

**Oracle® Configuration Controls Governor**  
Implementation Workbook  
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## Oracle Configuration Controls Governor Implementation Workbook

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## Introduction

Configuration Controls Governor (CCG) monitors setup data in Oracle E-Business Suite and PeopleSoft Enterprise. It takes “snapshots” that document application setups; compares snapshots with one another, to show how application setups differ; and employs change tracking to monitor changes in setups.

This workbook is intended to guide you through the implementation of Configuration Controls Governor at your site. Many of the questions and planning activities posed in this workbook may require the input of management or other team members.

The workbook is organized into two sections:

- An Implementation chapter leads you through an examination of your business-application environment, then outlines steps for planning and implementing CCG at your site.
- A Best Practices chapter offers recommendations for the optimal implementation of key CCG functionality.



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## Implementation

To begin implementing Configuration Controls Governor, answer questions that will help you determine the scope of your effort. Then plan the implementation:

- Identify ERP instances to which CCG should connect.
- Collate information about CCG users you intend to create, roles they will fulfill, and “security groups” to which they will belong.
- Evaluate your setup documentation requirements. You should use the CCG snapshot feature to create a complete baseline of your setup for every ERP module. Beyond this, however, consider how often you may need to retake snapshots to accommodate milestones for your business application project, or inevitable change in setups (the pace of which may vary from one application to another). Moreover, consider archiving and purging requirements.
- Assess your change-tracking requirements — determine which setup objects need to have change tracking enabled, and whether users need to be alerted of changes (and, if so, which users and for which objects).

Having completed planning, use the *CCG Administration Guide*, *User Guide*, and either of two *Metadata Reference* documents (one for Oracle EBS, the other for PeopleSoft) to determine how to put the decisions you make here into effect.

### Scope

To plan for your use of CCG, have a general understanding of your organization, your business application environment (or project plan), and your goals for using CCG. Here are some questions for discussion about your organizational structure:

- Do you implement your ERP application in a single-organization or multi-organization setting?
- If multi-organization:
  - Number of operating units?
  - Number of sets of books or ledgers?
  - Number of inventory organizations?
  - Number of HR business groups?

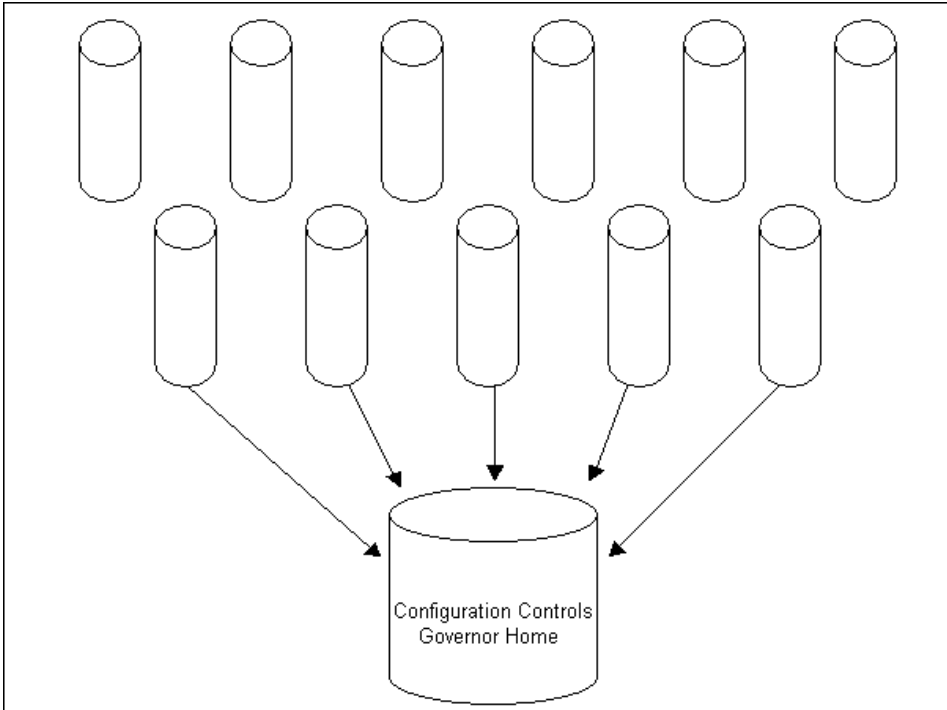
Understanding your current systems and your business applications project is equally important. Here are some questions for discussion:

- Business application system/project
  - What is the current lifecycle stage of your business applications project (for example, implementing, live/maintaining, upgrading)?
  - What are the key milestones of your project plan (for example, go-live dates, rollout dates)?
- Other systems
  - Are there business units in your organization that use other systems or other applications?
  - Do any of these other systems interface with your business applications?
- Configuration Controls Governor
  - What are the main reasons your organization purchased Configuration Controls Governor?
  - What do you hope to accomplish with Configuration Controls Governor?

Once you understand your business application environment and your project, you can begin to plan how to integrate CCG at your organization.

## Map Environment

Identify each database instance that needs to be configured as an ERP instance in CCG — each instance on which you wish to use CCG to create snapshots or track changes. Use the following diagram to map those business application instances. See the *Configuration Controls Governor Administration Guide* for information on configuring those instances.





## Security

CCG administrators can create users and assign roles to them. Each role provides access to a distinct set of CCG functionality. Roles include the following. (As you use the template below to record information about the users you intend to create, mark the check box for each role the first time you assign it to a user, to ensure that you have assigned each role to at least one user.)

- CCG User:** Primary user of the product. Creates snapshot and change tracking definitions, reviews and compares snapshots, reviews changes reported by change tracking, sets up change tracking queries and alerts, uses CCG to troubleshoot business application problems.

*Recommended User:* Superusers, project leads, business application managers, onsite consultants.

- Snapshot Scheduler:** Schedule snapshot definitions to run.

*Recommended User:* Superusers, project leads, business application managers, onsite consultants.

- CCG Developer:** Creates views of snapshots specific to a functional or business area. Uses MetaBuilder to create metadata — information about ERP objects for which CCG may take or compare snapshots, or track changes.

*Recommended User:* Superusers, project leads, business application managers, onsite consultants.

- Change Tracking Scheduler:** Schedule change tracking definitions to run.

*Recommended User:* System administrator or DBA. This role should be strictly controlled. We recommend one primary user and one backup user.

- Administrator:** Defines users and security groups, performs system maintenance, installs and maintains the CCG Home schema, configures ERP instances, manages CCG upgrades and patches.

*Recommended User:* System administrator or DBA. This role should be strictly controlled. We recommend one primary user and one backup user.

The following template contains space to record information appropriate for each field you will need to complete as you create a CCG user. As a planning exercise, reproduce and fill in the template once for each user you intend to create. See the *Administration Guide* for instructions on creating CCG users.

**Full Name:** \_\_\_\_\_

Login ID: \_\_\_\_\_ Password: \_\_\_\_\_

Email: \_\_\_\_\_ Department: \_\_\_\_\_

Valid From: \_\_\_\_\_ Valid Until: \_\_\_\_\_

Roles: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

CCG administrators also create security groups and assign CCG users to them. Each security group specifies an ERP instance and sets “scope” values, which limit group members’ access to information on the specified instance.

In Oracle EBS version 11i, scope values set the applications, business groups, organization units, and sets of books to which members of a group have access. In Oracle EBS version 12, scope values set applications, business groups, organization units, and ledgers to which members have access . In PeopleSoft, scope values select the applications and set IDs to which group members have access.

Questions for discussion: Do you need to limit access to particular applications (for example, HR, Payroll)? If so, should you limit organizations, business groups, sets of books, ledgers or set IDs?

The following template contains space to record information appropriate for each field you will need to complete as you create a security group. As a planning exercise, reproduce and fill in the template once for each group you intend to create. See the *Administration Guide* for instructions on configuring security groups.

**Security Group Name:** \_\_\_\_\_

Description: \_\_\_\_\_

ERP Instance: \_\_\_\_\_

Applications

Business Groups	Organizations	SOB/Ledgers	Set IDs
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Users

_____	_____
_____	_____
_____	_____

## Documentation

Configuration Controls Governor enables you to define and schedule snapshots, thus automating the documentation of your setup and of some operational data, and providing quick, up-to-date reports. You should plan how to use and maximize this snapshot functionality.

To receive the full benefit of CCG, create a complete baseline of your setup for every module as soon as possible. The easiest way to do this is to run all the snapshot definitions that are created automatically when you install CCG. This activity should be centralized to one person in your organization, to conserve table space and to promote data consistency. The output from the snapshot definitions can then be shared with appropriate users. Then schedule your snapshot definitions to run at a regular interval, either monthly or quarterly depending on your business needs.

Questions for discussion:

- What are your documentation objectives for each key milestone for your business application project?
- What are the documentation objectives for each business application instance?

- What are your archive requirements for CCG by instance? How long a history do you need to maintain in the CCG repository? How often will you purge the CCG repository? Where will these reports be archived?

The following template contains space to record information appropriate for each object you want to document. An “object” is essentially a set of database tables containing setup data pertaining to an application. You document them by creating CCG snapshots of them, either once or at regular intervals.

As a planning exercise, reproduce and fill in the template once for each object you intend to document. See the *User Guide* for information on creating and scheduling snapshots. Also, see the *Metadata Reference* (one each for Oracle EBS and PeopleSoft) for documentation of snapshot objects available from Oracle; see the *Administration Guide* for information on using a MetaBuilder to create snapshot objects.

ERP Instance: \_\_\_\_\_ Application: \_\_\_\_\_  
 Owner: \_\_\_\_\_ Baseline Date: \_\_\_\_\_  
 Snapshot Interval: \_\_\_\_\_ Archive (Y/N): \_\_\_\_\_  
 Purge Date: \_\_\_\_\_

## Change Tracking

Change Tracking is enabled by ERP instance. Part of the planning process is to determine the instances for which you need to enable change tracking, and to specify the setup objects that need to be monitored within those instances.

Change tracking is enabled through the application of triggers to setup tables in the business applications. So it’s important to consider carefully what objects you monitor. Give particular attention to any object that could be affected by a business application interface (i.e. Customers, Items), because it can insert a large amount of new records into the setup tables at once.

Change tracking is ideal for monitoring key setup objects such as opening and closing periods in General Ledger, creating new values related to your Chart of Accounts, or allowing (or not allowing) suspense posting to your Sets of Books as these have a direct impact on business. The rationale for enabling change tracking on some objects may be less clear and will depend on your business requirements.

Questions for discussion:

- Who are the appropriate decision makers for each business application installed at your site to decide what setup objects need to be change tracked?
- Which instances need to have change tracking enabled?
- Which setup objects need to be tracked in each instance?
- Are there email alerts that need to be created for certain setup objects?

To plan for change tracking:

1. Work backwards. Decide on what objects are *not* important to your business for change tracking first. This will narrow down the list of available objects to track so that you can make more educated decisions for your business.

2. Group objects into the following categories to determine their importance for change tracking. Objects that do *not* fit into these categories may not need to be enabled for change tracking:
  - **Primary Application Functionality.** Setup objects that relate to the primary functions of each business application (e.g., Invoices and Payments in AP, Receipts and Transactions in AR, etc.).
  - **System Security and Integrity.** Setup objects that affect overall system security and integrity at your site (e.g., Profile Options, Users and Responsibilities/Roles, etc.).
  - **Financial Limits/Document Approvals.** Setup objects related to the financial limits of users of business applications (e.g., Invoice approval, Journal approval, PO approval, etc.).
  - **Subledgers Interaction with General Ledger.** Setup objects that affect the interface of the sub-ledger information to the General Ledger (e.g., Financial Options, Auto Accounting Rules, etc.).
  - **General Ledger Specifics.** Setup objects related to the financial integrity of business applications (e.g., Accounting Rules, Accounting Flexfield, Sets of Books, Value Set Values, etc.).
  - **Organizational Structure.** Setup objects related to your overall organizational structure (e.g., Organization Hierarchy, etc.).
3. Examine the specifics of your business. After all, no one knows your business as well as you.

For example, what setup objects, outside of those listed above, are critical to your business? Track them.. Could any setup objects insert a large number of records into a setup table at once and create a potential performance impact in production (custom interfaces, APIs, etc.)? If yes, test them thoroughly before implementing them in your production environment.

4. Plan queries and alerts. Determine if any setup objects need to have email alerts created for them.

A query specifies fields included within a change-tracking report. An alert is associated with a query, and informs designated users by email that changes have been made to fields included in the query. See the *User Guide* for information on creating queries and alerts.

Use caution when defining queries and alerts. An excessively broad query could generate too many email messages, leading recipients to discount or ignore them. It's recommended that queries always be created at the object or field level.

See the *User Guide* for information on creating, editing, and running change-tracking definitions.

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## Best Practices

Configuration Controls Governor is an invaluable tool for managing business application configurations, whether you're implementing, in production, or upgrading. This chapter provides guidelines for implementing CCG best practices.

### System Maintenance

Like any application, CCG requires some general system maintenance to ensure its smooth operation. The maintenance required, however, is usually minimal.

### Define Archiving and Purging Requirements

The data associated with your snapshots, comparisons and change tracking details will remain in the CCG repository until you decide to purge it. Prior to purging, your organization should define your archiving requirements. For example, will you keep only the most recent snapshot set for a particular application and purge all others? Or, will you always keep six months of history? Your requirements might vary from instance to instance (e.g., Test vs. Production) or be influenced by management and audit requirements.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	CCG users, Administrator	
<b>What?</b>	Purge and/or archive snapshot, comparison, and change tracking history	
<b>When?</b>	Based on organization's business requirements	
<b>Where?</b>	By ERP instance, in the CCG Home instance	
<b>Why?</b>	Part of general maintenance, to free up table space in the CCG Home instance	

### Define CCG Patching Requirements

Oracle releases patches for CCG from time to time. These patches usually update existing metadata or provide new metadata and support for business applications and

objects. Set a patching policy, decide who will be responsible for staying informed of patch releases, and decide who will be responsible for applying patches.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Project Lead to stay informed of patch releases; DBA to apply patches	_____
<b>What?</b>	CCG patches	_____
<b>When?</b>	As patches are released	_____
<b>Where?</b>	CCG Home instance	_____
<b>Why?</b>	Minimize product issues and maximize new functionality	_____

## Naming Conventions

Using naming conventions for snapshot and change tracking definitions will help you organize, group, and find your definitions. The names determine how definitions are listed in the workbenches and search results, so a naming convention simplifies the identification of definitions or occurrences. Definitions can be shared among users in your organization, so a naming convention clearly communicates what is being documented or tracked.

For snapshot definitions, the following naming convention is recommended:

*APPLICATION+OBJECT NAME+DB INSTANCE+FILTER INFORMATION*

For example, for a snapshot definition of the Accounts Payable application Payables Options object, in a production environment for a USA organization, might be given the following name

AP Payables Options in Prod for USA

We do not recommend placing the time or date in definition names, because definitions can be performed an unlimited number of times. Time and date information is captured in each run and can easily be identified at the occurrence level.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	All CCG users	_____
<b>What?</b>	All CCG definitions	_____
<b>When?</b>	Always	_____
<b>Where?</b>	All ERP instances	_____
<b>Why?</b>	Easier recognition of what is being documented or compared	_____

## Snapshots

Snapshots are an essential part of documenting your business application environment. They can be used to:

- Document setup prior to implementing customizations.
- Maintain detailed information about your environment for auditors and historical reference.
- Document milestones within your organization as business requirements change.
- Facilitate interactions with your business application manufacturer's support team.

## Document Milestones

A milestone is any major event that impacts your business applications. Some common milestones are:

- An upgrade to a newer version of a business application.
- Application of a significant patch or patchset to the business applications.
- Major changes in your business requirements that impact setup values.
- Addition of a new operating unit or organization.
- An event/project that is specific to your organization.

Whenever milestones in your organization occur, snapshots should be taken both before (if a baseline of your setup does not already exist) and after the event occurs.

To receive the full benefit of CCG, we recommend that you create a complete baseline of your setup for every module as soon as possible. The easiest way to do this is to run all of the snapshot definitions that are created automatically when you install CCG. This activity should be centralized to one person in your organization to conserve table space and to promote data consistency. The output from the snapshot definitions can be shared with appropriate users. We also recommend that you schedule your definitions to run on a regular interval, either monthly or quarterly depending on your business needs.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Key functional users, process owners	_____
<b>What?</b>	All setup objects affected by milestone	_____
<b>When?</b>	Before (if baseline does not already exist) and after event	_____
<b>Where?</b>	Production instance, or any other instance where applicable	_____
<b>Why?</b>	Maintain historical record of all changes	_____

## Snapshot Before and After Applying Business Application Patches

Many customers ask whether CCG change tracking will capture unexpected changes made by business application patches. Change tracking is not the best way to accomplish this; the best way is to run snapshot sets before and after applying the patch. You can then run a comparisons to identify any unexpected changes caused by the patch.

In fact, we recommend that you disable change tracking prior to applying business application patches, and re-enable it afterwards. This ensures that change tracking triggers will not interfere with the application of the patch.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Key functional users, process owners, DBA	_____
<b>What?</b>	All setup objects related to the business application patch	_____
<b>When?</b>	Before and after patch application	_____
<b>Where?</b>	Production instance, or any other instance where applicable	_____
<b>Why?</b>	Maintain historical record of setup data to identify unexpected value changes caused by a patch	_____

## Provide Audit and Regulatory Information

One part of the audit process is validating the integrity and security of your application environment. Using snapshots, you can maintain a historical record that can be reviewed easily by auditors. You can also use snapshots to prove your organization's regulatory compliance (e.g., ISO 9000, HIPAA, FDA, SOX, etc.).

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Audit and accounting personnel, process owners, key functional users	_____
<b>What?</b>	All setup objects by application	_____
<b>When?</b>	As system setup changes	_____
<b>Where?</b>	Production instance	_____
<b>Why?</b>	Maintain system integrity and security	_____

## Use Snapshots to Facilitate Support-Issue Resolution

When logging a support issue with your business applications' manufacturer (e.g., a TAR with Oracle Support Services) about a bug or functional problem with a specific application, one of the first things they often request are setup details (profile option values, application setup, flexfield structures, etc.). Using snapshots, you can



quickly document any setup object in detail, and send the output to the support team to expedite and facilitate resolution of your TAR. Snapshot templates can be used to respond to specific configuration requests.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Functional and technical users	_____
<b>What?</b>	Setup details as requested by business application manufacturer's support team	_____
<b>When?</b>	Whenever support team requests setup details about your environment	_____
<b>Where?</b>	Production instance, or the instance where the problem is occurring	_____
<b>Why?</b>	Provide complete and thorough documentation and expedite resolution of your TAR	_____

### Snapshot Before Refreshing or Dropping an Instance

In most organizations, databases are continually refreshed or dropped due to limited system resources or to other business requirements. After the refresh, users sometimes find that functionality in the new instance is not the same as it had been before the refresh. Therefore we recommend that you fully document a business application instance prior to dropping or refreshing it. This information will be easier to retrieve than a backup copy, and can be compared easily to the new instance's information.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	DBAs, technical users, process owners	_____
<b>What?</b>	Document all setups prior to refreshing or dropping an instance	_____
<b>When?</b>	Prior to refreshing or dropping an instance	_____
<b>Where?</b>	Instance being refreshed or dropped	_____
<b>Why?</b>	Maintain a historical record of your setup values in case functional issues arise; easier to retrieve than a backup copy	_____

### Use Snapshots to Supplement Planning Documents

Many customers use templates provided by their business applications' manufacturer to document their initial application setups (e.g., Oracle's BR-100 or AIM). These documents are great for planning, and for routing your application configurations through your organization's internal approval process. The problem with these documents is that they are laborious to maintain and usually become outdated.

To meet your organization's documentation needs, we recommend using the manufacturer's documents as planning tools during your implementation, and relying on CCG snapshot reports for maintaining records of your setup data.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Key project team members, onsite consultants	_____
<b>What?</b>	All setup objects by application	_____
<b>When?</b>	As needed during implementation	_____
<b>Where?</b>	Production instance, or any other instance where applicable	_____
<b>Why?</b>	Save time, ensure accuracy of setup documentation	_____

## Comparing Snapshots

The CCG snapshot comparison functionality is a powerful tool for troubleshooting business application functionality problems related to setups, maintaining the integrity of your business applications, and standardizing or synchronizing setup and operational data.

## Use Comparisons to Troubleshoot

Use comparisons to identify differences between ERP instances. For example, when business application functionality works in one instance but not another, you can compare the instances' setups to quickly recognize differences that could cause the problem.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Key functional users, technical users, support staff	_____
<b>What?</b>	Setup details related to a particular functional area in an application where a problem is occurring	_____
<b>When?</b>	As problems occur	_____
<b>Where?</b>	Production instance, or any other instance where applicable	_____
<b>Why?</b>	Identify setup differences (between instances or entities) that could cause your problem	_____

## Use Comparisons to Maintain Data Consistency

Comparisons can verify that setup records conform to organization standards, and that no unexpected differences exist between one instance and another.

A same-records comparison enables you to verify that setup records are the same on any two instances (for example, Test and Production). Alternatively, a “force comparison” (a one-to-many comparison) lets you compare all setup records to a “gold standard” record, to ensure conformity of other instances to that standard across your organization.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Key functional users, process owners	_____
<b>What?</b>	All multi-organization setup options	_____
<b>When?</b>	Periodically, based on your business requirements	_____
<b>Where?</b>	Between instances, operating units, sets of books, ledgers, inventory organizations, points in time, and so on.	_____
<b>Why?</b>	Identify differences between entities	_____

## Use Comparisons to Standardize Rollouts

As your business changes, CCG can document changes and help you ensure that new entities (operating units, sets of books, etc.) conform to your existing setup standards. A standard comparison (one-to-one comparison) lets you verify that entities are set up the same on two instances (e.g., Test and Production) prior to going live, helping you identify and resolve problems before rollout. Two types of comparisons can help you with rollouts:

- A same-records comparison lets you compare setups between instances to ensure consistency. For example, once a new organization is set up in a test instance, you must create the same setup in your production instance. How will you know if the setup is the same in both? A same-records comparison quickly identifies any differences, so you can make corrections before you go live.
- A “force comparison” lets you specify one organization as your gold standard, and then compare its setup to other organizations.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Key functional users, process owners	_____
<b>What?</b>	Roll-outs of new entities	_____
<b>When?</b>	Whenever new entities are rolled out	_____
<b>Where?</b>	Production	_____
<b>Why?</b>	Ensure that new-entity setup conforms to your organization's standards	_____

## Change Tracking

Change is inevitable; CCG captures changes through change tracking, documenting them in detail to create a complete audit trail. CCG change tracking can be used to monitor the setup of your production environment, ensure data integrity and system security for audit purposes, troubleshoot functionality problems, and capture trigger history.

Setups impact how transactions are processed. Thus, it is important to maintain the integrity of your system by monitoring changes to key setup objects (i.e., those objects which impact your business or affect system security or integrity). Change tracking can also troubleshoot functional issues when problems occur.

## Create a Complete Audit Trail

Part of the audit process is validating the integrity and security of your application environment. Using change tracking, you can maintain a historic record that can easily be reviewed by auditors. We recommend discussing CCG change tracking capabilities with your auditors to find out what information they require.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Audit and accounting personnel, key functional users, process owners	_____
<b>What?</b>	Monitor key setup objects that could impact system security and integrity	_____
<b>When?</b>	Continuously	_____
<b>Where?</b>	Production instance, or any other instance where applicable	_____
<b>Why?</b>	Ensure system security and integrity; create a complete audit trail of all changes to setup	_____

## Monitor Change Tracking Object History

Monitoring your setups with change tracking ensures the integrity of your environment. When the integrity of your setups is called into question and there is no record of changes, you will want to know when the setups were vulnerable to untracked changes. The Object History report gives you a complete history of when change tracking was enabled and disabled. This report should be reviewed on a periodic basis.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Technical users, process owners, support staff	_____
<b>What?</b>	Run the Object History report to identify when setup objects have been enabled or disabled for change tracking	_____
<b>When?</b>	When a change is discovered but no details of the change exist within Change Tracking	_____
<b>Where?</b>	Production instance, or any other instance where applicable	_____
<b>Why?</b>	Identify when your organization has been vulnerable to untracked changes, and take action	_____

## Use Alerts to Take Action on Sensitive Changes

Alerts let you send email notifications when setup changes occur. These notifications let you take action on sensitive or unauthorized changes to your setup data. Alerts are generated by queries that you create in the change tracker, and can be defined as broadly or specifically as your business requirements dictate.

Use caution when defining queries and alerts. A query that is too broad could generate too many email messages, leading recipients to discount or ignore them. We recommend that queries always be created at the object or field level.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Managers and process owners	_____
<b>What?</b>	Alerts for changes to sensitive objects	_____
<b>When?</b>	Every time a change occurs to an change associated with an alert	_____
<b>Where?</b>	Production instance, or any other instance where applicable	_____
<b>Why?</b>	Take action on sensitive or unauthorized changes to your setup data	_____

## Templates

Snapshot templates can create custom views of snapshot reports, letting you “slice and dice” the data as needed. You can use templates to create custom views, check for setup conformity, or create audit reports. (See the *Administration Guide* for information on creating templates.)

## Use Templates to Customize Snapshots

Some snapshot reports contain large amounts of data and may offer more detail than you need. Templates offer an excellent way to select only the key setup fields you want to review. For example, when using the Banks object, you could create a template to view just the banks’ Payable Document details.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Administrator or CCG user	_____
<b>What?</b>	Templates to create custom snapshot reports	_____
<b>When?</b>	As needed, based on business requirements	_____
<b>Where?</b>	Snapshots	_____
<b>Why?</b>	Zero in on key setup fields	_____

## Use Templates to Confirm Setup Conformity

Within a multi-organizational structure, certain fields should always be populated in the same way, based on your business requirements. The same is often true of primary setup records (e.g., Items, Customers or Suppliers). Templates can be used to ensure this conformity across your organizations or primary records.

Templates enable you to create custom views of any setup object by specifying the key fields that should be included in the snapshot. Once the template is applied to the snapshot, it will only show the fields specified, thus allowing you to quickly check setup conformity.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Administrator or CCG user	_____
<b>What?</b>	Templates to check setup conformity across orgs or primary records	_____
<b>When?</b>	As needed, based on business requirements	_____
<b>Where?</b>	Snapshots	_____
<b>Why?</b>	Ensure setup conformity dictated by your business requirements	_____

## Use Templates to Create Audit Reports

Auditors are concerned not only with financial numbers but also with system security and integrity. Business applications provide ways, through various setup forms, to let your organization define security. Auditors want to know what these settings are, and how system security is implemented.

You can use templates to create reports based on audit requirements. For example, auditors do not need to know how every business application option is configured within your organization. Rather, they are likely interested in key options that affect system security and transaction processing. Templates let you create a custom snapshot of options to accomplish this.

	Best Practice Guidelines	Your Organization
<b>Who?</b>	Administrator or CCG user	_____
<b>What?</b>	Templates to create custom snapshots based on system audit requirements	_____
<b>When?</b>	As needed, based on audit requirements and specifications	_____
<b>Where?</b>	Snapshots of Setup objects related to system security and integrity	_____
<b>Why?</b>	Faster, more efficient audits	_____