Oracle

Sales Cloud

Getting Started with Oracle Incentive Compensation

Release 12
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Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon to access Oracle Applications Help in the application. If you don’t see any help icons on your page, click the Show Help icon in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using Applications Help

Watch: This video tutorial shows you how to find help and use help features.

Additional Resources

- Community: Use Oracle Applications Customer Connect to get information from experts at Oracle, the partner community, and other users.

- Guides and Videos: Go to the Oracle Help Center to find guides and videos.

- Training: Take courses on Oracle Cloud from Oracle University.

Documentation Accessibility

For information about Oracle's commitment to accessibility, see the Oracle Accessibility Program.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 About this Guide

Audience and Scope

This guide provides information on how implementors and administrators can get started implementing an incentive compensation test environment. It leverages the default settings provided by Oracle and does not provide detailed explanations of all available features.

Related Guides

You can refer to the following related guides to understand more about the business flows and functionality covered in this guide.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Securing Incentive Compensation</td>
<td>Describes role-based access controls provided for Oracle Incentive Compensation, and the tasks required to implement these controls so that users have appropriate access to data and functions.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Incentive Compensation</td>
<td>Describes tasks to configure and set up Oracle Incentive Compensation.</td>
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<td>Oracle Sales Cloud Using Incentive Compensation</td>
<td>Describes the user tasks for the incentive compensation business process, from creating and managing compensation plans to reviewing and monitoring incentive plans and performance data.</td>
</tr>
</tbody>
</table>

Related Topics

- Oracle Help Center
2 Signing In and Getting Oriented

About Signing In and Getting Oriented

Before you sign in for the first time, read the environment access e-mail, complete the tasks in the Service Administrator Action List, and familiarize yourself with the different user interfaces and basic navigation.

Signing In for the First Time

When your environment is ready, Oracle sends an e-mail to the person designated as the administrator when you signed up with Oracle Sales Cloud. This e-mail includes the link to your service, a temporary password, and instructions on how to access the Service Administrator Action List. You must follow the instructions in the actions list before signing in.

Related Topics

- Service Administrator Action List
3 Setup Task Overview

Enabling Offerings: Explained

When planning your implementation, you decide what business processes your organization or company performs or supports. These decisions determine the offerings and functional areas you want to implement. You then configure the offerings and functional areas that support the activities your organization or company performs. During the configuration process, you specifically enable offerings and functional areas for use before you implement them.

Enabling Offerings and Functional Areas

Use the Setup and Maintenance work area to help decide which offerings to enable for implementation. Once you decide to use an offering, you can select the Configure button to choose the configuration details and enable the offering, associated functional areas, and features. All the base functional areas of an offering are automatically enabled for implementation when you enable the parent offering. You choose which optional functional areas to enable. The functional areas appear in an expandable and collapsible hierarchy to facilitate progressive decision making for implementation.

Enabling Features

Features are optional or alternative business rules or methods used to fine-tune business processes and activities supported by an offering or a functional area. If features are available for the offering or functional areas, you can enable them to help meet your business requirements, if desired. In general, the features are set with a default configuration based on their typical usage in most implementations. You should always review the available features for the offering and functional areas and select them as appropriate. Dependent features appear visible when the feature choice they depend on is selected for implementation.

Enabling Offerings: Procedure

You enable offerings to customize the functionality that matches the services you plan on implementing.

Enabling Offerings

To enable offerings, follow these steps.

1. Open the Setup and Maintenance work area (Navigator > Setup and Maintenance).
2. In the Setup and Maintenance Offerings page, select the offering you’re using, then click Configure.
3. In the Configure page, select the Enable check box for the offering. Also select the Enable check box for each of the functional areas you want to use.
4. Click the Features icon for the offering or functional area you have enabled, then enable any features you require. Select Done when complete.
5. Select Done to return to the Offerings page then repeat the same steps for each of the offerings you are using.
Performing Incentive Compensation Setup Tasks

For most implementation setup activities, you access the setup pages by first going into the Setup and Maintenance work area and finding the Incentive Compensation Offering. The Setup and Maintenance work area is also known as the Functional Setup Manager.

Use the following procedure to access the Setup and Maintenance work area:

1. Sign in as a user with access to the setup areas, such as the initial user, another implementation user, or the incentive compensation administrator.

   The incentive compensation administrator does not have the same setup permissions as an implementation user. She has permissions required to set up and administer incentive compensation features, but not the higher-level permissions required to implement enterprise and security features. For more information about setting up users, see the Oracle Sales Cloud Securing Incentive Compensation guide.

2. Navigate to Setup and Maintenance.
3. Select the Incentive Compensation offering.

Downloading Setup Resources

The About Incentive Compensation region lists helpful resources for your implementation. It includes the offering content implementation guide and the complete list of setup task lists and tasks included in the Incentive Compensation Offering.

Setup Functional Areas and Tasks

The setup tasks are organized into functional areas. Use the following procedure to access the setup tasks in the Setup and Maintenance work area:

1. Sign in as a user with access to the setup areas, such as the initial user or another implementation setup user.
2. Navigate to Setup and Maintenance.
3. Select the Incentive Compensation offering.
4. In the Administration region, verify that the offering is provisioned. If it is not provisioned, then contact the help desk. Select the Setup button to navigate to the setup tasks.
5. The list of functional areas display in the Functional Areas region. The asterisk (*) indicates there are tasks that are required for the functional area. Select a functional area.
6. When a functional area is selected, the tasks for the functional area are displayed. By default, only the required tasks are displayed. To display all the tasks, select the All Tasks show option.

   **Tip:** If you know the setup task name, then you can search for it by entering it in the search field at the top of the Setup and Maintenance page or the Setup: Incentive Compensation page. You can use the percent sign (%) as a wildcard when searching.

7. Select the task name to navigate to the setup page.

   Some tasks require you to select a scope. For Incentive Compensation setup tasks, the scope is the business unit. Tasks which require scope must be set up for each incentive compensation business unit.
4 Creating Other Setup Users

About Creating Users for Incentive Compensation

This topic provides information about creating users in Incentive Compensation. Review this information before you create setup and application users.

User Types

When you sign up with Incentive Compensation, you receive the user name and password for one initial user. The initial user is provisioned with the privileges necessary to perform many implementation tasks, including creating other users. The following are the different types of users that you can create when you sign in to the application as the initial user.

- Setup users
  
  You can provision setup users with the same job roles as the initial user so that they can perform all the standard implementation setup tasks for your Incentive Compensation implementation. Setup tasks include managing security, enterprise setup, and creating other users, including other users with the same privileges. The roles assigned to the initial user are:
  
  - Application Implementation Consultant job role
  - IT Security Manager job role
  - Application Diagnostic Administrator job role

- Incentive compensation application administrators

  Incentive compensation administrators are provisioned with the Incentive Compensation Application Administrator job role, which includes permission to manage incentive compensation parameters, calendars, and custom qualifiers.

  Incentive compensation administrators cannot configure security roles or perform tasks related to enterprise setup.

  To create incentive compensation administrators, follow the same procedure outlined in the topic Creating Application Users for Incentive Compensation: Worked Example.

- Application users

  Application users are provisioned with job and abstract roles according to the resource role they are assigned. The provisioned job roles do not permit application users to perform implementation tasks, but they can perform a functional setup within the application, depending on their role.

  Application users can be provisioned with the following roles:
  
  - The job roles that they require to perform their job
  - The participant or participant manager abstract role
  - The Employee or the Contingent Worker abstract role, depending on the employee type of the user
Note: The user types outlined above are suggestions. The privileges granted to any user are entirely dependent on the assigned job and abstract roles so, for example, you can create an application user who is also a setup user if you want.

Methods of Creating Users

You can create users in either of the following ways. You can:

- Create users individually in the Manage Users work area. You can navigate to this work area using the Navigator menu from any application page.
  
  Use this method to create all setup users, and to create application users unless you are creating a large number of users.

- Import users from a file using the File-Based Data Import group of tasks from the Setup and Maintenance work area.
  
  Import users from a file only if you have a large number of users to create. To import users, you must understand how user attributes are represented in Incentive Compensation and how to map the attributes in your file to the attributes required by the application. You cannot import setup users because the import process requires you to import sales resources.
  
  See Understanding File-Based Data Import: Getting Started and other help topics on file import.

Tasks You Accomplish by Creating Users

When you create users, you also accomplish the tasks listed in the following table. Not all the tasks apply to setup users because they are not created as resources in the application.

<table>
<thead>
<tr>
<th>Task Accomplished</th>
<th>Application Users</th>
<th>Setup User</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send automatic e-mail notifications containing the user names you entered and automatically generated temporary passwords.</td>
<td>Yes</td>
<td>Yes</td>
<td>The application sends the notifications to the user or to an administrator only once, either on creation or later, depending on the setup.</td>
</tr>
<tr>
<td>Automatically provision the job and abstract roles that provide the security settings users require to do their jobs.</td>
<td>Yes</td>
<td>Yes</td>
<td>Job and abstract roles are provisioned based on the autoprovisioning rules discussed in related security topics.</td>
</tr>
<tr>
<td>Create rudimentary employee records that can be used by Oracle HCM Cloud if you have implemented it, or if you implement it in the future.</td>
<td>Yes</td>
<td>Yes</td>
<td>You must specify each user as either an employee or as a contingent worker.</td>
</tr>
</tbody>
</table>

Creating Basic Oracle HCM Cloud Employee Records

When you create application users, you must specify information that is used to create basic employee records for the Oracle HCM Cloud application.
You must specify the following information for the employee record:

- Person Type
- Legal Employer
- Business Unit
- Manager (Required for Participant Managers)

For information about these employee-related values, see the topic Creating Application Users for Incentive Compensation: Worked Example.

Creating Rules to Automatically Provision Job Roles to Incentive Compensation Users

Before you create Incentive Compensation Cloud application users, you must create the rules to automatically provision them with the job roles they require. The rules use the values that you select when importing employee resources or when manually entering users as the trigger condition. You must create a separate rule to provision each incentive compensation security job role.

Creating a Provisioning Rule

1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area.
3. Search for and open the Manage HCM Role Provisioning Rules task.

   The Manage Role Mappings page appears.

4. Click Create.

   The Create Role Mapping page appears.

5. In the Mapping Name field, enter a name that will help you identify the mapping, for example, Incentive Compensation Analyst.

6. In the Conditions region, select the job or resource role which best identifies the employees that you want to provision. For example, select the job Incentive Compensation Analyst to create a provisioning rule for the analyst.

7. Select Active from the HR Assignment Status list.

   This additional condition ensures that the provisioned roles are automatically removed if the user is terminated in Global Human Resources.

8. In the Associated Roles region, click Add to add the job roles you want to provision. For example, select the job Incentive Compensation Analyst to create a provisioning rule for the analyst.

9. Make sure the Autoprovision option is selected for all the roles.

10. Click Save and Close.
Role Provisioning and Deprovisioning: Explained

You must provision roles to users. Otherwise, they have no access to data or functions and can’t perform application tasks. This topic explains how role mappings control role provisioning and deprovisioning. Use the Manage Role Provisioning Rules or Manage HCM Role Provisioning Rules task to create role mappings.

Role Provisioning Methods

You can provision roles to users:

- Automatically
- Manually
  - Users such as line managers can provision roles manually to other users.
  - Users can request roles for themselves.

For both automatic and manual role provisioning, you create a role mapping to specify when a user becomes eligible for a role.

Role Types

You can provision data roles, abstract roles, and job roles to users. However, for Oracle HCM Cloud users, you typically include job roles in HCM data roles and provision those data roles.

Automatic Role Provisioning

Users acquire a role automatically when at least one of their assignments satisfies the conditions in the relevant role mapping. Provisioning occurs when you create or update worker assignments. For example, when you promote a worker to a management position, the worker acquires the line manager role automatically if an appropriate role mapping exists. All changes to assignments cause review and update of a worker’s automatically provisioned roles.

Role Deprovisioning

Users lose automatically provisioned roles when they no longer satisfy the role-mapping conditions. For example, a line manager loses an automatically provisioned line manager role when he or she stops being a line manager. You can also manually deprovision automatically provisioned roles at any time.

Users lose manually provisioned roles automatically only when all of their work relationships are terminated. Otherwise, users keep manually provisioned roles until you deprovision them manually.

Roles at Termination

When you terminate a work relationship, the user automatically loses all automatically provisioned roles for which he or she no longer qualifies. The user loses manually provisioned roles only if he or she has no other work relationships. Otherwise, the user keeps manually provisioned roles until you remove them manually.
The user who’s terminating a work relationship specifies when the user loses roles. Deprovisioning can occur:

- On the termination date
- On the day after the termination date

If you enter a future termination date, then role deprovisioning doesn’t occur until that date or the day after. The Role Requests in the Last 30 Days section on the Manage User Account page is updated only when the deprovisioning request is created. Entries remain in that section until they’re processed.

Role mappings can provision roles to users automatically at termination. For example, a terminated worker could acquire the custom role Retiree at termination based on assignment status and person type values.

**Reversal of Termination**

Reversing a termination removes any roles that the user acquired automatically at termination. It also provisions roles to the user as follows:

- Any manually provisioned roles that were lost automatically at termination are reinstated.
- As the autoprovisioning process runs automatically when a termination is reversed, roles are provisioned automatically as specified by current role-provisioning rules.

You must reinstate manually any roles that you removed manually, if appropriate.

**Date-Effective Changes to Assignments**

Automatic role provisioning and deprovisioning are based on current data. For a future-dated transaction, such as a future promotion, role provisioning occurs on the day the changes take effect. The Send Pending LDAP Requests process identifies future-dated transactions and manages role provisioning and deprovisioning at the appropriate time. These role-provisioning changes take effect on the system date. Therefore, a delay of up to 24 hours may occur before users in other time zones acquire their roles.

**Assigning Security Profiles to Abstract Roles: Explained**

These abstract roles are predefined in Oracle HCM Cloud:

- Employee
- Contingent Worker
- Line Manager

Users with these roles can sign in and open application pages. However, they have no automatic access to data. For example, employees can open the Directory but their searches return no results. Line managers can open the Directory but can’t see data for their organizations. To enable basic HCM data access for users with abstract roles, you assign security profiles directly to those roles.

**Predefined Security Profiles to Assign to Abstract Roles**

This table identifies the predefined security profiles that you can assign directly to the Employee, Line Manager, and Contingent Worker abstract roles.
### Security Profile Type

<table>
<thead>
<tr>
<th>Security Profile Type</th>
<th>Employee</th>
<th>Contingent Worker</th>
<th>Line Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person</td>
<td>View Own Record</td>
<td>View Own Record</td>
<td>View Manager Hierarchy</td>
</tr>
<tr>
<td>Public person</td>
<td>View All Workers</td>
<td>View All Workers</td>
<td>View All Workers</td>
</tr>
<tr>
<td>Organization</td>
<td>View All Organizations</td>
<td>View All Organizations</td>
<td>View All Organizations</td>
</tr>
<tr>
<td>Position</td>
<td>View All Positions</td>
<td>View All Positions</td>
<td>View All Positions</td>
</tr>
<tr>
<td>Legislative data group</td>
<td>View All Legislative Data Groups</td>
<td>View All Legislative Data Groups</td>
<td>View All Legislative Data Groups</td>
</tr>
<tr>
<td>Country</td>
<td>View All Countries</td>
<td>View All Countries</td>
<td>View All Countries</td>
</tr>
<tr>
<td>Document type</td>
<td>View All Document Types</td>
<td>View All Document Types</td>
<td>View All Document Types</td>
</tr>
<tr>
<td>Payroll</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>View All Payrolls</td>
</tr>
<tr>
<td>Payroll flow</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>View All Flows</td>
</tr>
</tbody>
</table>

After implementation, you may want to change aspects of this data access. For example, you may want to create your own security profiles and assign those directly to abstract roles.

**Note:** Such changes apply to all users who have the abstract role.

### HCM Data Roles

Users who have abstract roles are likely to gain additional data access from the HCM data roles that you define for their job roles. For example, you may create an HCM data role for benefits representatives to access person records in a legal employer. Such data access is in addition to any access provided by abstract roles.

**Related Topics**
- Assigning Security Profiles to Abstract Roles: Worked Example

### Creating Setup Users for Oracle Incentive Compensation: Worked Example

This topic describes how to create setup users. The initial user you receive when you activate Oracle Incentive Compensation can perform all of the application setup tasks. As a best practice, Oracle recommends that you create additional setup users with the type of broad setup privileges Oracle provides to the initial user you received.

To create the setup user in this example you do the following:

1. Create a job called Setup Administrator.
You create this job for creating setup users only.

2. Create a provisioning rule that automatically provisions the following security job roles to all users with the Setup Administrator job.

<table>
<thead>
<tr>
<th>Job Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Diagnostics Administrator</td>
<td>Provides access to diagnostic tests and data.</td>
</tr>
<tr>
<td>Application Implementation Consultant</td>
<td>Provides access to all setup tasks across all products.</td>
</tr>
<tr>
<td>IT Security Manager</td>
<td>Provides access to security tasks, including the ability to assign other enterprise roles.</td>
</tr>
</tbody>
</table>

3. Create each setup user as a user of type employee with the Setup Administrator job.

Creating the Job for Provisioning Setup Users

Use this procedure to create a job that you can use to assign setup users with the same implementation privileges as the initial user. You use this job as a condition in the provisioning rule you create to assign users with roles.

1. Sign in as the initial user.
2. Navigate to the Setup and Maintenance work area.
3. Search for and open the Manage Job task.
   The Manage Jobs page appears.
4. Click Create.
   The Create Job: Basic Details page appears.
5. Enter the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Setup Administrator</td>
</tr>
<tr>
<td>Code</td>
<td>SetupAdministrator. (No spaces)</td>
</tr>
</tbody>
</table>

6. Click Next at the top of the page.
7. Click Submit on the next page, and click OK when the warning is displayed.
   The job might take a couple of minutes to create. You can use search on the Manage Job page to verify that it has been created.

Creating the Provisioning Rule for Setup Users

Use this procedure to create a provisioning rule that automatically provisions users assigned the Setup Administrator job with the job roles required to perform the initial setup of Incentive Compensation.

1. Navigate to the Setup and Maintenance work area.
2. Search for and open the Manage HCM Role Provisioning Rules task.

   The Manage Role Mappings page appears.

3. Click Create.

   The Create Role Mapping page appears.

4. In the Mapping Name field, enter a name, for example, Setup User.

5. In the Conditions region, select Setup Administrator, the job you created earlier, from the Job list. If the job does not appear in the list, click Search and search for it using the full name.

6. Select Active from the HR Assignment Status list.

   This additional condition ensures that the provisioned roles are automatically removed if the user is terminated.

7. In the Associated Roles region, click Add to add the following job roles:
   - Application Implementation Consultant
   - IT Security Manager
   - Application Diagnostics Administrator
   - Sales Analyst (required for Sales Predictor)

8. Make sure the Autoprovision option is selected for each of the job roles.

9. Click Save and Close.

Creating the Setup User

Use the following steps to create other setup users.

1. In the Navigator, select the Manage Users link under the My Team heading.

   The Manage Users page appears.

2. Click Create.

   The Create User page appears.

3. Enter the user’s name and a unique e-mail in the Personal Details region.

   The application automatically sends the initial sign-in credentials to this e-mail when you save the record.

   You can leave the Hire Date as is.

4. In the User Details region, enter the user name. If you leave the User Name field blank, then the application creates a user name based on the entries you have already made.

5. In the User Notification region, select the Send User Name and Password option so setup users receive initial e-mail notifications with their login and password details when you save the record.

6. In the Employment Information region, enter the information shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person Type</td>
<td>Select Employee.</td>
</tr>
<tr>
<td>Legal Employer</td>
<td>Select the legal employer Oracle created for you using the information you provided when you signed up with Oracle Incentive Compensation.</td>
</tr>
<tr>
<td>Business Unit</td>
<td>Select the business unit created for you using the information you provided when you signed up with Oracle Incentive Compensation.</td>
</tr>
</tbody>
</table>
7. Click **Autopropvision Roles**.

The Roles region displays the roles for the Setup Administrator job:

- Application Implementation Consultant
- IT Security Manager
- Application Diagnostics Administrator

8. Click **Save and Close**.

An e-mail is sent to the new setup user containing the initial credentials for signing in the application.
5 Configuring Your Enterprise Structures

Setup Tasks Completed for You in Oracle Sales Cloud

Oracle sets up the application with some basic information about your company, information that you provided when you signed up for Oracle Sales Cloud. You can verify the values using the tasks provided in this topic. You can reach the tasks directly from the implementation project provided by Oracle, or by searching for the tasks in the Setup and Maintenance work area.

✍️ Note: If you are setting up Oracle Sales Cloud together with another cloud service such as Oracle Global Human Resources Cloud, Oracle Procurement Cloud, and Oracle Financials Cloud, then Oracle does not complete any of these tasks in your environment. In such shared Global Single Instance (GSI) environments, you must set up enterprise structures, such as legal entity and business unit, in the other cloud services according to the instructions provided in their respective implementation guides. All guides are available on docs.oracle.com.

The following table lists and describes the information entered for you.

<table>
<thead>
<tr>
<th>What Oracle Enters for You</th>
<th>Description</th>
<th>Setup Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your company name</td>
<td>Access this task to view the company name Oracle entered based on the information you provided.</td>
<td>Manage Enterprise HCM Information</td>
</tr>
<tr>
<td>Your corporate address and legal entity</td>
<td>The corporate address is the address that you provided. As a best practice, use the same legal corporate address used for tax information. The legal entity name Oracle enters for you is your enterprise name followed by the suffix LE. Because the legal entity is used in setup only and is not visible to Sales Cloud users, the name you use is unimportant. When you create a user who is an employee, you must specify the legal entity. In the Create User UI, the legal entity is called the Legal Employer.</td>
<td>Search Legal Entities</td>
</tr>
<tr>
<td>Creates a business unit and sets the business unit as the default.</td>
<td>Oracle creates one business unit for creating your employee users. The business unit name is your enterprise name followed by the suffix BU. Oracle then sets the profile option HZ_DEFAULT_BU_CRM to that business unit.</td>
<td>Manage Common CRM Business Unit Profile Options</td>
</tr>
</tbody>
</table>

In addition, Oracle creates one user for you. This is the initial user you received in the welcome e-mail. The initial user is provisioned with the following job roles:

- Application Implementation Consultant
• IT Security Manager
• Application Diagnostic Administrator

The initial user can create other users, change security settings, and perform many, but not all, implementation tasks. The user is not provisioned with all the security permissions required to complete the setups in this guide, but has the ability to assign these roles to herself and to others. For example, the initial user does not have the permission to set up search and run and monitor scheduled processes.

**Enterprise: Explained**

An enterprise is a collection of legal entities under common control and management.

**Enterprise Defined**

When implementing Oracle Fusion Applications you operate within the context of an enterprise that has already been created in the application for you. This is either a predefined enterprise or an enterprise that has been created in the application by a system administrator. An enterprise organization captures the name of the deploying enterprise and the location of the headquarters. In Oracle Fusion Applications, an organization classified as an enterprise is defined before defining any other organizations in the HCM Common Organization Model. All other organizations are defined as belonging to an enterprise.

**Managing Enterprise Information for Non-HCM Users: Explained**

The Manage Enterprise HCM Information task includes default settings for your enterprise such as the employment model, worker number generation, and so on. If you are not implementing Oracle Fusion Human Capital Management (HCM), then the only action you may need to perform using this task is to change the enterprise name, if necessary. The other settings are HCM-specific and are not relevant outside of Oracle Fusion HCM.

**Enterprise Structures Business Process Model: Explained**

In Oracle Fusion Applications, the Enterprise Performance and Planning Business Process Model illustrates the major implementation tasks that you perform to create your enterprise structures. This process includes:

- Set Up Enterprise Structures business process, which consists of implementation activities that span many product families.
- Information Technology, a second Business Process Model which contains the Set Up Information Technology Management business process.
- Define Reference Data Sharing, which is one of the activities in this business process and is important in the implementation of the enterprise structures. This activity creates the mechanism to share reference data sets across multiple ledgers, business units, and warehouses, reducing the administrative burden and decreasing the time to implement.
The following figure and chart describes the Business Process Model structures and activities.

**Business Process Model (BPM)**

**Activities**
- Define Enterprise
- Define Enterprise Structures
- Define Legal Jurisdictions and Authorities
- Define Legal Entities
- Define Business Units
- Define Financial Reporting Structures
- Define Chart of Accounts
- Define Ledgers
- Define Accounting Configurations
- Define Facilities
- Define Reference Data Sharing

**BPM Activities** | **Description**
--- | ---
Define Enterprise | Define the enterprise to get the name of the deploying enterprise and the location of the headquarters.
Define Enterprise Structures | Define enterprise structures to represent an organization with one or more legal entities under common control. Define organizations to represent each area of business within the enterprise.
### BPM Activities

<table>
<thead>
<tr>
<th>BPM Activities</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Legal Jurisdictions and Authorities</td>
<td>Define information for governing bodies that operate within a jurisdiction.</td>
</tr>
<tr>
<td>Define Legal Entities</td>
<td>Define legal entities and legal reporting units for business activities handled by the Oracle Fusion Applications.</td>
</tr>
<tr>
<td>Define Business Units</td>
<td>Define business units of an enterprise to perform one or many business functions that can be rolled up in a management hierarchy. A business unit can process transactions on behalf of many legal entities. Normally, it has a manager, strategic objectives, a level of autonomy, and responsibility for its profit and loss.</td>
</tr>
<tr>
<td>Define Financial Reporting Structures</td>
<td>Define financial reporting structures, including organization structures, charts of accounts, organizational hierarchies, calendars, currencies and rates, ledgers, and document sequences which are used in organizing the financial data of a company.</td>
</tr>
<tr>
<td>Define Chart of Accounts</td>
<td>Define chart of accounts including hierarchies and values to enable tracking of financial transactions and reporting at legal entity, cost center, account, and other segment levels.</td>
</tr>
<tr>
<td>Define Ledgers</td>
<td>Define the primary accounting ledger and any secondary ledgers that provide an alternative accounting representation of the financial data.</td>
</tr>
<tr>
<td>Define Accounting Configurations</td>
<td>Define the accounting configuration that serves as a framework for how financial records are maintained for an organization.</td>
</tr>
<tr>
<td>Define Facilities</td>
<td>Define your manufacturing and storage facilities as Inventory Organizations if Oracle Fusion tracks inventory balances there and Item Organizations if Oracle Fusion only tracks the items used in the facility but not the balances.</td>
</tr>
<tr>
<td>Define Reference Data Sharing</td>
<td>Define how reference data in the applications is partitioned and shared.</td>
</tr>
</tbody>
</table>

**Note:** Some product-specific implementation activities are not listed here and depend on the applications you are implementing. For example, you can implement Define Enterprise Structures for Human Capital Management, Project Management, and Sales Management.

### Locations: Explained

A location identifies physical addresses of a workforce structure, such as a department or a job. You create and manage locations using the Manage Locations task in the Workforce Structures work area.

You can also create locations to enter the addresses of external organizations that you want to maintain, such as employment agencies, tax authorities, and insurance or benefits carriers.

The locations that you create exist as separate structures that you can use for reporting purposes, and in rules that determine employee eligibility for various types of compensation and benefits. You enter information about a location only once. Subsequently, when you set up other workforce structures you select the location from a list.
Location Sets

When you create a location, you must associate it with a set. Only those users who have access to the set’s business unit can access the location set and other associated workforce structure sets, such as those that contain departments and jobs.

Note the following:

- You can also associate the location to the common set so that users across your enterprise can access the location irrespective of their business unit.
- When users search for locations, they can see the locations that they have access to along with the locations in the common set.

The following figure shows how locations sets restrict access to users.

Uploading Locations Using a Spreadsheet

If you have a list of locations already defined for your enterprise, you can upload them from a spreadsheet.

To use this option:

- Download a spreadsheet template
- Add your location information to the spreadsheet
- Upload directly to your enterprise configuration

You can upload the spreadsheet multiple times to accommodate revisions.
Related Topics

• Why can’t I see my location in the search results?
• What happens if I inactivate a location?
• Uploading Workforce Structures Using a Spreadsheet: Explained

How Incentive Compensation Uses Locations

Locations associated with a person in Manage Users are used for the My Team’s Compensation map icon and territory graphic. The territory graphic for the map works for only the United States.

Business Units: Explained

A business unit is a unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy. A business unit can process transactions on behalf of many legal entities. Normally, it has a manager, strategic objectives, a level of autonomy, and responsibility for its profit and loss. Roll business units up into divisions if you structure your chart of accounts with this type of hierarchy.

In Oracle Fusion Applications you do the following:

• Assign your business units to one primary ledger. For example, if a business unit is processing payables invoices, then it must post to a particular ledger. This assignment is required for your business units with business functions that produce financial transactions.
• Use a business unit as a securing mechanism for transactions. For example, if you run your export business separately from your domestic sales business, then secure the export business data to prevent access by the domestic sales employees. To accomplish this security, set up the export business and domestic sales business as two separate business units.

The Oracle Fusion Applications business unit model provides the following advantages:

• Enables flexible implementation
• Provides consistent entity that controls and reports on transactions
• Shares sets of reference data across applications

Business units process transactions using reference data sets that reflect your business rules and policies and can differ from country to country. With Oracle Fusion Application functionality, you can share reference data, such as payment terms and transaction types, across business units, or you can have each business unit manage its own set depending on the level at which you want to enforce common policies.

In countries where gapless and chronological sequencing of documents is required for subledger transactions, define your business units in alignment with your legal entities to ensure the uniqueness of sequencing.

In summary, use business units for:

• Management reporting
• Transaction processing
- Transactional data security
- Reference data sharing and definition

**Brief Overview of Business Unit Security**

A number of Oracle Fusion Applications use business units to implement data security. You assign roles like Accounts Payable Manager to users to permit them to perform specific functions, and you assign business units for each role to users to give them access to data in those business units. For example, users which have been assigned a Payables role for a particular business unit, can perform the function of payables invoicing on the data in that business unit. Roles can be assigned to users manually using the Security Console, or automatically using provisioning rules. Business Units can be assigned to users using the Manage Data Access for Users task in Setup and Maintenance.

**Related Topics**
- Reference Data Sets and Sharing Methods: Explained

**Business Functions: Explained**

A business unit can perform many business functions in Oracle Fusion Applications.

**Business Functions**

A business function represents a business process, or an activity that can be performed by people working within a business unit and describes how a business unit is used. The following business functions exist in Oracle Fusion applications:

- Billing and revenue management
- Collections management
- Customer contract management
- Customer payments
- Expense management
- Incentive compensation
- Marketing
- Materials management
- Inventory management
- Order fulfillment orchestration
- Payables invoicing
- Payables payments
- Procurement
- Procurement contract management
- Project accounting
- Receiving
- Requisitioning
• Sales

Although there is no relationship implemented in Oracle Fusion Applications, a business function logically indicates a presence of a department in the business unit with people performing tasks associated with these business functions. A business unit can have many departments performing various business functions. Optionally, you can define a hierarchy of divisions, business units, and departments as a tree over HCM organization units to represent your enterprise structure.

Note: This hierarchy definition is not required in the setup of your applications, but is a recommended best practice.

Your enterprise procedures can require a manager of a business unit to have responsibility for their profit and loss statement. In such cases, any segment that allows the identification of associated revenue and costs can be used as a profit center identification. The segment can be qualified as a cost center segment.

However, there are cases where a business unit is performing only general and administrative functions, in which case your manager’s financial goals are limited to cost containment or recovering of service costs. For example, if a shared service center at the corporate office provides services for more commercially-oriented business units, it does not show a profit and therefore, only tracks its costs.

In other cases, where your managers have a responsibility for the assets of the business unit, a balance sheet can be produced. The recommended best practice to produce a balance sheet is to setup the business unit as a balancing segment in the chart of accounts. The business unit balancing segment can roll up to divisions or other entities to represent your enterprise structure.

When a business function produces financial transactions, a business unit must be assigned to a primary ledger, and a default legal entity. Each business unit can post transactions to a single primary ledger, but it can process transactions for many legal entities.

The following business functions generate financial transactions and will require a primary ledger and a default legal entity:

• Billing and revenue management
• Collections management
• Customer payments
• Expense management
• Materials management
• Payables invoicing
• Project accounting
• Receiving
• Requisitioning

Business Unit Hierarchy: Example

For example, your InFusion America Company provides:

• Air quality monitoring systems through your division InFusion Air Systems
• Customer financing through your division InFusion Financial Services

The InFusion Air Systems division further segments your business into the System Components and Installation Services subdivisions. Your subdivisions are divided by business units:

• System Components by products: Air Compressors and Air Transmission
Oracle Fusion applications facilitates independent balance sheet rollups for legal and management reporting by offering up to three balancing segments. Hierarchies created using the management segment can provide the divisional results. For example, it is possible to define management segment values to correspond to business units, and arrange them in a hierarchy where the higher nodes correspond to divisions and subdivisions, as in the Infusion US Division example above.

**Setting Up Incentive Compensation Business Units: Points to Consider**

There are many factors that impact how you set up your incentive compensation business units for your global enterprise structure. These factors, include incentive compensation plans, data security, processing, and reporting.

**Incentive Compensation Plans**

Plan factors that impact how to best configure your business units include commonality across the organizational hierarchy as well as quantity and complexity of plans.

**Examples:**

- At which level do you use common incentive compensation plans: country, division, region, or global?
• Do your compensation plans use common components, expressions, and performance measures at the country, division, region or global level or is each plan independent?
• How many different compensation plans do you use per business unit?
• How complex are your compensation plans?
• Are your plans similar enough that you could use personalization of incentive plan data to handle the minor variations?

You can individualize many compensation plan values for participants, which can reduce the number of plans that you actually have to create and manage. Level of complexity also affects the quantity of plans you create, and in which business units it would be most efficient to create and maintain them.

### Data Security, Processing, and Reporting

Be sure to consider how you want to constrain data access and visibility as well as incentive processing.

Examples:

• At what level do you want to secure data: by line of business, division, country, or globally?
• Is your processing centralized, or do individual business units or regional centers perform the analyst function? Do they only work on their participants or is work pooled?
• How do you want to report on your business units and divisions?

You can process transactions across business units and teams. Set a global operating currency and process incentive compensation in local currencies or using a global currency. You can introduce global sales teams and structures at any time, without changing your enterprise structure model.

**Related Topics**

• Direct and Rollup Credit Transactions: How They Are Created

### Incentive Compensation Business Units by Division and Zones: Example

This example uses a fictitious global company to demonstrate business unit analysis as part of enterprise structure planning. In this scenario, you are chairing a committee to create a model for your global enterprise structure.

### Enterprise Structure

You work for a multinational conglomerate that operates in 15 countries worldwide. You plan to use Incentive Compensation as a standalone application.

You have three processing centers (Asia-Pacific, Americas, and Europe-Middle East) and two divisions:

• High-tech Products has 10 very complex compensation plans that are used globally. It creates all plans and administers quota worldwide in USD.
Consumer Services has over 100 similar simple, but slightly variant locally-used compensation plans. It creates compensation plans with rate tiers and quotas in USD or EUR and pays all participants in their local currency. There is no overlap of plans between the divisions. All employees report to in-region managers, there are no cross-region teams.

You want to segregate data for security purposes by division. Compensation analysts in different regional centers work on a 24 x 7 basis on paysheets for any participant worldwide in their assigned division. Both divisions and all business units use USD as the operating currency so that executives can easily review all performance and expenses.

Analysis

The following are elements to consider when creating the business units for your global enterprise structure.

- At which level do you use common incentive compensation plans: country, division, region, or global?
- Do your compensation plans use common components, expressions, and performance measures at the country, division, region or global level or is each plan independent?
- How many different compensation plans do you use per business unit? How complex are they?
- Are your plans similar enough that you could use personalization of incentive plan data to handle the minor variations?
- At what level do you want to secure data: by line of business, division, country, or globally?
- Is your processing centralized, or do individual business units or regional centers perform the analyst function? Do they only work on their participants or is work pooled?
- How do you want to report on your business units and divisions?

Global Enterprise Structure Model

Because Oracle Fusion Incentive Compensation accommodates multicurrency processing and reporting, your committee recommends creating three separate business units.

- Set up one business unit to handle the 10 complex global compensation plans for the High-Tech Products division in one place.
- Set up the other two business units to handle the two zones (USD and EUR) for the Consumer Services division, with operating currency set to USD and EUR, respectively. This enables you to reduce the 100 differing plans to 5 global plans with personalized weights, quotas, and rates.

The implementation of three business units:

- Meets the currency processing requirements
- Provides consistent enforcement of company policies
- Improves efficiency across the organization

Related Topics

- When do I include incentive compensation business units in, or exclude them from, the credit and rollup hierarchy?
Incentive Compensation Business Units by Region: Example

This example uses a fictitious global company to demonstrate business unit analysis as part of enterprise structure planning. In this scenario, you are chairing a committee to create a model for your global enterprise structure.

Enterprise Structure

You work for a multinational conglomerate that operates in 15 countries worldwide. You plan to use Incentive Compensation as a standalone application.

You have three processing centers (Asia-Pacific, Americas, and Europe-Middle East) and two divisions:

- Agricultural Products has three medium-complex compensation plans that are used globally.
- Consumer Products has over 50 simple plans, half of which are used globally and half regionally.

There is no overlap of plans between the divisions. You use local currency to create incentive compensation plan rate tiers and quotas, as well as to pay participants.

Employees may report to managers in different regions, who receive rollup credit. Also, employees in the Agricultural Products division may belong to sales teams with members from other regions.

You want to segregate data for security purposes by region; local analysts can work on compensation for either division, but only for participants in one region. Both divisions and all business units use local currency as the operating currency, so that executives can easily review all performance and expenses at the national level, across divisions and participants.

Analysis

The following are elements to consider when creating the business units for your global enterprise structure.

- At which level do you use common incentive compensation plans: country, division, region, or global?
- Do your compensation plans use common components, expressions, and performance measures at the country, division, region or global level or is each plan independent?
- How many different compensation plans do you use per business unit? How complex are they?
- Are your plans similar enough that you could use personalization of incentive plan data to handle the minor variations?
- At what level do you want to secure data: by line of business, division, country, or globally?
- Is your processing centralized, or do individual business units or regional centers perform the analyst function? Do they only work on their participants or is work pooled?
- How do you want to report on your business units and divisions?
Global Enterprise Structure Model

Because Oracle Fusion Incentive Compensation accommodates cross-region rollups and teams, your committee recommends creating three separate business units.

- Set up the three business units to correspond to the three processing center regions, combining operations for the Agricultural Products and Consumer Products divisions.
- For all business units, set the transaction currency to Participant home currency.
- Create and manage the three global plans for the Agricultural Products division and 25 global plans for the Consumer Products division in each of the three regional business units, as they are not too complex.

The implementation of three business units:

- Meets the currency processing requirements
- Provides consistent enforcement of company policies
- Improves efficiency across the organization

Related Topics

- What happens if I roll up incentive compensation credit to a parent?
6 Employee Configuration

Jobs and Positions: Critical Choices

Jobs and positions represent roles that enable you to distinguish between tasks and the individuals who perform those tasks.

Note the following:

- The key to using jobs or positions depends on how each is used.
- Positions offer a well-defined space independent of the person performing the job.
- Jobs are a space defined by the person.
- A job can be defined globally in the Common Set, whereas a position is defined within one business unit.
- You can update the job and department of a position at any time. For example, if you hire someone into a new role and want to transfer the position to another department.

During implementation, one of the earliest decisions is whether to use jobs or a combination of jobs and positions. The determinants for this decision are:

- The primary industry of your enterprise
- How you manage your people

Primary Industry of Your Enterprise

The following table outlines information about Primary industries and how they set up their workforce.

<table>
<thead>
<tr>
<th>Primary Industry</th>
<th>Workforce Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>Positions</td>
</tr>
<tr>
<td>Utilities</td>
<td>Positions</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Positions</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>Positions</td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>Positions</td>
</tr>
<tr>
<td>Educational Services</td>
<td>Positions</td>
</tr>
<tr>
<td>Public Transportation</td>
<td>Positions</td>
</tr>
<tr>
<td>Agriculture, Forestry, Fishing, and Hunting</td>
<td>Jobs</td>
</tr>
<tr>
<td>Construction</td>
<td>Jobs</td>
</tr>
<tr>
<td>Primary Industry</td>
<td>Workforce Setup</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>Jobs</td>
</tr>
<tr>
<td>Information</td>
<td>Jobs</td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td>Jobs</td>
</tr>
<tr>
<td>Professional, Scientific, and Technical Services</td>
<td>Jobs</td>
</tr>
<tr>
<td>Management of Companies and Enterprises</td>
<td>Jobs</td>
</tr>
<tr>
<td>Administrative and Support and Waste Management and Remediation Services</td>
<td>Jobs</td>
</tr>
<tr>
<td>Arts, Entertainment, and Recreation</td>
<td>Jobs</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>Jobs</td>
</tr>
<tr>
<td>Other Services (Except Public Administration)</td>
<td>Jobs</td>
</tr>
</tbody>
</table>

Management of People

The following table displays suggestions of whether to use jobs or a combination of jobs and positions based on your industry and how you manage your employee turnover.

<table>
<thead>
<tr>
<th>Industry</th>
<th>You always replace employees by rehiring to same role</th>
<th>You replace the headcount, but the manager can use the headcount in a different job</th>
<th>You rehire to the same position, but the manager can request a reallocation of budget to a different post</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project (An industry that supports project-based forms of organization in which teams of specialists from both inside and outside the company report to project managers.)</td>
<td>Positions</td>
<td>Jobs</td>
<td>Jobs</td>
</tr>
<tr>
<td>Controlled (An industry that is highly structured in which all aspects of work and remuneration are well organized and regulated.)</td>
<td>Positions</td>
<td>Positions</td>
<td>Positions</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>Positions</td>
<td>Jobs</td>
<td>Positions</td>
</tr>
<tr>
<td>Retail</td>
<td>Positions</td>
<td>Jobs</td>
<td>Positions</td>
</tr>
</tbody>
</table>
Industry | You always replace employees by rehiring to same role | You replace the headcount, but the manager can use the headcount in a different job | You rehire to the same position, but the manager can request a reallocation of budget to a different post
--- | --- | --- | ---
Education | Positions | Jobs | Positions
Other | Positions | Jobs | Jobs

Related Topics
- Grades and Grade Rates: How They Work with Jobs, Positions, Assignments, Compensation, and Payroll

Positions: Examples

Positions are typically used by industries that use detailed approval rules, which perform detailed budgeting and maintain headcounts, or have high turnover rates.

Retail Industry

ABC Corporation has high turnovers. It loses approximately 5% of its cashiers monthly. The job of the cashier includes three positions: front line cashier, service desk cashier, and layaway cashier. Each job is cross-trained to take over another cashier’s position. When one cashier leaves from any of the positions, another existing cashier from the front line, service desk or layaway can assist where needed. But to ensure short lines and customer satisfaction, ABC Corporation must replace each cashier lost to turnover. Since turnover is high in retail it’s better for this industry to use positions.

Note the following:

- An automatic vacancy is created when an employee terminates employment.
- The position exists even when there are no holders. Having the position continue to exist is important if the person who leaves the company is a manager or supervisor with direct reports.
- All direct reports continue reporting to the position even if the position is empty.
- You don’t have to reassign these employees to another manager or supervisor. The replacement manager is assigned to the existing position.

Also, an added advantage to using Positions is when you hire somebody new, many of the attributes are inherited from the position. This speeds up the hiring process.
This figure illustrates the retail position setup.

Health Care Industry

Health care is an industry that must regulate employment, roles, and compensation according to strict policies and procedures. Fixed roles tend to endure over time, surviving multiple incumbents. Industries that manage roles rather than individuals, where roles continue to exist after individuals leave, typically model the workforce using positions.

The hospital has a structured headcount and detailed budgeting. For example, a specific number of surgeons, nurses, and interns of various types are needed. These positions must be filled in order for the hospital to run smoothly. Use jobs and positions when you apply detailed headcount rules.
This figure illustrates the hospital position setup.

Jobs: Example

Jobs are typically used without positions by service industries where flexibility and organizational change are key features.

Software Industry

For example, XYZ Corporation has a director over the departments for developers, quality assurance, and technical writers.

- Recently, three developers have left the company.
- The director decides to redirect the head count to other areas.
- Instead of hiring all three back into development, one person is hired to each department, quality assurance, and technical writing.

In software industries, the organization is fluid. Using jobs gives an enterprise the flexibility to determine where to use head count, because the job only exists through the person performing it. In this example, when the three developers leave XYZ Corporation, their jobs no longer exist, therefore the corporation has the flexibility to move the headcount to other areas.
This figure illustrates the software industry job setup.

[Diagram of job titles within XYZ Corporation's Technology Department: Developer, Quality Assurance Specialist, Technical Writer]
7 Managing Calendars and Intervals

Managing Incentive Compensation Calendars: Procedure

You must associate an incentive compensation calendar with each business unit before you can process transactions for the business unit.

The basic process for managing calendars is:

1. Creating the calendar
2. Assigning the calendar to a business unit
3. Editing the status of periods within the business unit
4. Creating periods in the calendar

Creating the Calendar

To create calendars:

1. Navigate to the Manage Calendars task in the Setup and Maintenance work area.
2. Select the period type, which specifies how you divide your calendar or fiscal year.

Create custom period types as required.

- Enter the number of periods in a year so that the application can validate the periods that you define for the calendar.
- Select the shortest required period (for example, weekly or monthly) to ensure that the application can accumulate attainments, maintain goals and subledger balances, and process payments at this level, or any higher level. You can’t accumulate attainments for a period type shorter than your selection. For example: If you select Monthly, then you can’t accumulate attainments weekly.

**Note:** You can’t edit or delete standard or custom period types used by any calendar.

3. Define the periods by using the selected period type, including:

   - Period, such as Jan-2015 or Quarter1-2015
     
     Abbreviate the period name if you want to, for example, Jan for January or W1 for Week1.
   - Sequence
     
     The application arranges periods based on the sequence values that you enter.
   - Start and end dates
     
     The date ranges within one period cannot overlap with other periods and must be continuous with reference to the previous and next periods.

Create all of the periods required for the compensation plans, measures, and goals before creating the plans, measures, and goals.

4. Save the calendar.
The Save process stores the calendar data in the calendar table CN_CALENDARS and the period data in the period table CN_PERIODS.

Assigning a Calendar to a Business Unit

To assign a calendar to a business unit:

1. In the Setup and Maintenance work area, search for and go to the Manage Parameters task.
   You must select the business unit to set the context for this task.
2. Select the calendar that you want to use for the business unit.
3. Save your edits.

   The Save process inserts the periods (zero or more) that are assigned to that calendar into the following business-unit-level tables:

   - The CN_CAL_PER_INTTYPES table stores each period for each interval type defined for the business unit.
   - The CN_PERIOD_STATUS table stores basic period data, including the default status, Never Opened, which is given to each period.

Editing the Period Status Within the Business Unit

To edit the period status within the business unit:

1. Edit the Period Status in the Manage Periods page. Open this page using either of these tasks:
   - Manage Periods in the Participant Assignments work area
   - Manage Open Period Process in the Setup and Maintenance work area
2. Specify whether to include period data in participant reports.
3. Save your edits.

   The Save process updates the period statuses in the CN_PERIOD_STATUS table accordingly. If required, it starts a scheduled process to populate the period data in all of the participant-related (SRP) tables.

Creating Calendar Periods

To create calendar periods:

1. Navigate to the Manage Calendars task in the Setup and Maintenance work area.
2. Select the calendar.
3. Add future periods to the calendar.
4. Save your edits.

   The Save process inserts the new period records into the following tables:

   - CN_PERIODS: Tracks the nonbusiness-unit-based calendar period
   - CN_PERIOD_STATUS: Tracks the periods and associated statuses for each business unit
     Example: If there are three business units associated with the calendar, then insert the newly created period record into all of the business unit tables.
   - CN_CAL_PER_INTTYPES: Groups each period into the interval type for each business unit.
Example: If there are three business units associated with a calendar, and assuming each one has four interval types (Period, Quarter, Semi-Annual, and Year), then insert the newly created period record as 12 records (3 business units x 4 interval types).

Adding a New Fiscal Year
To add periods for a new fiscal year to a calendar in use by business units:

1. Create all the periods required for performance measures and goals first using the Manage Calendars task in the Setup and Maintenance work area.
2. Use the Manage Periods task in the Participant Assignments work area or the Manage Open Period Process task in the Setup and Maintenance work area to:
   - Correct the interval numbers for the new period under various interval types for the business unit.
   - Open the period in each business unit to use the period for transaction processing.

The Save process on the Manage Calendar page updates the period status and interval-related tables for all of the business units to which you assigned the calendar.

Related Topics
- What happens if I assign a calendar to an incentive compensation business unit?
- Setting Incentive Compensation Period Status: Explained

Can I use the same incentive compensation calendar for different business units?
Yes. Use the Manage Parameters task in the Setup and Maintenance work area to assign the calendar. You must select a business unit to set context when using this task.

The application automatically propagates any change to the calendar, such as new periods, to all of the business units using the calendar.

Related Topics
- What happens if I assign a calendar to an incentive compensation business unit?
8 Multiple Currencies

Importing Currency Conversion Rates for Incentive Compensation: Procedure

You can manually import currency conversion rates into Oracle Sales Cloud Incentive Compensation using the template linked from the File Based Data Import Guide for Oracle Sales Cloud. The basic process for importing currency conversion rates is:

1. Populate the import file.
2. Import the currency conversion rates.
3. Review the import results.

Prerequisites

Using the Manage Parameters task in the Setup and Maintenance work area, set the following parameters to meet your currency conversion requirements:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Conversion Rate Type</td>
<td>Converts base transaction currencies during crediting, rollup and calculation processing</td>
</tr>
<tr>
<td>Collection Conversion Rate Type</td>
<td>Converts transaction amounts from one currency to another during collection</td>
</tr>
<tr>
<td>Payment Conversion Rate Type</td>
<td>Converts the payment transactions from one currency to another</td>
</tr>
</tbody>
</table>

Use the Manage Currency Conversions task in the Setup and Maintenance work area to create any custom rate types included in your import workbook.

Populating the Import File

To populate the import files:

1. In the File Based Data Import Guide for Oracle Sales Cloud, search for the ICCurrencyConversionRateImportTemplate.xlsm file and save it locally.
2. Enter the currency conversion rates using the instructions and help included in the import file.
   - The import process uses the default value Incentive Compensation Daily Rate for any empty Conversion Rate Type cell.
3. Upload the file using the instructions in the first tab of the file.

⚠️ Caution: The Import Currency Conversion Rates process fails if you reorder or remove columns in your import file.
Importing the Currency Conversion Rates

Use the Import Currency Conversion Rates task in the Credits and Earnings work area to import the currency conversion rates. The Run All Transaction Processes task includes the Import Currency Conversion Rates process. Run All Transaction Processes imports any files uploaded to the `ic/incentiveCompensationCurrencyExchangeRates/import` WebCenter folder.

Reviewing the Import Results

Use the View Process Logs task to search for and view your import results. Click the audit ID for the relevant process to open the Process Details page, which provides the log details for the parent and any related child processes. The details include the number of processed currency conversion rate records, which you can compare with the number of records in the source XLSM file. You can also use the Manage Currency Conversions task in the Setup and Maintenance work area to confirm that the rates match those of the source XLSM file.

Related Topics

- File Based Data Import Guide for Oracle Sales Cloud
9 Incentive Compensation Configuration Within a Business Unit

Business Objects Marked as Scope Parameters: How They are Exported

When creating a configuration package for an implementation project, you may see some business objects listed and used as scope parameters. These correspond to business objects used as parameters just for the purpose of filtering setup data for some tasks within the implementation project used as source for the configuration package.

Note: Business objects that are used as scope parameters for data filtering do not appear when creating a configuration package for an offering or functional area.

How Export Handles Scope Parameters

The data for business objects used as scope parameters is not exported because these business objects are not directly associated to any tasks in the implementation project used to create the configuration package. During export, all scope values defined by user are passed to each service to filter the appropriate data. Each service uses the applicable parameters and return the appropriate setup data. Therefore data of the business objects that depend on the business object scope parameter is filtered and exported.

Example

Receivable data may be filtered by subledger, (subledger may have been defined as the scope parameter for receivable data). Even if subledger is not associated with any tasks in the Receivables configuration you selected to export, you have the option to filter receivables data associated to certain subledgers during export. You find the subledger business object listed as scope parameter even though subledger data does not exported.

Manage Parameters

Incentive Compensation Currency Parameters: Critical Choices

When you define the incentive compensation configuration for a business unit, you set the operating and processing currencies. You also specify transaction and payment conversion rate types. Use the Manage Parameters task in the Setup and Maintenance work area.

Note: After you save operating and processing currency parameter settings for the business unit, you can’t change them.
Operating Currency

Operating currency is the core, default currency for a given business unit. To report across incentive compensation business units, you must set the operating currency for all business units to the same currency. For example: Your North America business unit uses USD as its operating currency while your EMEA business unit uses EUR. Generally, the application uses operating currency for these purposes:

- To report across various transactions within a business unit
  
  Examples: Cost of compensation across all incentive compensation plans and total incentive payments for the period of January

- For all amount values in compensation plans in the Compensation Plans work area

Processing Currency

Processing currency is the core currency for credit, earnings, and payment transaction amounts. The application maintains participant subledger balances only in the processing currency. A participant might have subledger balances in more than one currency if you set the processing currency as Participant home currency, and the participant’s home currency changes.

If you select Participant home currency, then you must individualize all compensation plan amount values for each participant that you pay in a currency other than the business unit operating currency. Amounts that must be individualized include:

- Target incentive
- Goals
- Rates
- Credit and transaction factors
- Performance measure weights

Multicurrency Support

To support multicurrency processing, incentive processes use the source transaction amount and event date to populate all transactions with appropriate values for each relevant:

- Currency
- Conversion rate
- Amount attribute

The following table shows the currencies in which the application stores base, credit, earnings, and payment transaction amounts.

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Source Currency</th>
<th>Processing Currency</th>
<th>Operating Currency</th>
<th>Participant Home Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Credit</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Earnings</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Processing currency is the core currency for credit, earnings, and payment transaction amounts. Other currencies are available for transaction traceability and reporting. For example: When you adjust the amount of a base transaction, that adjustment is shown in the source currency while credit and earning amounts are shown in the processing currency.

**Conversion Rate Types**

When processing currency is Participant home currency, you must also select which rate to use to convert amounts during processing. Create rate types such as Corporate, Daily, and Period Average, and define rates differently under each one of them to use in different scenarios. For example: You decide to use Daily rates to convert transaction and credit amounts, and Period Average rates to convert payment amounts. The following table describes the purpose of each conversion rate type parameter.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Conversion Rate Type</td>
<td>Converts base transaction amounts during crediting, rollup and calculation processing</td>
</tr>
<tr>
<td>Collection Conversion Rate Type</td>
<td>Converts transaction amounts during collection processing</td>
</tr>
<tr>
<td>Payment Conversion Rate Type</td>
<td>Converts payment transaction amounts during payment processing</td>
</tr>
<tr>
<td></td>
<td>The Payment Conversion Date parameter determines whether the payment process uses the transaction date or the payment batch pay date to look up the corresponding currency rate to use.</td>
</tr>
</tbody>
</table>

**Related Topics**

- Incentive Compensation Transaction Processing: Overview

**Crediting and Rollup Parameters: Critical Choices**

Parameters that you set using the Manage Parameters task in the Setup and Maintenance work area affect if and when crediting and rollup processes run. These parameters are application-level parameters that you set up as part of your implementation.

These selections also determine which credit rule hierarchy to use and whether to aggregate transactions during rollup. You create and manage the rule hierarchies and rules in the Participant Assignments work area.

**Direct or Rollup Crediting Enablement**

You can specify whether to enable both direct and rollup crediting or only one of the two processes. The following table describes processing expectations and actions when you elect only one process.

<table>
<thead>
<tr>
<th>Enabled Process</th>
<th>Processing Expectations and Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Crediting only</td>
<td>Set up your credit rules to generate direct, indirect, and rollup credit transactions on transactions that match the rule qualifying criteria.</td>
</tr>
</tbody>
</table>
Enabled Process | Processing Expectations and Actions
--- | ---
Rollup Crediting only | You must include credit receiver, credit amount, and credit split data on the transactions. The collection process then validates these transactions and loads them as credit transactions. The rollup process runs using the collected credit transactions.
Include direct credit receivers in the rollup hierarchy, on the lowest level rules.

If you elect to override the crediting and rollup processes, collected transactions must include the credit receiver, credit amount, split percentage, and revenue type.

You must:
- Provide the relevant process code on the source transaction
  For details about the valid process codes, see the Overriding Classification, Crediting, and Rollup Process Codes: Explained topic.
- Run the collection and crediting processes to ensure credit transactions are picked up for subsequent processing.

### Rollup Hierarchy to Use

If you enable rollup crediting, then you further specify:
- Which hierarchy to use to create the rollup credits
- Whether to aggregate transactions during rollup

The following table describes the hierarchies that you can use for rollup processing.

<table>
<thead>
<tr>
<th>Rollup Hierarchy Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit hierarchy</td>
<td>Discretely manage your rollup hierarchy within the credit hierarchy using the direct participants credit receivers associated with the direct credit rule. Participants in parent positions automatically receive all of the credit for direct credit receivers in descendant positions who have Roll Up to Parents selected on the direct credit rule.</td>
</tr>
<tr>
<td>Rollup hierarchy</td>
<td>Participants in parent positions automatically receive all of the credit for participants in descendant positions who report to them.</td>
</tr>
<tr>
<td>Both</td>
<td>Use both the credit and rollup hierarchies to determine rollup credit.</td>
</tr>
</tbody>
</table>

### Transaction Summarization

If you elect to summarize transactions during rollup, then you can also specify whether to base summarization on custom criteria.

If you elect to summarize transactions based on custom criteria, then substitute the default summary process with your own custom process. Modify one of the procedures listed in the following table, depending on your requirements and your selected rollup hierarchy.

<table>
<thead>
<tr>
<th>Selected Rollup Hierarchy</th>
<th>Procedure to Modify</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit hierarchy</td>
<td>CN_TP_CUSTOM_SUMMARIZE_CREDITS. summarizecredits with_rule</td>
</tr>
</tbody>
</table>
To customize a procedure:

1. Create your code.
2. Create a service request asking the Oracle Sales Cloud Incentive Compensation product development team to review the code.
3. Create a collaboration service request for the development team to update the package.
4. Enter your custom rollup procedure name in the Manage Parameters page.

Use Cases for Parameter Settings

The following table provides uses cases for when to enable direct crediting and rollup and which rollup hierarchy to use, where applicable.

<table>
<thead>
<tr>
<th>Use Case</th>
<th>Enable Direct Crediting</th>
<th>Enable Rollup Crediting</th>
<th>Rollup Hierarchy to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collect credit transactions from another source, such as accounts receivable.</td>
<td>No</td>
<td>Yes</td>
<td>Rollup hierarchy</td>
</tr>
<tr>
<td>Collect credit transactions from another source and also create credit transactions within incentive compensation</td>
<td>Yes</td>
<td>Yes</td>
<td>Credit hierarchy or Both</td>
</tr>
<tr>
<td>Create direct credit transactions using direct credit rules.</td>
<td>Yes</td>
<td>No</td>
<td>Not applicable</td>
</tr>
<tr>
<td>Create direct and indirect credits without using a reporting structure.</td>
<td>Yes</td>
<td>No</td>
<td>Not applicable</td>
</tr>
<tr>
<td>Collect credit transactions from another source. Within incentive compensation, create rollup and team credit transactions using the collected credit transactions.</td>
<td>No</td>
<td>Yes</td>
<td>Rollup hierarchy</td>
</tr>
<tr>
<td>Create credit transactions using incentive compensation direct and rollup credit rules.</td>
<td>Yes</td>
<td>Yes</td>
<td>Credit hierarchy</td>
</tr>
<tr>
<td>You have more control over which direct credit splits roll up the hierarchy using this option.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collect transactions that include credit receivers. Also create team credits where every team member receives the same attainment based on each</td>
<td>No</td>
<td>No</td>
<td>Not applicable</td>
</tr>
<tr>
<td>Use team credit rules as there is no parameter setting for teams.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use Case</td>
<td>Enable Direct Crediting</td>
<td>Enable Rollup Crediting</td>
<td>Rollup Hierarchy to Use</td>
</tr>
<tr>
<td>----------</td>
<td>------------------------</td>
<td>-------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>others' sales, without a reporting structure.</td>
<td>Yes</td>
<td>No</td>
<td>Not applicable</td>
</tr>
<tr>
<td>Create credit transactions using direct credit rules. Also create team credits where every team member receives the same attainment based on each others' sales, without a reporting structure.</td>
<td>Yes</td>
<td>Use team credit rules as there is no parameter setting for teams.</td>
<td></td>
</tr>
<tr>
<td>Create credit transactions using direct credit rules. Create rollup credit transactions using the credit hierarchy. Possibly create overlays using the rollup rule hierarchy. This setup is extremely rare and avoiding duplicate rollups is complex.</td>
<td>Yes</td>
<td>Yes</td>
<td>Both</td>
</tr>
</tbody>
</table>

**Related Topics**

- What happens if I edit an incentive compensation rollup credit receiver after processing?
- What happens if I edit an incentive compensation team or team member after processing?
- What happens if I roll up incentive compensation credit to a parent?
- Qualifying Criteria and Rule Hierarchy: How They Work Together

**Rollup Crediting Using the Credit Hierarchy: Points to Consider**

If you enable rollup crediting, then you can specify to use the credit hierarchy. You can discretely manage rollup crediting within the direct credit rule hierarchy using two credit receiver settings, Roll Up to Parents and Summarize Rollups.

Create and manage the direct credit rule hierarchy in the Participant Assignment work area. Use the Manage Parameters task in the Setup and Maintenance work area to:

- Enable rollup crediting and specify to use the credit hierarchy
- Enable aggregation of transactions during rollup

**Roll Up to Parents**

For each participant that you associate as a credit receiver, you specify whether to roll up all direct credits to reporting parents in the rule hierarchy.

**Summarize Rollups**

For each credit receiver where you select Roll Up to Parent, you also specify whether to summarize rollups. Summarizing rolled up transactions significantly reduces the number of transactions processed, improving performance substantially.
Note: Verify that your aggregated calculations create the same result as when the calculation process calculates direct and rollup, or indirect, credits separately. Some formulas can generate different amounts of compensation if you use summarized rollup transactions.

Scenario for Summarizing Rollups
This scenario is the foundation for answers to the questions asked in the next two sections. A credit hierarchy has five levels with five base participants, all of whom roll up to the same set of managers. If each of the five credit receivers has ten credit transactions, then the crediting process generates 50 credit transactions.

What Happens When I Don’t Summarize Rollups?
Result: After crediting and rollup there are 250 credit transactions—5 credit receivers x 10 credit transactions x 5 rollup levels. The crediting and rollup processes replicate base transactions to every resource in the rollup hierarchy.

What Happens When I Summarize Rollups?
Result: After rollup there are 25 summarized credit transactions (5 summarized credit transactions x 5 rollup levels) and 75 credit transactions instead of 250.

The rollup process:
1. Summarizes the credit transactions for each participant
2. Uses the five summary credits, one for each credit receiver, for rollup

Classification Parameters: Critical Choices
Settings on the Manage Parameters page of the Setup and Maintenance work area affect if and when the classification process runs. If you elect not to enable classification, then incentive processing assumes that the source transactions include credit categories.

Create and manage the classification rule hierarchy and rules in the Compensation Plans work area.

When to Run Classification
If you enable classification, then you further specify when to run the process, by selecting from these options:

- After crediting and rollup and before calculation

Use this option when:

- You import credit transactions and want to classify them
- Use only this option if the base transaction creates credit transactions in different business units. For example:
  - Example 1: A transaction is collected against BU1. The direct credit receiver (salesperson 1) is assigned from BU2.
  - Example 2: A transaction is collected against BU1 and the direct credit receiver (Salesperson 1) is also assigned from BU1. But Salesperson 1 rolls up to Manager 1, from another business unit, BU2.
  - The classification rules are different in each business unit.

Classifying after the crediting process runs gives you more flexibility in differentiating the credit category for the credit receiver’s transactions.
• After collection and before crediting

Tip: You may find it useful to include the identified category in your credit rules to help identify credit assignments.

The best practice is to preserve the value for when you run classification after you set it in a production application, as each process looks for specific status values on the data to determine what transactions to include. If you do change the parameter value, then run all related processes again for all of the currently open periods with transactions that are unprocessed or in process.

Incentive Payment Parameters: Points to Consider

Settings that you make using the Manage Parameters task in the Setup and Maintenance work area affect payment processing, including paysheet approvals and payment conversions. Also specify whether to reset subledger balances and the level of analyst security.

Approvals

If you do not require the payment approval process, then set Default Paysheet Approval Status to Approved. Approved is the final status before paying the payment batch. Enter values for these two amount parameters to specify an amount range that the payment process should automatically approve:

• Minimum Payment Automatic Approval Amount
• Maximum Payment Automatic Approval Amount

The provided payment approval process includes an exception rule that uses these values to send actionable notifications to compensation managers if a paysheet amount is less than or equal to the minimum amount and greater than or equal to the maximum amount. If these parameter amounts are not set, then the payment approval process:

• Does not automatically approve any of the paysheets
• Uses the regular approval process that is in place and continues the regular approval process activities for all paysheets

Conversions

Specify the rate type and date to use when converting payment amounts for participants with the processing currency set to Participant home currency.

Subledger Balances

Specify whether to reset participant balances at the start of each year.

Analyst Security

The Analyst Security setting controls which participants you can search for in the Select Participant tab of the Participant Snapshot work area. The setting also controls your search for a participant when you create a dispute. You can view all pay sheets for all participants in the summary page, but the security setting controls your access to paysheet details. Select one of the following for analyst security:

• If you select By participant, then the analyst can access data and tasks for only his or her assigned participants
Note: This parameter has no effect on the data that compensation managers can access.

- If you select **By business unit**, then all users with the Incentive Compensation Analyst job role can review and edit all participant data in the business units to which they have access.
- If you select **By Group**, then analysts can access and perform certain tasks not only for participants associated with them but also for participants associated with other analysts within the group. An analyst group forms when analysts and compensation managers are selected as administrators and share the same node of the analyst hierarchy.

**Related Topics**
- Paying Incentive Compensation Participants: Procedure
- Incentive Compensation Participant Subledger Balances: Explained

**How can I use different rates to process transactions and payments in different business units?**

In the Setup and Maintenance work area:

1. Use the Manage Currency Conversions task to define multiple currency rate types for the same date, different business units, or different usage.
2. Use the Manage Parameters task to select the rate type in the appropriate conversion rate type fields.

The rate types can match those in your general ledger, but don't have to.

**Example:**

- One business unit requires daily-based rates where the rate is different for each day.
- Another business unit requires period-based rates where the period is monthly and each period has the same rate. The rate might be the average or end rate for the period.
- Yet another business unit also requires period-based rates, but its period is weekly instead of monthly.

**Manage Intervals**

**Incentive Compensation Interval Types: Explained**

Interval types group specific calendar periods to accumulate achievements, such as interval-to-date attainment, earnings, such as year-to-date earnings, or payments during calculation and payment processing.

There are four delivered interval types:

- Year
- Semi-Annual
- Quarter
- Period
This interval type has the same definition as the calendar period.
You can create custom ones, as required.

Creating Quarterly Intervals Example
The following table shows how to use interval numbers to group periods into quarters.

<table>
<thead>
<tr>
<th>Period</th>
<th>Year</th>
<th>From Date</th>
<th>To Date</th>
<th>Interval Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan-15</td>
<td>2015</td>
<td>1-Jan-2015</td>
<td>31-Jan-2015</td>
<td>2015001</td>
</tr>
<tr>
<td>Feb-15</td>
<td>2015</td>
<td>1-Feb-2015</td>
<td>28-Feb-2015</td>
<td>2015001</td>
</tr>
<tr>
<td>Apr-15</td>
<td>2015</td>
<td>1-Apr-2015</td>
<td>30-Apr-2015</td>
<td>2015002</td>
</tr>
<tr>
<td>Sep-15</td>
<td>2015</td>
<td>1-Sep-2015</td>
<td>30-Sep-2015</td>
<td>2015003</td>
</tr>
</tbody>
</table>

Creating Yearly Intervals Example
The following table shows how to use an interval number to group periods into a year.

<table>
<thead>
<tr>
<th>Period</th>
<th>Year</th>
<th>From Date</th>
<th>To Date</th>
<th>Interval Number</th>
</tr>
</thead>
</table>
## Incentive Compensation Configuration Within a Business Unit

### Periods and Intervals

<table>
<thead>
<tr>
<th>Period</th>
<th>Year</th>
<th>From Date</th>
<th>To Date</th>
<th>Interval Number</th>
</tr>
</thead>
</table>

### Related Topics
- Managing Incentive Compensation Calendars: Procedure

### FAQs for Manage Intervals

**What happens if I edit interval numbers after using them in incentive compensation processing?**

You must run the calculation and payment processes again for all of the periods affected by the change in the interval numbers.

**Where are incentive compensation interval types used?**

They are used with:
- Performance measures as performance intervals to accumulate attainment information and as goal intervals
- Plan components to specify how frequently to calculate earnings—the payout frequency
- Payment plans as payment intervals to define draw and cap rules

You cannot delete a custom interval type if it’s used in any of these ways.

**Why can’t I delete an incentive compensation interval type?**

You can’t delete the delivered interval types Year, Semi-Annual, Quarter, and Period. Nor can you delete any custom interval type that you created if anyone used it in a performance measure, plan component, goal, or payment plan.
Configure Table and Columns

Enabling Table Columns as Attributes for Incentive Compensation Processing: Procedure

Enable table columns to use as attributes in incentive compensation processing, such as in calculation expressions and as classification and direct credit rule qualifying criteria.

Use the Configure Tables and Columns task in the Setup and Maintenance work area.

1. In the Tables section, select the table, such as CN_SRP_PARTICIPANTSDETAILS_ALL or CN_TRANSACTIONS_ALL.
2. In the Columns section row for the column that you want to enable:
   a. In the User Name field, enter a display name, such as Area Code for the column AREA_CODE.
      Each column that you enable for processing must have a corresponding user name, because the user name appears in the choice lists.
   b. Select the enable check box for the processes for which you want to use the column as an attribute, such as Enable for Classification.
      The processes for which you can enable the column attribute vary based on the selected incentive compensation table.
3. Click Save and Close.

Related Topics

- Incentive Compensation Expressions: Explained
- Managing Incentive Compensation Custom Qualifiers and Lookups: Procedure
10 Setting Up Oracle Social Network

About Setting Up Oracle Social Network

You must enable the Oracle Social Network for Oracle Sales Cloud objects, including opportunities and accounts, and specify which attributes you want to display on the wall. Oracle Social Network is a secure, private social network that integrates with Oracle Sales Cloud and connects you with all your colleagues. You can use Oracle Social Network to discuss projects, plans, and issues. Everyone can benefit from the collective experience and make better-informed business decisions.

You can enable the following Oracle Sales Cloud objects for Oracle Social Network:

- Account
- Contact
- Household
- Competitor
- Lead
- Opportunity
- Partner Account

Enabling an object displays the Social tab on the edit page. Salespersons can then share an individual account record on Oracle Social Network and invite others in the company to join the conversation.
When a record is shared, the application automatically generates a wall and displays the object attributes that you select during the setup. The following figure shows the wall for the ABC Corp. account with all the object attributes selected.

**Edit Account: ABC Corp. (San... : Conversations)**

Oracle Sales Cloud users with access to the account can join the conversation in the Social tab of the record and invite others.

All users who are part of the conversation, including those without access to the account record or to Oracle Sales Cloud, can access what’s posted on the wall either through the Social work area in the simplified UI or through the Oracle Social Network UI.
You can require salespersons to share records manually by clicking **Share** in the Social tab first.
Or, you can set up the application to create a wall for each record automatically. Oracle recommends that you set objects to be shared manually.
11 Setup and Maintenance Export and Import

Exporting and Importing Setup Data: Overview

Almost all Oracle Fusion application implementations require moving functional setup data from one instance into another at various points in the life cycle of the applications. For example, one of the typical cases in any enterprise application implementation is to first implement in a development or test application instance and then deploy to a production application instance after thorough testing. You can move functional setup configurations of applications from one application instance into another by exporting and importing setup data.

Setup data can be exported and imported for either:

- An entire offering or any of its functional areas. This option is recommended when you want to make sure all the setup data for an offering or functional area is migrated.
- An implementation project that contains a customized configuration or list of tasks. Use an implementation project as the source for exporting setup data when you require customizing the list of tasks or the list of objects you want to export setup data for.

In the case of an offering or functional area, setup data is exported only for the tasks relevant to the features that are enabled for implementation in such offering or functional area. Unlike the case of export an offering or functional area, an implementation project may also include tasks for an entire offering or a functional area but the list of tasks may have been customized to specific needs adding or removing some of the tasks.

Configuration Packages: Explained

A Configuration Package contains the setup import and export definition. The setup import and export definition is the list of setup tasks and their associated business objects that identifies the setup data for export as well as the data itself. When you create a configuration package only the setup export and import definition exists. Once you submit export, a snapshot of the appropriate setup data is added to the configuration package using the definition. You can continue making modifications to the setup data in the environment and create a new configuration package any time you need it.

You can generate the setup export and import definition implicitly or explicitly:

- A configuration package is created implicitly when you export setup data for an entire offering or any functional area from the Applications Administration page.
- A configuration package is created explicitly when you export setup data based on an implementation project. This method enables further customization of the configuration packages.

You generate the setup export and import definition by selecting an implementation project and creating a configuration package. The tasks and their associated business objects in the selected implementation project define the setup export and import definition for the configuration package. In addition, the sequence of the tasks in the implementation project determines the export and import sequence.

The tasks and their associated business objects in the selected configuration (offering, functional area or implementation project) define the setup export and import definition for the configuration package. In addition, the sequence of the tasks in the implementation project determines the export and import sequence.
Once a configuration package is exported, the setup export and import definition is locked and cannot be changed; that is, you cannot change the selection (add or remove) of tasks and their associated business objects, change their export and import sequence, nor the scope value selection. However, you can create a new configuration package with such modifications at any time.

**When does it make sense to create multiple configuration packages from the same implementation project?**

You can use the same implementation project to create many configuration packages. It's only useful to do so if the list of tasks in the implementation project has changed, or tasks and their associated business objects in the selected implementation project define the setup export or import definition for the configuration package. It's also useful if you use a custom export or import definition for different configuration packages.
12 Testing Your Implementation

Testing and Going Live: Explained

When you complete your implementation tasks, have your incentive compensation users create compensation plans and test the flows from transaction to payment in the test environment. Compensation analysts can try different plans and rules until they determine their final versions. You can purge the transaction data so analysts can start over when they need to correct their test data. When testing is completed, you can use a configuration package to move your setup to your production environment. You can also export the final compensation plans and rules to the production environment.

Purging Incentive Compensation Transactional Test Data: Procedure

You can test your new implementation by creating transactions and taking them through to payment. When you are ready to use Incentive Compensation live, use this procedure to purge all of your transaction data.

⚠️ Caution: The data will be completely purged and is not recoverable.

Prerequisites

Perform the following tasks or your purge will result in an error:

- Have other users sign out so they can’t perform transactions while the purge is running.
- Complete any paysheet approval requests.
- Complete the approval process for any disputes.

Procedure

To purge test transactional data:

1. Sign in as an Incentive Compensation Application Administrator.
2. Navigate to Scheduled Processes.
3. Click Schedule New Process.
4. Search for the Purge Incentive Compensation Transactional Test Data process.
5. Click OK.
6. In the Parameters region, select at least one and up to three business units to be purged. If you have any transactions in one business unit that also have credits in a different business unit, then you must select both business units to be purged.
7. Make sure all the transaction data in the selected business units is test data that no one will need in the future. Then select the I understand that purged data cannot be retrieved check box.
8. Click Submit.
What Data Is Purged

The following table contains the types of data that are purged:

<table>
<thead>
<tr>
<th>Table Name</th>
<th>Data Contained</th>
</tr>
</thead>
<tbody>
<tr>
<td>CN_TP_TRANSACTIONS_ALL</td>
<td>Transactions</td>
</tr>
<tr>
<td>CN_TP_CREDITS_ALL</td>
<td>Credits</td>
</tr>
<tr>
<td>CN_TP_EARNINGS_ALL</td>
<td>Earnings</td>
</tr>
<tr>
<td>CN_TP_TRANSACTIONS_ALL_H</td>
<td>Transaction History</td>
</tr>
<tr>
<td>CN_TP_CREDITS_ALL_H</td>
<td>Credits History</td>
</tr>
<tr>
<td>CN_TP_EARNINGS_ALL_H</td>
<td>Earnings History</td>
</tr>
<tr>
<td>CN_TP_JOB_STATISTICS_ALL</td>
<td>Collect Statistics</td>
</tr>
<tr>
<td>CN_TP_EVENT_LOGS_ALL</td>
<td>Changed Event Log</td>
</tr>
<tr>
<td>CN_TP_MEASURE_RESULTS_ALL</td>
<td>Measure Results</td>
</tr>
<tr>
<td>CN_DISPUTES_ALL</td>
<td>Disputes</td>
</tr>
<tr>
<td>CN_EST_CMP_TRANSACTIONS_ALL</td>
<td>Estimated Compensation Transactions</td>
</tr>
<tr>
<td>CN_EST_CMP_EARNINGS_ALL</td>
<td>Estimated Compensation Earnings</td>
</tr>
<tr>
<td>CN_EST_CMP_MSR_RESULTS_ALL</td>
<td>Estimated Compensation Measure Results</td>
</tr>
<tr>
<td>CN_EST_CMP_SCENARIOS_ALL_B</td>
<td>Estimated Compensation Scenarios</td>
</tr>
<tr>
<td>CN_EST_CMP_SCENARIOS_ALL_T</td>
<td>Estimated Compensation Scenarios</td>
</tr>
<tr>
<td>CN_EST_CMP_SCENARIOS_TXNS_ALL</td>
<td>Estimated Compensation Scenarios</td>
</tr>
<tr>
<td>CN_SR_P_SUBLEDGER_ALL</td>
<td>Participant Balances</td>
</tr>
<tr>
<td>CN_TP_PARTICIPANT_PAY_ALL</td>
<td>Payment Transactions</td>
</tr>
<tr>
<td>CN_TP_PAYRUNS_ALL</td>
<td>Payment Batches</td>
</tr>
<tr>
<td>Table Name</td>
<td>Data Contained</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>CN_TP_PAYSHEETS_ALL</td>
<td>Paysheets</td>
</tr>
<tr>
<td>CN_SRP_PER_FORM_METRICS_ALL</td>
<td>Period target and draw amounts assigned to a salesperson's plan component</td>
</tr>
</tbody>
</table>
Glossary

abstract role
A description of a person’s function in the enterprise that is unrelated to the person’s job (position), such as employee, contingent worker, or line manager.

assignment
A set of information, including job, position, pay, compensation, managers, working hours, and work location, that defines a worker’s or nonworker’s role in a legal employer.

balancing segment
A chart of accounts segment used to automatically balance all journal entries for each value of this segment.

business function
A business process or an activity that can be performed by people working within a business unit. Describes how a business unit is used.

business unit
A unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy.

chart of accounts
The account structure your organization uses to record transactions and maintain account balances.

credit category
A user-defined business revenue category (such as product line, customer accounts, service types, and geographical market segments) used to classify a transaction for compensation calculation. If a performance measure uses a transaction or credit attribute (such as margin), then associate the appropriate credit category with it.

credit transaction
Created by the crediting process. When transaction attributes match credit rule criteria, the process generates one or more credit transactions. Incentive processing uses credit transactions to create rollup transactions as well as to calculate commission, bonus, and other types of incentives.

division
A business-oriented subdivision within an enterprise. Each division is organized to deliver products and services or address different markets.
**document sequence**
A unique number that is automatically or manually assigned to a created and saved document.

**HCM data role**
A job role, such as benefits administrator, associated with instances of HCM data, such as all employees in a department.

**incentive compensation business unit**
A central center that administers incentive compensation for a group of participants. Associate participants within a single business unit with different business organizations or countries.

**incentive compensation transaction**
Any transaction for which the application collects the individual line items and uses them when calculating commissions, bonuses, and nonmonetary incentives. Also, create transactions manually. Examples are order, invoice, credit memo, charge back, and payment collected against an invoice. The type or source has no restrictions.

**incentive plan component**
Defines the computational requirements that the calculation process uses as well as stores information on how to compute the earning. It defines what performance measures to use in computation and an incentive formula to calculate the compensation earnings.

**job**
A generic role that is independent of any single department or location. For example, the jobs Manager and Consultant can occur in many departments.

**job role**
A role, such as an accounts payable manager or application implementation consultant, that usually identifies and aggregates the duties or responsibilities that make up the job.

**legal employer**
A legal entity that employs people.

**legal entity**
An entity identified and given rights and responsibilities under commercial law through the registration with country’s appropriate authority.

**participant**
A person or organization (for example, an employee, salesperson, party, supplier contract, partner, or third-party resale contractor) whose credits, attainment, earnings, disputes, and payments the application computes and manages.

**payment plan**
Contains rules regarding payment draw, draw recovery, and cap amounts to pay to associated participants. The payment process uses the plan to compute participant payment adjustment amounts against earnings for the period.
**performance measure**
An indicator that tracks participant progress toward a defined organizational goal or outcome as well as a metric for which you compensate your participants.

**person type**
A subcategory of a system person type, which the enterprise can define. Person type is specified for a person at the assignment level.

**position**
A specific occurrence of one job that is fixed within one department. It is also often restricted to one location. For example, the position Finance Manager is an instance of the job Manager in the Finance Department.

**primary ledger**
Main record-keeping ledger.

**reference data set**
Contains reference data that can be shared across a number of business units or other determinant types. A set supports common administration of that reference data.

**role**
Controls access to application functions and data.

**role mapping**
A relationship between one or more roles and one or more assignment conditions. Users with at least one assignment that matches the conditions qualify for the associated roles.

**security profile**
A set of criteria that identifies HCM objects of a single type for the purposes of securing access to those objects. The relevant HCM objects are persons, organizations, positions, countries, LDGs, document types, payrolls, and payroll flows.

**set**
Classified and grouped reference data that organizational entities share.

**work relationship**
An association between a person and a legal employer, where the worker type determines whether the relationship is a nonworker, contingent worker, or employee work relationship.