Revenue to Salesperson A on a monthly basis".

## **commission rate**

This is the portion of transactions (such as orders) that are to be paid to the salespeople. This is typically expressed as a percentage. An example commission rate could be "Pay 5% of all Sales Revenue to Salesperson A on a monthly basis", where 5% is the commission rate

## **compensation plan**

Agreement between company and the employee as to the performance expected of the employee and the compensation for the performance at varying levels.

## **data aggregation**

Process of collecting data stored in multiple, disparate source system and consolidating it in a single data warehouse.

**data cleansing**

Process of establishing hierarchies and mapping data. Hierarchies exist for each dimension. Key elements addressed in the cleansing process include suppliers, items, and commodities. Minor elements include transformation to a common list of values, such as UOM.

**data mapping**

Process of assigning data from a source system to an established, standardized hierarchy. Includes reassignment of data to a standard value. For suppliers, this includes assigning multiple versions of a single supplier's name to a standard name.

**on target earning**

This defines the total earning potential for a salesperson or manager, including base, bonus, and commission earnings

**performance measure**

This identifies the performance that the company is interested in measuring as it relates to a specific salesperson.

**plan period**

This is the smallest period within the plan duration for which goals are set and attainment is measured. This can be a month, quarter, half-yearly, full year or other periods. Typically goals are set for the entire year, but attainment is measured on a monthly basis and payout is calculated on a monthly basis.

**sales credit**

The amount of attainment given to a specific Sales Resource, for a specific amount, on a specific date for a specific Performance Measures. For OIC, this is the amount Transaction once SCA has run.

**quota**

A Quota (or Target, Goal) is the target that a salesperson is expected to achieve in a certain period for a specific performance measure.

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# Index

## A

---

Architecture Overview, 1-2  
Attainment Summary by Quarter report, 6-1, 7-2  
Attainment versus Quota and Actual report, 8-2  
Attainment versus Quota by Plan report, 6-2, 9-1  
Attainment versus Quota report, 10-3

## C

---

Compensation Cost of Sales by Quarter report, 5-1  
Compensation Cost Summary dashboard, 5-1  
Compensation Cost Summary report, 8-1  
Compensation Manager, 2-3  
Compensation Summary by Quarter report, 5-2, 7-2  
concurrent program  
    Incentive Compensation Analytics – ODI, 4-4  
copy  
    incremental, 4-4  
currency, 3-4

## D

---

dashboard  
    Compensation Cost Summary, 5-1  
    Plan Comparison, 9-1  
    Plan Performance Summary, 6-1  
    Sales Manager Performance Summary, 7-1  
    Scenario Comparison, 8-1  
dashboards and reports overview, 1-4  
datamart overview, 1-3  
data structure, 4-5

DBLINK, A-1  
dimensions, 3-1

## E

---

Earnings Distribution by Attainment report, 10-2  
ETL Processing, 4-1

## F

---

facts, 3-3  
flattened hierarchy, 4-5

## G

---

glossary, Glossary-1

## I

---

Incentive Investment Matrix report, 6-2, 8-2, 9-2  
incremental copy, 4-4

## M

---

mapping  
    dashboard and user, 2-3  
maps, 4-3  
Metadata  
    setting up, A-1

## O

---

OBIEE  
    setting up, A-4  
ODI  
    setting up, A-2  
ODI Topology, A-2

- OIC Analytics
  - setting up, A-1
- Oracle Incentive Compensation Analytics for Oracle Data Integrator
  - overview, 1-1
- overview
  - datamart, 1-3
  - Plan Effectiveness dashboard, 10-1
- Overview
  - Architecture, 1-2
  - dashboards and reports, 1-4
  - OIC Analytics for ODI, 1-1
  - Technology, 1-2

## **P**

---

- periods, 4-1
- Plan Administrator, 2-3
- Plan Comparison dashboard, 9-1
- Plan Effectiveness dashboard, 10-1
- Plan Modeling, 1-3
- Plan Performance Summary dashboard, 6-1
- product hierarchy versioning, 4-6

## **Q**

---

- quota distribution
  - salesperson, 4-6

## **R**

---

- report
  - Attainment Summary by Quarter, 6-1, 7-2
  - Attainment versus Quota, 10-3
  - Attainment versus Quota and Actual, 8-2
  - Attainment versus Quota by Plan, 6-2, 9-1
  - Compensation Cost of Sales by Quarter, 5-1
  - Compensation Cost Summary, 8-1
  - Compensation Summary by Quarter, 5-2, 7-2
  - Earnings Distribution by Attainment, 10-2
  - Incentive Investment Matrix, 6-2, 8-2, 9-2
  - Sales Investment Matrix, 10-2
  - Sales Person Ranking, 7-1
- Responsibilities, 2-1

## **S**

---

- Sales Investment Matrix report, 10-2
- Sales Manager

- volume production, sales effectiveness, customer impact, 2-1
- Sales Manager Performance Summary dashboard, 7-1
- Sales Person Ranking report, 7-1
- Scenario Comparison dashboard, 8-1
- security, 2-5
- setting up
  - metadata components, A-1
  - OBIEE, A-4
  - ODI, A-2
  - OIC Analytics, A-1
  - users and access, A-4

## **T**

---

- Technology overview, 1-2

## **U**

---

- users and access
  - setting up, A-4

## **V**

---

- versioning
  - product hierarchy, 4-6