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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 configure and set up Incentive Compensation. It describes how to configure required common applications as well as setup tasks for Incentive Compensation. This guide does not cover your initial sign in, setting up users, or security.

Related Guides

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

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Related Topics

- Oracle Help Center
2 Implementation Overview

Setup and Maintenance: Overview

Oracle Functional Setup Manager enables rapid and efficient planning, configuration, implementation, deployment, and ongoing maintenance of Oracle Applications through self-service administration.

All Oracle Functional Setup Manager functionality is available from the Setup and Maintenance work area, which offers you the following benefits:

- **Self-Service Administration:**
  Manage all aspects of functional setup of Oracle Fusion applications at the business user level with an integrated, guided process for planning, configuration, implementation, deployment, and maintenance.

- **Configurable and Extensible:**
 Configure and Extend prepackaged list of tasks for setting up Oracle Fusion applications to better fit your business requirements.

- **Complete Transparency:**
  Get full visibility of Oracle Fusion applications end-to-end setup requirements with auto-generated, sequential task lists that include prerequisites and address dependencies.

- **Prepackaged Lists of Implementation Tasks:**
  Task lists can be easily configured and extended to better fit with business requirements. Autogenerated, sequential task lists include prerequisites and address dependencies to give full visibility to end-to-end setup requirements of Oracle Applications.

- **Rapid Start:**
  Specific implementations can become templates to facilitate reuse and rapid-start for comparable Oracle Applications across many instances.

- **Comprehensive Reporting:**
  A set of built-in reports helps to analyze, validate and audit configurations, implementations, and setup data of Oracle Applications.

With Oracle Functional Setup Manager you can:

- Learn about and analyze implementation requirements.
- Configure Oracle Applications to match your business needs.
- Achieve complete visibility to set up requirements through guided, sequential task lists downloadable into Excel for project planning.
- Enter setup data through easy-to-use user interfaces available directly from the task lists.
- Export and import data from one instance to another for rapid setup.
- Validate setup by reviewing setup data reports.
- Implement all Oracle Applications through a standard and consistent process.
Offerings: Explained

Offerings are application solution sets representing one or more business processes and activities that you typically provision and implement as a unit. They are, therefore, the primary drivers of functional setup of Oracle Fusion applications. Some of the examples of offerings are Financials, Procurement, Sales, Marketing, Order Orchestration, and Workforce Deployment. An offering is the highest level grouping of Oracle Fusion Applications functionality. They include functional areas, and alternative business rules known as features.

Functional Areas: Explained

A functional area is a grouping of functionality within an offering. It may be an optional piece of functionality that you may want to implement as part of an offering. Optional functional areas can be included or excluded from their parent offering. Functional areas may be hierarchical, and therefore may be subordinate to another functional area. An offering has at least one base or core functional area and may have one or more optional functional areas. Additionally, one or more or features may be associated to an offering. Base functional areas indicate the core functionality that you need to implement for the offering to be operational. Optional functional areas indicate optional functionality that you may or may not implement for an offering.

Common Functional Areas

Some core functionality essential to an offering such as setting the Initial Users or the Legal Structures may be shared across offerings. These are known as common functional areas and appear across offerings. Although most of the tasks associated to a common functional area are the same regardless of the offering you implement, there may be some offering-specific tasks.

In general once you implement a common functional area for a given offering, you won’t need to repeat its implementation for the remaining offerings, however, it’s recommended you check if there is any offering specific tasks that may still require your attention.

Base and Optional Functional Areas

Functional areas that support core functionality for an offering are known as base functional areas and must be implemented in order for the offering to be operational. Other functional areas known as optional functional areas support processes or functionality that can be implemented at your discretion depending on the business requirements. These can be implemented later during the implementation process.

Features: Explained

Offerings include optional or alternative business rules or methods called feature choices, used to fine-tune business processes and activities supported by an offering or a functional area. You make feature selections according to your business requirements to get the best fit with the offering. If the selected offerings and functional areas have dependent features then those features are applicable when you implement the corresponding offering or functional area.

Feature choices can be one of three different types:
Yes or No
If a feature can either be applicable or not be applicable to an implementation, a single check box is presented for selection. Check or deselect to specify yes or no respectively.

Single Select
If a feature has multiple choices but only one can be applicable to an implementation, multiple choices are presented as radio buttons. You can turn on only one of those choices.

Multi-Select
If the feature has multiple choices but one or more can be applicable to an implementation then all choices are presented with a check box. Select all that apply by checking the appropriate choices.

Implementation Task Lists: Explained
The configuration of the offerings determine how the list of setup tasks is generated during the implementation phase. Only the setup tasks needed to implement the selected offerings, functional areas and features are included in the task list. This gives you the targeted task list necessary to meet your implementation requirements.

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.

Implementing Offerings: Explained

Once you have configured the offering you want to implement, you can start performing the appropriate task to setting your applications up to support your business processes. Functional Setup Manager provides two methods to set up the offerings and therefore applications depending on your business needs.

Offering based implementation

Following a predefined list of tasks required for the features you selected to implement. This method enables you to implement the functionality on an adopt-as-you-go based approach. It provides you direct access to the setup tasks saving you time as by default gives you visibility to the minimum requirements for your implementation. This is always the recommended method to implement your applications unless you require custom implementation task lists.

Project based implementation

Enables you to customize your implementation defining an implementation project with a tailored list of tasks, task assignment and implementation progress monitoring. Use of this method is recommended when you require a custom task list.

Offering Based Implementation: Explained

You can use the Setup and Maintenance work area to directly implement an entire offering or functional areas within an offering. You do not need to create an implementation project, and instead use a modular approach to your implementation. You can complete setup of specific business areas quickly to start transactions, and then gradually adopt more and more application functionality as needed.

An offering or functional area-based approach means you set up various parts of an offering at different times. You can start with set up of the functional areas that you immediately need to adopt. Over time, you can continue to set up other functional...
areas as you start to adopt additional applications functionality. Offerings must be enabled for implementation in order for their functional areas to display. Offering or functional area-based implementation provides the following advantages:

- When you select an offering the relevant functional areas appear for selection. The common functional areas are those shared across offerings and are listed first. The functional areas that are only associated with the selected offering, are at the bottom of the list.

- A functional area usually has several setup tasks, but only a few of them require input before the application function is ready for transactions. The rest of the setup tasks are usually optional or have predefined default values based on common use cases. When you select a functional area for implementation, you can view just the required tasks, or you can view the full list of setup tasks for the functional area.

Executing Setup Tasks

You select the functional area you want to implement and the list of tasks that you need to perform appears. The tasks are organized with prerequisites and dependencies in mind. Select the task for which you want to enter data and then click Go to Task to render the page where you perform the task. If the setup data entered through a task can be segmented by a specific attribute, and therefore could be performed iteratively for each qualifying value, then the task may benefit from scope. Typical examples include tasks relevant to legal entities, business units, ledgers, tax regimes, and legislative data roles. For such tasks, you are prompted to pick a scope value before entering data. You can pick a scope value that was previously selected, select a new scope value, or create a new scope value and then select it. The selected value is a qualifying attribute of the setup data entered by way of the task, and therefore, different setup data can be entered for different scope values. Enter data as appropriate and once you finish, close the page and you return to the functional area list of tasks.

**Note:** You cannot perform a task if you do not have the proper security entitlement.

Project Based Implementation: Explained

You can create implementation projects to manage the implementation of an offering and functional areas as a unit throughout the implementation life cycle, or maintain the setup of specific business processes and activities customizing the list of tasks to complete their implementation.

An implementation project is the list of setup tasks you need to complete to implement selected offerings and functional areas. You create a project either by:

- selecting an offering and its functional areas you want to implement together, then customize the list of tasks for such offering and functional areas as applicable.

- selecting specific setup task lists and tasks you require for a specific configuration.

You can also assign these tasks to users and track their completion using the included project management tools.

Selecting Offerings

When creating an implementation project you see the list of offerings and functional areas that are configured for implementation. Implementation managers specify which of those offerings and functional areas to include in an implementation project. It is strongly recommended that you limit your selection to one offering per implementation project, even though the application does not prevent you from including more than one. The implementation manager should decide based on how they plan to manage their implementations. For example, if you implement and deploy different offerings at different times, then having separate implementation projects help to manage the implementation life cycles. Furthermore, the more offerings you included in an implementation project, the bigger the generated task list is. This is because the
implementation task list includes all setup tasks needed to implement all included offerings. Alternatively, segmenting into multiple implementation projects makes the process easier to manage and ensures that import and export sequence of the project data is straightforward in the correct sequence.
3 Common Applications Configuration: Defining Enterprise Structures for Incentive Compensation

Enterprise Structures: Overview

Oracle Fusion Applications have been designed to ensure your enterprise can be modeled to meet legal and management objectives. The decisions about your implementation of Oracle Fusion Applications are affected by your:

- Industry
- Business unit requirements for autonomy
- Business and accounting policies
- Business functions performed by business units and optionally, centralized in shared service centers
- Locations of facilities

Every enterprise has three fundamental structures, that describe its operations and provide a basis for reporting.

- Legal
- Managerial
- Functional

In Oracle Fusion, these structures are implemented using the chart of accounts and organization hierarchies. Many alternative hierarchies can be implemented and used for reporting. You are likely to have one primary structure that organizes your business into:

- Divisions
- Business Units
- Departments
Aligned these structures with your strategic objectives.

**Legal Structure**

The figure above shows a typical group of legal entities, operating various business and functional organizations. Your ability to buy and sell, own, and employ comes from your charter in the legal system. A corporation is:

- A distinct legal entity from its owners and managers.
- Owned by its shareholders, who may be individuals or other corporations.

Many other kinds of legal entities exist, such as sole proprietorships, partnerships, and government agencies.

A legally recognized entity can own and trade assets and employ people in the jurisdiction in which the entity is registered. When granted these privileges, legal entities are also assigned responsibilities to:

- Account for themselves to the public through statutory and external reporting.
- Comply with legislation and regulations.
- Pay income and transaction taxes.
- Process value added tax (VAT) collection on behalf of the taxing authority.

Many large enterprises isolate risk and optimize taxes by incorporating subsidiaries. They create legal entities to facilitate legal compliance, segregate operations, optimize taxes, complete contractual relationships, and isolate risk. Enterprises use legal entities to establish their enterprise’s identity under the laws of each country in which their enterprise operates.

In the figure above:

- A separate card represents a series of registered companies.
- Each company, including the public holding company, InFusion America, must be registered in the countries where they do business.
• Each company contributes to various divisions created for purposes of management reporting. These are shown as vertical columns on each card.

For example, a group might have a separate company for each business in the United States (US), but have its United Kingdom (UK) legal entity represent all businesses in that country.

The divisions are linked across the cards so that a business can appear on some or all of the cards. For example, the air quality monitoring systems business might be operated by the US, UK, and France companies. The list of business divisions is on the Business Axis.

Each company's card is also horizontally striped by functional groups, such as the sales team and the finance team. This functional list is called the Functional Axis. The overall image suggests that information might, at a minimum, be tracked by company, business, division, and function in a group environment. In Oracle Fusion Applications, the legal structure is implemented using legal entities.

Management Structure

Successfully managing multiple businesses requires that you segregate them by their strategic objectives, and measure their results. Although related to your legal structure, the business organizational hierarchies do not have to be reflected directly in the legal structure of the enterprise. The management structure can include divisions, subdivisions, lines of business, strategic business units, profit, and cost centers. In the figure above, the management structure is shown on the Business Axis. In Oracle Fusion Applications, the management structure is implemented using divisions and business units as well as being reflected in the chart of accounts.

Functional Structure

Straddling the legal and business organizations is a functional organization structured around people and their competencies. For example, sales, manufacturing, and service teams are functional organizations. This functional structure is represented by the Functional Axis in the figure above. You reflect the efforts and expenses of your functional organizations directly on the income statement. Organizations must manage and report revenues, cost of sales, and functional expenses such as research and development and selling, general, and administrative expenses. In Oracle Fusion Applications, the functional structure is implemented using departments and organizations, including sales, marketing, project, cost, and inventory organizations.

Defining the Enterprise for Incentive Compensation:
Managing Enterprise HCM Information

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
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.

Defining the Enterprise for Incentive Compensation: Managing Locations

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.

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
- Uploading Workforce Structures Using a Spreadsheet: Explained

FAQs for Managing Locations

Why can't I see my location in the search results?

You can search for approved locations only. Also, if you created a location in Oracle Fusion Trading Community Model, then you can’t access that location from Oracle Fusion Global Human Resources. For use in Oracle Fusion HCM, you must recreate the location from the Manage Locations page.
What happens if I inactivate a location?
Starting from the effective date that you entered, you can no longer associate the location with other workforce structures, assignments, or applications. If the location is already in use, it will continue to be available to the components that currently use it.

Defining Geographies

How Incentive Compensation Uses Geographies
Geographies can be used as qualifiers in crediting and classification rules. They are matched to transaction attributes such as city, state, country, and postal code.

Geography Structure, Hierarchy, and Validation: How They Fit Together
There are three components that are dependent on each other when defining a country: geography structure, geography hierarchy, and geography validation. Every country has to have the geography structure defined first before the hierarchy can be defined, and the geography hierarchy has to be defined before the validation can be defined.

Geography Structure
Firstly, you need to create a geography structure for each country to define which geography types are part of the country structure, and how the geography types are hierarchically related within the country structure. For example, you can create geography types called State, City, and Postal Code. Then you can rank the State geography type as the highest level within the country, the City as the second level, and the Postal Code as the lowest level within the country structure. Geography structure can be defined using the Manage Geographies task, or can be imported using tasks in the Define Geographies activity.

Geography Hierarchy
Once the geography structure is defined, the geographies for each geography type can be added to the hierarchy. For example, below the United States you can create a geography called California using a State geography type.

As part of managing the geography hierarchy you can view, create, edit, and delete the geographies for each geography type in the country structure. You can also add a primary and alternate name and code for each geography. A geography hierarchy can be created using the Manage Geographies task, or can be imported using tasks in the Define Geographies activity.

Geography Validation
After defining the geography hierarchy, you need to specify the geography validations for the country. You can choose which address style formats you would like to use for the country, and for each selected address style format you can map geography types to address attributes. You can also select which geography types should be included in geography or tax validation, and which geography types will display in a list of values during address entry in other user interfaces. The geography validation level for the country, such as error or warning, can also be selected.
Geography Structures: Explained

This topic describes geography structures and the tasks you can perform using geography structures.

A geography structure is a hierarchical grouping of geography types for a country. For example, the geography structure for the United States is as follows:

<table>
<thead>
<tr>
<th>Level</th>
<th>Geography Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>State</td>
</tr>
<tr>
<td>2</td>
<td>County</td>
</tr>
<tr>
<td>3</td>
<td>City</td>
</tr>
<tr>
<td>4</td>
<td>Postal Code</td>
</tr>
</tbody>
</table>

You can use the geography structure to relate geography types for a country and define geography types for a country.

Relate Geography Types for a Country

You can determine how a country’s geographies are hierarchically related by creating the hierarchy of the geography types in the geography structure. When you define a country’s structure, the geography type Country is implicitly at the top of the geography structure with the level 1. The subsequent geography types that you add after country are numbered in sequence.

You must add a geography type as a level in the country structure before you can define a geography for that geography type in a country. For example, before defining the state of California, the State geography type must be added to the United States country structure. To quickly create country structure, you can copy a structure from another country and modify the geography types for the country.

Define Geography Types for a Country

You can use any of the master reference geography types to create your geography structure. If required, you can create a geography type, before adding it to the country structure. Each geography type is added below the current lowest level.

 Lưu ý: You cannot delete geography types that have associated geography data. You can only delete the lowest level geography type of the country structure.

A geography type that you create within the country structure can be used for other country structures as well.

Geography Hierarchy: Explained

This topic describes geography hierarchy and various aspects of geography hierarchy.

Geography hierarchy is a data model that creates conceptual parent-child relationships between geographies. The top level of the geography hierarchy is country, which is the parent, and the hierarchy contains several child geographies. The following table shows sample parent-child relationships in a geography.
When you enter just 94065, the application determines that the postal code is in California and the corresponding city is Redwood City.

The application uses geography hierarchy information to facilitate business processes that rely on geography information, such as, tax calculation, order sourcing rules, and sales territory definition. The geography hierarchy information is centrally located and shared among other application offerings.

The geography hierarchy includes:

- Geography: Geography is a physical space with boundaries that is a defined instance of a geography type, such as country, state, province or city. For example, San Jose is a geography of the City geography type.
- Geography type: Geography types are divisional grouping of user defined geographies, for example, Continent, Country Regions, and Tax Regions.
- Geography usage: Geography usage indicates how a geography type or geography is used in the application.
- Master reference geography hierarchy: The geography hierarchy data is considered the single source of reference for all geography related data such as geography types and geographies. The geography usage for the entire hierarchy is the master reference, and defined geography types and geographies are the master reference geography types and geographies. For example, you can create geography types called State, City, and Postal Code. Then, you can rank the State as the highest level, City as the second level, and Postal Code as the lowest level within the country structure.
- User defined zones: User defined zones are a collection of geographical data, created from master reference data for a specific purpose. For example, while the territory zones are collections of master reference geographies ordered with a hierarchy, the tax and shipping zones are without a hierarchical grouping.

Geography Validation: Explained

Geography validation determines the geography mapping and validation for a country’s address styles, as well as the overall geography validation control for a country.

The **No Styles Format** address style format is the default address style format for a country. By defining the mapping and validation for this format you will ensure that validations can be performed for any address in the country. After the **No Styles Format** is defined you can set up additional mapping for specific address styles.

For each address style format, you can define the following:

- Map to attribute
- Enable list of values
- Tax validation
- Geography validation
- Geography validation control
Map to Attribute

For every address style format, you can map each geography type to an address attribute. For example, you can map the **State** geography type to the **State** address attribute for the United States, or map the **State** geography type to the **County** address attribute for the United Kingdom. The geography types that appear are based on how the country structure is defined. The list of address attributes that appear are based on address formats delivered with the application, or your customer defined address formats.

**Note:** You only need to map geography types that you want to use for geography or tax validation purposes.

Enable List of Values

Once a geography type is mapped to an attribute, then you can specify whether the geography type will appear in a list of values during address entry in user interfaces. It is very important to review carefully if you want to enable a list of values. You should only enable a list of values if you have sufficient geography data imported or created for that geography. If the setup for master geography data is incomplete, then the geography data is either not imported or created. As a result, the list of values for the address attribute does not list any geography data.

Once you have enabled a list of values for an address attribute, you can only select the geography data available for the geography type. This means that if a specific geography value is not available in the geography hierarchy, you cannot create an address with a different geography value.

Tax Validation

You can also specify whether a geography type will be included in tax validation. For example, for the United States North America address style format you specify that County, State, and City are used for tax validation. This will mean that when a transaction involves an address with the North America address style, the address must have the correct county, state, and city combination based on geography hierarchy data, to be considered valid for tax calculation.

Geography Validation

You can specify whether a geography type will be included in geography validation. This will mean that, for example, when the user enters a United States address using the North America address style format, the address must have the correct country, state, and postal code combination based on geography hierarchy data to be considered geographically valid.

If an address element is mapped to a geography type, but not selected for geography validation usage, then during address entry suggested values will be provided for the address element, but the address element will not be validated.

**Note:** For either the tax or geography validation, do not skip more than one consecutive level unless you are certain that the selected geography types can uniquely identify geographies. For example, the United States country structure is: State, County, City, and Postal Code, and you want to select just State and Postal Code for geography or tax validation. However, for the combination of California and 94065, the city can be either Redwood Shores or Redwood City. In this case, you should also select at least the City geography type for geography or tax validation.

Geography Validation Control

You can select the geography validation level for a country. Validation will check if the entered address maps to the geography hierarchy data available for the country, and the geography validation control determines whether you can save an address that did not pass validation during address entry. For example, if the validation level is **Error**, then an address cannot be saved if the values do not match the geography hierarchy data.

These are the geography validation levels you can choose:

- **Error** - only completely valid addresses can be saved, with all mandatory address elements entered.
• **No Validation** - all addresses can be saved including incomplete and invalid addresses.

Regardless of the result of validation, the validation process will try to map any address attribute to a geography of the country, and store any mapping it could establish based on the available data. This is called **Geography Name Referencing** and it is executed as part of validation. The result of this referencing is used in several business processes in the application to map an address to a specific geography or zone.

The Geography Dimension value in territories is derived from sell-to addresses of sales accounts. To use geography dimensions in territories, you must validate the geography elements in the addresses, such as state, city, and postal code. You can validate the address by enabling geography validation for each country using the Manage Geographies task. Perform the following in the Manage Geographies task:

- Enable at least one level in the geography hierarchy for geography validation.
- Enable geography validation for all geography levels that you intend to use for territory definition for each country.
- If needed, enable a list of values containing specific geography elements. This will help users search and select appropriate geography values during addresses entry and eliminate all possibilities of wrong address entry.

You can set geography validation control to Error in the Manage Geography Validation page. This ensures that users can only use valid geography elements in addresses.

> **Note:** If you have already created addresses before setting up geography validation for a country, you must enabling geography validation and then execute the Run Maintain Geography Name Referencing task for that country. This validates all your geography elements.

Managing Geography Structures, Hierarchies, and Validation: Worked Example

This example shows how to configure the geography structure, hierarchy, and validation for a country geography, using the United Kingdom country geography as an illustration.

The following table summarizes the key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy an existing country structure?</td>
<td>No, create a new country structure.</td>
</tr>
<tr>
<td>What is the structure of the geography types?</td>
<td>Create geography types with the following ranking structure:</td>
</tr>
<tr>
<td></td>
<td>1. County</td>
</tr>
<tr>
<td></td>
<td>2. Post Town</td>
</tr>
<tr>
<td>What is the geography hierarchy?</td>
<td>Create the following hierarchy:</td>
</tr>
<tr>
<td></td>
<td>1. Country of United Kingdom</td>
</tr>
<tr>
<td></td>
<td>2. County of Berkshire</td>
</tr>
<tr>
<td></td>
<td>3. Post Town of Reading</td>
</tr>
<tr>
<td>Which address style format will you use when mapping geography validations?</td>
<td>The default address style format, called the No Styles Format.</td>
</tr>
</tbody>
</table>
Decisions to Consider

Are you using Oracle Fusion Tax for tax purposes?

In This Example

No, do not select Tax Validation for the geography types.

---

### Defining the Geography Structure

Add the County and Post Town geography types to the United Kingdom geography structure.

1. On the Manage Geographies page, enter GB in the Code field. Click Search.
2. On the Manage Geographies page, click Structure Defined.
3. On the Manage Geography Structure page, click the Create button next to the Copy Country Structure From field.
4. In the Geography Structure section, select the County list item in the Add Geography Type field.
5. Click Add.
6. Select the Post Town list item in the Add Geography Type field.
7. Click Add.

### Defining the Geography Hierarchy

To create the geography hierarchy for United Kingdom, add the geographies for the County and Post Town geography types using the geography hierarchy user interfaces. You can also use the Manage File Import Activities task to import geography hierarchies using a .csv or xml file.

1. On the Manage Geographies page, enter GB in the Code field. Click Search.
2. On the Manage Geographies page, click Hierarchy Defined.
3. In the Geography Hierarchy section, click United Kingdom to highlight the table row, and click Create.
4. In the Create County page, Primary and Alternate Names section, enter Berkshire in the Name field.
5. Click Save and Close.
6. In the Geography Hierarchy section, click Berkshire to highlight the table row, and click Create.
7. In the Create Post Town page, Primary and Alternate Names section, enter Reading in the Name field.
8. Click Save and Close.

### Defining the Geography Validations

To specify the geography validations for the geography types you added to United Kingdom, define the geography mapping and validation for the United Kingdom default address style format. Then, map the geography types to attributes, enable the geography types for Lists of Values and Geography Validation, and set the geography validation level.

1. On the Manage Geographies page, click Validation Defined.
2. In the Address Style section, click No Styles Format to highlight the table row.
3. For the County geography type, click the County list item in the Map to Attribute field.
4. Select the Enable List of Values and Geography Validation options.
5. For the Post Town geography type, click the City list item in the Map to Attribute field.
6. Select the Geography Validation option.
7. In the Geography Validation Control section, select Error in the Geography Validation Level for Country list.
8. Click Save and Close.

---

### Geocoding: Explained

This topic explains geocoding and how to enable this option in the application.

Geocoding is the process of finding latitude and longitude coordinates from geographic data such as street addresses or zip codes. Once these coordinates are available, you can use the spatial services feature to identify points of interest, such as

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**Oracle**
as customer and contact addresses, in the vicinity. The application integrates the Geocoding feature with eLocation (http://elocation.oracle.com/maps_oracle_dot_com_main.html), which is a Geocoding service provided by Oracle.

By default, the Geocoding option is turned off in the application. You can enable the Geocoding option in the **Setup and Maintenance, Manage Geographies** page.

If the Geocoding feature is enabled, the feature can be scheduled to run at regular time intervals. This ensures that newly created or updated locations are picked up and geocoded whenever you create or update an address using the user interface, web services, bulk import, or file-based import.

**Related Topics**
- What are Spatial Services?

### Setting Up Geocoding: Procedure

This procedure lists the steps to set up geocoding in Oracle applications.

Geocoding is a process that determines the latitude and longitude coordinates for a location. By default, geocoding is turned off in the application. You can use geocoding to display customers in the vicinity of a mobile address.

#### Enabling Geocoding for a Country

To enable geocoding for a country, complete these steps:

1. From the Setup and Maintenance work area, search for Manage Geographies and click **Go to Task**.
2. Search the country for which you want to enable geocoding. You can either search by the country name or country code.
3. Click **Search**. The search results for the matching country names are displayed.
4. Select the country for which you want to enable the geocoding option.
5. Select **Geocoding Defined** for the country.

#### Populating Location Latitude and Longitude Information

Once geocoding is enabled, you can schedule this feature to run at regular time intervals so that newly created or updated locations are picked up and geocoded. To schedule the geocoding feature to run at regular intervals, complete these steps:

1. Navigate to the Scheduled Processes work area, and click **Schedule New Process**.
2. Click the Name drop-down and search for Populate Location Latitude and Longitude Information, and then click **OK**.
3. Enter the parameters such as Start Date and End Date, and click **Submit**.

### Importing Geographies: Explained

A geography, such as Tokyo or Peru, describes a boundary on the surface of the earth. You can create new geographies by importing data through interface tables. There are two options for populating the interface tables: using the tool of your preference to load the data or using file-based data import. If you plan to provide the data details in a source file, use the file-based import feature. If you will populate the interface table directly, run the geography loader process to import the data.

Having a good understanding of the import entity, interface table, and destination table will help you prepare your import data.

Consider the following when importing geographies:

- Nokia geography reference data
- File-based import option
Nokia Geography Reference Data

Oracle Sales Cloud includes third-party (Nokia) master geography data for multiple countries that can be easily imported. You can import Oracle-licensed Nokia data from Navteq, for those countries where the data is available, such as the U.S. You can import Nokia Geography data using the Manage Geographies task. Search for the country, and select Import Nokia Data from the Actions menu. If the licensed Navteq data is not available for a particular country, then the Import Nokia Data action is disabled.

File-Based Import Option

The file-based import process reads the data included in your XML or text file, populates the interface tables, and imports the data into the application destination tables. The File-Based Data Import Setup and Maintenance task list includes the tasks needed to configure the geography import object, create source file mappings, and schedule the import activities.

Geography Loader Process Option

Populate the interface table with your import data, then navigate to the Run Geography Loader Setup and Maintenance task to schedule the import of data from the interface table to the destination table.

Import Object Entity, Interface Table, and Destination Tables

The geography import object consists of one entity and interface table that forms the geography. If you are using file-based import, you can map your source file data to import entity attributes that correspond to the interface table columns. The import activity process populates the interface table based on the mapping and your source file. If using the geography loader scheduled process, populate the interface table directly using your preferred tool. If you need the unique IDs of existing application data for your import data, use the Define Data Export Setup and Maintenance task list to export the information.

The following lists the object entity, tables, and resulting application object:

<table>
<thead>
<tr>
<th>File-Based Import Entities</th>
<th>Interface Tables</th>
<th>Destination Tables</th>
<th>Application Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>ImpGeography</td>
<td>HZ_IMP_GEOGRAPHIES_T</td>
<td>HZ_GEOGRAPHIES</td>
<td>Geography</td>
</tr>
<tr>
<td></td>
<td></td>
<td>HZ_GEOGRAPHY_ IDENTIFIERS</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>HZ_GEOGRAPHY TYPES_B</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>HZ_HIERARCHY_Nodes</td>
<td></td>
</tr>
</tbody>
</table>

Nokia Geography Reference Data: Explained

Oracle Sales Cloud includes third-party Nokia master geography data that is available for import for the following countries.

<table>
<thead>
<tr>
<th>Country Name</th>
<th>Country Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andorra</td>
<td>AD</td>
</tr>
<tr>
<td></td>
<td>Country Name</td>
</tr>
<tr>
<td>---</td>
<td>-----------------</td>
</tr>
<tr>
<td>2.</td>
<td>Argentina</td>
</tr>
<tr>
<td>3.</td>
<td>Austria</td>
</tr>
<tr>
<td>4.</td>
<td>Belgium</td>
</tr>
<tr>
<td>5.</td>
<td>Brazil</td>
</tr>
<tr>
<td>6.</td>
<td>Bulgaria</td>
</tr>
<tr>
<td>7.</td>
<td>Canada</td>
</tr>
<tr>
<td>8.</td>
<td>Cayman Island</td>
</tr>
<tr>
<td>9.</td>
<td>Chile</td>
</tr>
<tr>
<td>10.</td>
<td>Croatia</td>
</tr>
<tr>
<td>11.</td>
<td>Czech Republic</td>
</tr>
<tr>
<td>12.</td>
<td>Denmark</td>
</tr>
<tr>
<td>13.</td>
<td>Dominican Republic</td>
</tr>
<tr>
<td>14.</td>
<td>Estonia</td>
</tr>
<tr>
<td>15.</td>
<td>Finland</td>
</tr>
<tr>
<td>16.</td>
<td>France</td>
</tr>
<tr>
<td>17.</td>
<td>Germany</td>
</tr>
<tr>
<td>18.</td>
<td>Greece</td>
</tr>
<tr>
<td>19.</td>
<td>Guadeloupe</td>
</tr>
<tr>
<td>20.</td>
<td>Hungary</td>
</tr>
<tr>
<td>21.</td>
<td>Iceland</td>
</tr>
<tr>
<td>22.</td>
<td>India</td>
</tr>
<tr>
<td>23.</td>
<td>Indonesia</td>
</tr>
<tr>
<td></td>
<td>Country Name</td>
</tr>
<tr>
<td>---</td>
<td>---------------</td>
</tr>
<tr>
<td>24.</td>
<td>Ireland</td>
</tr>
<tr>
<td>25.</td>
<td>Isle of Man</td>
</tr>
<tr>
<td>26.</td>
<td>Israel</td>
</tr>
<tr>
<td>27.</td>
<td>Italy</td>
</tr>
<tr>
<td>28.</td>
<td>Jamaica</td>
</tr>
<tr>
<td>29.</td>
<td>Latvia</td>
</tr>
<tr>
<td>30.</td>
<td>Liechtenstein</td>
</tr>
<tr>
<td>31.</td>
<td>Lithuania</td>
</tr>
<tr>
<td>32.</td>
<td>Luxembourg</td>
</tr>
<tr>
<td>33.</td>
<td>Malaysia</td>
</tr>
<tr>
<td>34.</td>
<td>Malta</td>
</tr>
<tr>
<td>35.</td>
<td>Martinique</td>
</tr>
<tr>
<td>36.</td>
<td>Mexico</td>
</tr>
<tr>
<td>37.</td>
<td>Netherlands</td>
</tr>
<tr>
<td>38.</td>
<td>New Zealand</td>
</tr>
<tr>
<td>39.</td>
<td>Norway</td>
</tr>
<tr>
<td>40.</td>
<td>Peru</td>
</tr>
<tr>
<td>41.</td>
<td>Poland</td>
</tr>
<tr>
<td>42.</td>
<td>Portugal</td>
</tr>
<tr>
<td>43.</td>
<td>Puerto Rico</td>
</tr>
<tr>
<td>44.</td>
<td>Reunion Island</td>
</tr>
<tr>
<td>45.</td>
<td>Romania</td>
</tr>
</tbody>
</table>
Common Applications Configuration: Defining Enterprise Structures for Incentive Compensation

<table>
<thead>
<tr>
<th></th>
<th>Country Name</th>
<th>Country Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>46.</td>
<td>Russian Federation (Russia)</td>
<td>RU</td>
</tr>
<tr>
<td>47.</td>
<td>San Marino</td>
<td>SM</td>
</tr>
<tr>
<td>48.</td>
<td>Slovakia</td>
<td>SK</td>
</tr>
<tr>
<td>49.</td>
<td>Slovenia</td>
<td>SI</td>
</tr>
<tr>
<td>50.</td>
<td>South Africa</td>
<td>ZA</td>
</tr>
<tr>
<td>51.</td>
<td>Spain</td>
<td>ES</td>
</tr>
<tr>
<td>52.</td>
<td>Swaziland</td>
<td>SZ</td>
</tr>
<tr>
<td>53.</td>
<td>Sweden</td>
<td>SE</td>
</tr>
<tr>
<td>54.</td>
<td>Switzerland</td>
<td>CH</td>
</tr>
<tr>
<td>55.</td>
<td>Taiwan</td>
<td>TW</td>
</tr>
<tr>
<td>56.</td>
<td>Turkey</td>
<td>TR</td>
</tr>
<tr>
<td>57.</td>
<td>United Kingdom</td>
<td>GB</td>
</tr>
<tr>
<td>58.</td>
<td>United States</td>
<td>US</td>
</tr>
<tr>
<td>59.</td>
<td>Uruguay</td>
<td>UY</td>
</tr>
<tr>
<td>60.</td>
<td>Holy See (Vatican City State)</td>
<td>VA</td>
</tr>
</tbody>
</table>

Replacing Existing Master Geography Data with Revised Nokia Geography Data: Procedure

You must import and set up reference geography data for the countries where you do business. Using the Nokia geography reference data, you no longer have to source geography data from a third party. You can import Oracle-licensed Nokia data from NAVTEQ, including the country structure and hierarchy information, either to create a new geography setup or replace your existing geography data.

This topic describes the steps to replace your existing master geography data with the revised Nokia geography data.
Creating an Export File of All Territories

You must export all territories before deleting the master geography data because removing the master geography data invalidates the territory definitions that are based on the Geography dimension. You can either export the definitions of all territories to a file or make manual corrections. If there are a large number of territories, export the territories definition to a file that can be used during the territories import process. However, if there are very few affected territories, then you can choose to either export the territories definition to a file or make corrections manually.

This procedure is applicable only if there are territories defined using the Geography dimension.

Perform the following steps to create an export file of all territories.

1. From the Territories and Quotas work area, click View Active Territories in the Tasks pane.
2. In the View Active Territories page, select the top territory.
3. Click the Actions drop-down list, and select Export, and then Export Selected Territory Hierarchy.
4. In the Warning dialog box, click OK.
5. Click the Actions drop-down list and select Export, and then View Export Status.
6. Review the status of the export job and verify if it has completed successfully.
7. In the Exported Data File column, click the .zip file against your export job, and click Save. All the territories are exported to a compressed file on your system.
8. Click OK.
9. Click Done in the View Active Territories page.

Deleting the Territory Geography Data

A territory definition has references to the territory geography data and master geography data. Since territory geography data is based on the master geography data, you must delete the territory geography data prior to deleting the master geography data. When you delete the territory geography data, all territories that are defined using geography dimension become invalid.

This procedure is applicable only if territory geographies are defined.

Perform the following steps to delete the territory geography data.

1. From the Setup and Maintenance work area, search for Manage Territory Geographies and click Go to Task.
2. In the Manage Territory Geographies page, click View All Hierarchies.
3. Select the top node for the country for which you want to replace the master geography data and click the Delete icon.
4. In the Warning dialog box, click OK.
5. In the Confirmation dialog box, click OK. The parent node of the territory geography data and its children are deleted.
6. Repeat steps 3 to 5 to delete all top nodes in the territory geography data.
7. Click Save and Close.

Although the territory geography data is deleted, the territory definitions may appear to remain valid. This is because the Territory Management application retains a copy of the dimension members referenced in the territory definitions. This copy is updated when you trigger the Load and Activate process from the Enable Dimensions and Metrics task.

Deleting the Master Geography Data

To delete the master geography data for a country, you must create a support request with proper justification. Note that when the master geography data is deleted, the geography and its children are deleted and all the related territory, tax, and shipping zone references become invalid. So you must take backup of these before deleting the master geography data.
Importing Nokia Geography Reference Data

Use this procedure to import Nokia geography reference data licensed by Oracle. If the country data you want to import is not available, then the Import Nokia Data action is disabled.

The geography data is provided by Nokia and is third-party content. As per Oracle policy, this software and documentation provide access to or information about content and services from third parties. Oracle and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content and services. Oracle and its affiliates are not responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Perform the following steps to import Nokia geography reference data. Currently, the revised Nokia geography reference data is available only for US at this time.

1. From the Setup and Maintenance work area, search for Manage Geographies, and click Go to Task.
2. In the Manage Geographies page, enter either the country name or the two-letter ISO code (for example, US), and click Search.
3. Select the country in the search results.
4. Click the Actions drop-down list, and select Import Nokia Data.
5. In the Warning dialog box, click OK.
6. In the Confirmation dialog box, click OK.

The import of larger countries may require several hours to complete.

You can track the progress of the import process by selecting Scheduled Processes from the Navigator menu.

**Note:** To access the Scheduled Processes work area, you must be signed in as a user with the Employee abstract role. The initial user does not have this role assigned, but the other users you created do.

After the import is complete, you can search for the country again in the Manage Geographies page. Check marks now appear in the Structure Defined and Hierarchy Defined columns indicating the import completed successfully.

Next, click the Validation Defined icon to define the validations, enable List of Values, and choose address style format for a country as set up before. For more information, see the "Geography Validation: Explained" topic.

The Geocoding Defined and Address Cleansing Defined columns are used for additional features which you must license from Oracle and set up separately.

- Geocoding makes it possible to display customers in the vicinity of a mobile address. You set up Geocoding Enabled for those countries where you are using Around Me functionality in Sales Cloud Mobile.
Cleansing makes it possible to validate addresses down to the street level.

Running the Geography Name Referencing Process

The Geography Name Referencing (GNR) process validates address elements in location tables, such as HZ_LOCATIONS, against the master geography data.

Perform the following steps to run the GNR process.

1. Navigate to the Scheduled Processes work area, and click Schedule New Process.
2. Click the Name drop-down list and search for Validate Geographies Against Master Geographies, and then click OK.
3. Click OK in the Schedule New Process dialog box.
4. In the Process Details dialog box, enter the following details:
   - Location Table Name: HZ_LOCATIONS
   - Run Type: ALL
   - Usage Code: GEOGRAPHY
5. Enter the country code in the Country Code field.
6. Click Submit.
7. In the Confirmation dialog box, click OK.
8. Click Close.
9. In the Scheduled Processes page, click the Refresh icon.
10. Verify if the status of the process has completed successfully.

Recreating and Loading the Territory Geography Data

You can recreate the territory geography data, after the master geography data is imported, using either of the following methods:

- Import process: If you created the original territory geography data using the import process, then use the same import file to recreate the territory geography structure.
  For more information about importing the territory geography data using the import file, see "Importing Territory Geography Hierarchies Using File-Based Data Import: Quick Start" in the Oracle Sales Cloud Understanding File-Based Data Import and Export guide.

- Manual creation process: You can manually recreate the territory geography data structures, as they existed before their deletion, using the Manage Territory Geographies task.
  For more information about creating zones and adding geographies to a zone, see "Managing Territory Geographies: Worked Example" topic.

After you have recreated the territory geography data, perform the following steps to load the data.

1. From the Setup and Maintenance work area, search for Enable Dimensions and Metrics, and click Go to Task.
2. In the Enable Dimensions and Metrics page, click the Actions drop-down list, and select Load and Activate. The process loads the territory geography data to make dimension members available for selection when defining territories.
3. In the Confirmation dialog box, click OK.
4. Click Done.

Restoring the Invalid Territory Definitions

After recreating the territory geography hierarchies and running the Load and Activate option from the Enable Dimensions and Metrics task, the geography dimensions are populated with the new geography members. The geography members
in the territory appear as invalid because your territories still reference the old copies of the dimension members that were deleted. The new members are not referenced automatically by the territories. You must re-reference the territory definitions from the old geography dimension members to the new ones.

You can restore the invalid territory definitions by either importing the previously created export file or making manual corrections to the territories.

• Restoring Valid Territory Definitions Using Territories Import

  a. Open the export file you saved in the "Creating an Export File of All Territories" step. The compressed file contains four CSV files.
  b. Open TERR_HEADER.CSV file.
  c. Enter REPLACE in the Action column for all territories that are based on geography dimension.
  d. Save the file in CSV format and compress it together with three other CSV files.
  e. From the Territories and Quotas work area, click View Active Territories in the Tasks pane.
  f. Click the Actions drop-down list, and select Import to Proposal, and then Import Territories.
  g. Select the newly created compressed file and click OK.
  h. Click the Actions drop-down list and select Import to Proposal, and then View Import Status.
  i. Review the status of the export job and verify if it has completed successfully.
  j. Click OK.
  k. From the Tasks pane, click Manage Territory Proposals.
  l. In the Manage Territory Proposals page, under Current Territory Proposals table, search for the proposal with your import file name.
  m. Click the import file name to open the territory proposal.
  n. Click Edit Coverage to verify that the territory definitions are valid.
  o. Verify that there are no values listed as invalid in the Selected Dimension Members section.
  p. Click Save and Close.
  q. Click Activate. The territory proposal of your import file is activated.

• Restoring Valid Territory Definitions through Manual Corrections

Although this method is always applicable, it is most appropriate when you have to restore territory definitions for a smaller number of territories.

  a. From the Territories and Quotas work area, click Manage Territory Proposals in the Tasks pane.
  b. In the Manage Territory Proposals page, click the Create icon.
  c. In the Create Territory Proposals dialog box, enter a name and click Save and View.
  d. In the Territory Proposals page, add all the territories with the Geography dimension value other than the value "Any" to the proposal.
  e. Select a territory and click Edit Coverage.
  f. In the Edit Coverage page, select Geography from the Dimensions drop-down list. The invalid dimension members are displayed in the Selected Dimension Members pane.
  g. Expand the values in the Available Dimension Members section or search for the member that has the same name as the one marked invalid in the Selected Dimension Members pane.
  h. Select one or more new geography dimension members from Available Dimension Members pane and click Add icon to the Selected Dimension Members pane.
  i. Click the Remove icon to remove the invalid members from the Selected Dimension Members pane.
  j. Click Save and Close.
  k. Repeat steps 4 to 10 for all territories that were based on Geography dimension.
l. Click **Activate**. After the activation process is complete, your territory definitions are valid again and are referencing to the new geography data.

### Running Batch Assignment Process for Opportunities

- **From Navigator, click Scheduled Processes.**
- **In the Schedule Processes page, click Schedule New Process.**
- **In the Schedule New Process dialog box, search for the Revenue Territory Based Assignment process and select it.**
- **Click OK.**
- **In the Process Details dialog box, enter OpenOpportunitiesByCreationDate in the View Criteria Name field. This selects all revenue lines belonging to open opportunities that were created in the last ‘X’ days.**
- **Enter BindOptyCreationDateFrom= followed by the date.**
  For example, if BindOptyCreationDateFrom=2014-01-01, then all open opportunities which were created between 1st January 2014 till the current date, are processed.
- **Click Submit to schedule the process.**
- **In the Confirmation dialog box, make a note of the process identifier for monitoring the process, and click OK.**
- **Click Close.**
- **In the Schedule Processes page, click the Refresh icon.**
- **Review the status of the process job and verify if it has completed successfully.**

▶️ **Note:** Review a small subset of the open opportunities to confirm that the territory assignment is as expected.

### Running Batch Assignment Process for Sales Accounts

- **Ensure that the ZCA_SA_AUTO_ASSIGN_ON_CREATE and ZCA_SA_AUTO_ASSIGN_ON_UPDATE profile options are set to Yes in the Manage Customer Center Profile Options task.**
- **From Navigator, click Customers.**
- **In the Customers page, click Create Account.**
- **In the Create Account page, enter a name and address of the sales account, and select the Address is sell to check box.**
- **Click Save and Close.**
- **From Navigator, click Customers.**
- **In the Search pane, search for the name of the sales account you created and select it.**
- **Under Customer Information, select Sales Account Team. The details of the sales account and territories associated with the sales account are displayed.**

  This indicates that the sales account was created successfully and the batch assignment was run automatically to assign the matching territories to the sales account.

To run the batch assignment process manually from the Scheduled Processes page, perform the following steps.

- **From Navigator, click Scheduled Processes.**
- **In the Schedule Processes page, click Schedule New Process.**
- **In the Schedule New Process dialog box, search for the Request Sales Account Assignments process and select it.**
- **Click OK.**
e. Enter `SalesAccount_Work_Object` in the Work Object Code field and `SalesAccountTerritory_Candidate_Object` in the Candidate Object Code field.

f. Select `Territory` in the Assignment Mode list.

g. Enter `AllSalesAccountsVC` in the View Criteria Name field. This selects all sales accounts.

h. Click `Submit` to schedule the process.

i. In the Confirmation dialog box, make a note of the process identifier for monitoring the process, and click `OK`.

j. Click `Close`.

k. In the Schedule Processes page, click the `Refresh` icon.

l. Review the status of the process job and verify if it has completed successfully.

**Note:** Review a small subset of the accounts to confirm that the territory assignment is as expected.

**Related Topics**

- Managing Territory Geographies: Worked Example

### Creating Countries: Procedure

This procedure lists the steps to create countries in Oracle Sales Cloud.

In Oracle Sales Cloud, countries are pre-seeded. If you are unable to find a specific country in the Manage Geographies page, then you can add it to the application.

**Note:** Oracle Sales Cloud provides support for Nokia geography data for 60 countries. For more information on the list of countries, see the Nokia Geography Reference Data: Explained topic. For countries where Nokia geography data is not available, you can purchase the geography data from a third-party data provider and load it into the application using File-Based Data Import. For more information, see the Importing Geographies chapter in the Oracle Sales Cloud Understanding File-Based Data Import and Export guide. If countries are not available in the application, then use the procedure outlined in this topic to create them.

Perform the following steps to create a new country.

1. From the Setup and Maintenance work area, search for Manage Territories and click `Go to Task`.

2. Click the `New` icon.

3. Enter the following details:
   - Territory Code: Enter a unique code for the territory.
   - Territory Name: Enter a unique name for the territory.
   - Description: Enter a description for the territory.

4. Click `Save and Close`.

   **Note:** After you have added a new country in the application, if you want to import the geography data for that country, then you must perform Step 5 to 10.

5. From the Setup and Maintenance work area, search for Manage Geographies and click `Go to Task`.

6. In the Manage Geographies page, enter either the country name or the two-letter ISO code for the country you just added, and click `Search`.  

---

**Oracle**
7. Select the country in the search results.
8. Click the Actions drop-down, and select Create Country.
9. In the Create Country dialog box, select the name of the country and click Save.
10. Click Done.

Importing Geographies Using File-Based Import: Explained

This topic explains how to prepare and import geography data from an external data source using the File-Based Data Import feature. A geography is any region with a boundary around it, regardless of its size. It might be a state, a country, a city, a county, or a ward. You must create or import geographies before you can associate them with custom zones and addresses.

**Note:** The application ships with third-party (Nokia) master geography data for multiple countries that can be easily imported. You can import Oracle-licensed Nokia data from Navteq, for those countries where the data is available, such as the U.S. You can import Nokia Geography data using the Manage Geographies task. Search for the country, and select Import Nokia Data from the Actions menu. If the licensed Navteq data is not available for a particular country, then the Import Nokia Data action is disabled. For more information, see Replacing Existing Master Geography Data with Revised Nokia Geography Data: Procedure. If Nokia geography data is not available for a country, then use the information in this chapter to import it using File-Based Data Import.

Consider the following questions when importing your data:

- How does your legacy system or source system represent the geography data compared to how Oracle applications represent the same data?
- Do you have to configure values in the application to map to your data values?
- What import features are available for importing your business object?
- How do you verify your imported data?

Comparing Business Object Structures

You must understand how your geography data corresponds with the data in the application so that you can map your legacy data to the data that the application requires. First, you must understand how the application represents the structure of the data for a geography.

You must import a separate country structure import object for each country. Each of these import objects must contain the geography types that are used in the country's structure, organized in a hierarchy using geography level numbers. For example, if you are importing the country structure of Australia, the country structure could be the following: 1: Country, 2: State, 3: County, 4: Town, 5: ZIP.

Import Objects for the Geography

To facilitate importing geographies, the application incorporates the structure of the geography into import objects. The import object for the geography is ImpGeography.

Comparing Business Object Data

Each import object is a collection of attributes that helps to map your data to the application data and to support one-to-many relationships between the structural components that make up the geography.

You must understand the attribute details of the import objects so that you can prepare your import data. You can use reference guide files that contain attribute descriptions, values that populate attributes by default when you do not provide values, and validation information for each import object attribute. The validation information includes the navigation path to the task where you can define values in the application. For example, if you have values in your data that correlate to a choice...
list in the application, then the validation information for that attribute provides the task name in the Setup and Maintenance work area where you can define your values. For additional information, including a list of reference guide file names and locations that you need to complete this task, see the following table.

<table>
<thead>
<tr>
<th>Import Object</th>
<th>Related Import Object Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>ImpGeography</td>
<td>Geography Import Objects: How They Work Together</td>
</tr>
</tbody>
</table>

**Note:**
You can use the keyword importing geographies to search for related topics in Help.

**Extensible Attributes**
The application doesn’t support extensible attributes for geographies. You can import only data for geography object that already exist by default in the application.

**Importing Geographies Using File-Based Data Import**
For the geography business object, you must use the File-Based Data Import feature. You prepare XML or text source data files in a form that is suitable for a file-based import. The file-based import process reads the data in your source file, populates the interface tables according to your mapping, and imports the data into the application destination tables.

The Define File-Based Data Import Setup and Maintenance task list includes the tasks that are required to configure the import objects, to create source-file mappings, and to schedule the import activities. You submit file-based import activities for each import object. When you’re creating a new geography, you import the Geography object. You must be assigned the Master Data Management Administrator job role to access and submit the import activities for geographies.

When importing geography information, you must provide the parent reference information for all parent levels for the entity.

**Verifying Your Imported Data**
Oracle applications provide File-Based Import activity reports, which you can use to verify imported data. Users with the Master Data Management Administrator job role can also navigate to the Manage Geographies work area to view the imported geographies.

**Related Topics**
- File-Based Data Import: How It Works
- Getting Started with File-Based Import: Documentation Overview

**Geography Import Objects: How They Work Together**
This topic describes the Geography import object. You use the Geography import object to import geography information.

This topic introduces the following:
- Target objects for the Geography import object
- Target import object attributes
- Reference guide files for target import object attributes
Geography Target Import Objects

You can use the Geography import object to import geography hierarchy information to create or update the geography data of a country. To map the source data in your import file to the target attributes in the application, you must understand how the target objects are related and what attributes are included in each target object.

The target import objects in the Geography import object contain information about the geography hierarchy. When updating an existing geography, you must provide the parent reference information of the existing geography, which connects the geography to the country of which it is a part.

Use the ImpGeography target import object to create and update geography information.

*Note:* Before you import geography data for a country, you must define the country’s geography structure.

Target Import Object Attributes

You must compare the attributes that you want to import with the target object attributes that are available and with their valid values. To evaluate your source data and Oracle Sales Cloud attributes for mapping and validation, you use a reference file. See the File Based Data Import for Oracle Sales Cloud guide available on the Oracle Sales Cloud Help Center (https://docs.oracle.com/cloud/latest/salescs_gs/docs.htm). In the File Based Data Imports chapter, see the topic for your import object of interest, which includes links to reference files for target import objects. A reference guide file includes attribute descriptions, default values, and validations performed by the import process. Review the validation for each attribute to determine whether there are functional prerequisites or prerequisite setup tasks that are required.

To import your source file data, you define a mapping between your source file data and the combination of the target object and target object attribute. You can predefine and manage import mappings using the Manage File Import Mappings task, or you can define the mapping when you define the import activity using the Manage File Import Activities task. Both tasks are available in the Setup and Maintenance work area.

*Note:* If any of the attributes you want to import do not have an equivalent target object attribute, then review the Application Composer extensibility features for geography.

Reference Files for Target Import Object Attributes

To access the reference guide files for the geography’s target import objects, see the File Based Data Import for Oracle Sales Cloud guide available on the Oracle Sales Cloud Help Center (https://docs.oracle.com/cloud/latest/salescs_gs/docs.htm). In the File Based Data Imports chapter, see the topic for your import object of interest, which includes links to reference files for target import objects. For detailed information on importing geographies using file-based import, refer to Document No. 1481758.1, Importing Master Reference Geography Data, on the Oracle Support site.

The following table lists the reference files that are available by target import object.

<table>
<thead>
<tr>
<th>Target Import Object</th>
<th>Description</th>
<th>Attribute Reference Guide File Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>ImpGeography</td>
<td>Contains information that captures a country’s geography hierarchy details, such as geography type, geography code, etc.</td>
<td>HZ_IMP_GEOGRAPHIES_T_Reference</td>
</tr>
</tbody>
</table>

Related Topics

- File-Based Data Import: How It Works
Chapter 3
Common Applications Configuration: Defining Enterprise Structures for Incentive Compensation

• Getting Started with File-Based Import: Documentation Overview

Importing Geographies Using File-Based Data Import: Worked Example

This example demonstrates how to import data using the File-Based Data Import tool. In this example, you have a source file containing geography data that you want to import into the application so that the geography data can be used for real-time address validation and tax purposes.

The following table summarizes the key decisions that you must make in this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>What type of object are you importing?</td>
<td>Geography</td>
</tr>
<tr>
<td>What file type are you using for your source data?</td>
<td>Text file</td>
</tr>
<tr>
<td>Where are you uploading your source data file from?</td>
<td>Your desktop</td>
</tr>
<tr>
<td>What data type is your source data file?</td>
<td>Comma separated</td>
</tr>
<tr>
<td>Which fields are you importing into the application?</td>
<td>All, except for the RecordTypeCode field</td>
</tr>
<tr>
<td>When do you want to process the import?</td>
<td>Immediately</td>
</tr>
</tbody>
</table>

Summary of the Tasks

You perform the following steps to create an import activity and activate the import:

1. Determining what information is in the source file.
2. Creating and scheduling the import activity.
3. Monitoring the import results.

Prerequisites for Importing Additional Geography Data After Your Initial Import

1. Ensure that the combination of the Source ID and Parent Source ID values is unique for each row of data within a single import. However, your source data files don’t need to have the same Source ID and Parent Source ID values as your previously imported geography data. If the geography structure levels and the parents for each geography value are the same, then the changed IDs will not affect the import.

2. Ensure that all the parents of a child geography are included in your data file so that the child geography can be added. For example, if you originally imported US, CA, and San Francisco, and now you want to import the city of San Jose in CA, then your data file must include US, CA, and San Jose.

3. Check that your source data file has the correct values for the geography data that you have already loaded. For example, if your initial import included the value US for country and CA as state, and in a subsequent import you have California as a state, then your geography import creates two state records (CA and California) in the application data, with the US as the country parent.
Determining What Information is in the Source File

1. The source geography data files must include a unique Source ID value for each row of data and Parent Source ID value for the parent of that row of data. The Source or Parent Source IDs should not be longer than 18 characters.
2. You can structure your geography source data as follows:

<table>
<thead>
<tr>
<th>Geography Level</th>
<th>Name</th>
<th>Source ID</th>
<th>Parent Source ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 (Country)</td>
<td>US</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2 (State)</td>
<td>CA</td>
<td>11</td>
<td>1</td>
</tr>
<tr>
<td>3 (County)</td>
<td>Alameda</td>
<td>111</td>
<td>11</td>
</tr>
<tr>
<td>4 (City)</td>
<td>Pleasanton</td>
<td>1111</td>
<td>111</td>
</tr>
<tr>
<td>4 (City)</td>
<td>Dublin</td>
<td>1112</td>
<td>111</td>
</tr>
</tbody>
</table>

Creating and Scheduling the Import Activity

You can create an import activity, enter the import details, and schedule the import. An import activity includes selecting the source file or file location, mapping the source file to the database, and scheduling the import.

1. In the Setup and Maintenance work area, search for the Manage File Import Activities task. Click Go to Task.
2. In the Manage Import Activities page, click Create.
3. In the Create Import Activity: Map Fields page, map each field from your source file to the target object and attribute, as shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Master Reference Geographies</td>
</tr>
<tr>
<td>Object</td>
<td>Geography</td>
</tr>
<tr>
<td>File Type</td>
<td>Text File</td>
</tr>
<tr>
<td>File Selection</td>
<td>Specific file</td>
</tr>
<tr>
<td>Upload From</td>
<td>Desktop</td>
</tr>
<tr>
<td>File Name</td>
<td>Choose relevant file from desktop</td>
</tr>
<tr>
<td>Data Type</td>
<td>Comma separated</td>
</tr>
</tbody>
</table>

Note: Ensure that the file type that you select in the Create Import Activity: Set Up page matches the file type of the source data file.

4. Click Next.
5. In the Create Import Activity: Map Fields page, map each field from your source file to the Oracle Sales Cloud database object and attribute, as shown in the following table.

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Example Value</th>
<th>Ignore</th>
<th>Object</th>
<th>Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Geography Name</td>
<td>Primary Geography Name</td>
<td>United States</td>
<td>Imp Geography</td>
<td>Primary Geography Name</td>
</tr>
<tr>
<td>Country Code</td>
<td>US</td>
<td>No</td>
<td>Imp Geography</td>
<td>Country Code</td>
</tr>
<tr>
<td>Record Type Code</td>
<td>0</td>
<td>Yes</td>
<td>Imp Geography</td>
<td>Record Type Code</td>
</tr>
<tr>
<td>Source ID</td>
<td>10265</td>
<td>No</td>
<td>Imp Geography</td>
<td>Source ID</td>
</tr>
<tr>
<td>Parent Source ID</td>
<td>1053</td>
<td>No</td>
<td>Imp Geography</td>
<td>Parent Source ID</td>
</tr>
</tbody>
</table>

If you don’t want to import a column in the text file, then you can select Ignore.

**Note:** If you can’t map the fields from your source file to the relevant target object, then see the import object spreadsheets.

6. Click Next.
7. In the Create Import Activity: Create Schedule page, select Immediate in the Schedule field so that the import will start as soon as you activate it.

Instead of immediately importing the data, you can choose a date and time to start the import. You can also specify whether the import will be repeated and the frequency of the repeated import.

8. Click Next.

### Monitoring the Import Results

You can monitor the processing of the import activity and view the completion reports for both successful records and errors.

1. In the Create Import Activity: Review and Activate page, verify your import details in the Import Details, File Details, Import Options, and Schedule sections. Update the import details if required by navigating to the previous screens using the Back link.

2. Confirm your import details, and click Activate to submit the import.

After the import activity has finished, the Status field value changes to Completed.

**Related Topics**
- File-Based Import Processing: How it Works

### Importing Country Structures Using File-Based Import: Explained

This topic explains how to prepare and import country structure data from an external data source using the File-Based Data Import feature. A country structure is a hierarchical grouping of geography types for a country. For example, the geography structure for the United States has the geography type of State at the top, followed by the County, then the City, and finally the Postal Code.
You can use the country structure to set up the following:

- The relationships between geographies within a country
- The types of geographies that you can define for a country

Consider the following questions when importing your data:

- How does your legacy system or source system represent the geography data compared to how the application represents the same data?
- Do you have to configure values in the application to map to your data values?
- Do you have to customize the application to capture additional attributes that are critical to the way you do business?
- What import features are available for importing your business object?
- How do you verify your imported data?

Comparing Business Object Structures

You must understand how your country structure data corresponds with the data in the application so that you can map your legacy data to the data that the application requires. First, you must understand how the application represents the structure of the data for a country structure.

You must import a separate country structure import object for each country. Each of these import objects must contain the geography types that are used in the country’s structure, organized in a hierarchy using geography level numbers. For example, if you’re importing the country structure of Australia, the country structure could be the following: 1: Country, 2: State, 3: County, 4: Town, 5: ZIP.

Import Objects for the Country Structure

To facilitate importing country structures, the application incorporates the structure of the country structure into import objects. The import object for country structures is GeoStructureLevel.

Comparing Business Object Data

Each import object is a collection of attributes that helps to map your data to the application data and to support one-to-many relationships between the structural components that make up the country structure.

You must understand the attribute details of the import objects so that you can prepare your import data. You can use reference guide files that contain attribute descriptions, values that populate attributes by default when you don’t provide values, and validation information for each attribute. The validation information includes the navigation path to the task where you can define values in the application. For example, if you have values in your data that correlate to a choice list in the application, then the validation information for that attribute provides the task name in the Setup and Maintenance work area where you can define your values. For additional information, including a list of reference guide file names and locations that you need to complete this task, see the following table.

<table>
<thead>
<tr>
<th>Import Object</th>
<th>Related Import Object Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country Structure</td>
<td>Country Structure Import Objects: How They Work Together</td>
</tr>
</tbody>
</table>

Extensible Attributes

If you need to extend the application object to import your legacy or source data, you must use Application Composer to design your object model extensions and to generate the required artifacts to register your extensions and make them available for importing. The corresponding import object is updated with the extensible attributes, which can then be mapped.
to your source file data. You can use the same source file to import both extensible custom attributes and the standard import object attributes.

**Importing Country Structures Using File-Based Data Import**

For the country structure business object, you must use the File-Based Data Import feature. You prepare XML or text source data files in a form that is suitable for a file-based import. The file-based import process reads the data in your source file, populates the interface tables according to your mapping, and imports the data into the application destination tables.

The Define File-Based Data Import Setup and Maintenance task list includes the tasks that are required to configure the import objects, to create source-file mappings, and to schedule the import activities. You submit file-based import activities for each import object. When you’re creating a new country structure, you import the Country Structure object. You must be assigned the Master Data Management Administrator job role to access and submit the import activities for country structures.

**Verifying Your Imported Data**

You can view the list of import activities from the Manage Import Activities page. You can verify your imported data by clicking the Status column for your import activity.

**Related Topics**

- File-Based Data Import: How It Works
- Getting Started with File-Based Import: Documentation Overview
- Extending Oracle Sales Cloud: How It Works

**Country Structure Import Objects: How They Work Together**

This topic describes the Country Structure import object. You use the Country Structure import object when you submit a file-based import activity to import your country structure information. This topic introduces the following:

- Target objects for the Country Structure import object
- Target import object attributes
- Reference guide files for target import object attributes

**Country Structure Target Import Objects**

The Country Structure import object contains one target import object. The target import object organizes the individual attributes of the different aspects of the geography structure. When updating an existing country structure, you must provide the parent reference information of the existing country structure. This reference information connects the imported geography structure to the existing one. Use the ImpGeoStructureLevel target import object to create and update country structure information.

**Target Import Object Attributes**

You must compare the attributes that you want to import with the target object attributes that are available and with their valid values. To evaluate your source data and Oracle Sales Cloud attributes for mapping and validation, you use a reference file. See the File Based Data Import for Oracle Sales Cloud guide available on the Oracle Sales Cloud Help Center (https://docs.oracle.com/cloud/latest/salescs_gs/docs.htm). In the File Based Data Imports chapter, see the topic for your import object of interest, which includes links to reference files for target import objects. A reference guide file includes attribute descriptions, default values, and validations performed by the import process. Review the validation for each attribute to determine whether there are functional prerequisites or prerequisite setup tasks that are required.
To import your source file data, you define a mapping between your source file data and the combination of the target object and target object attribute. You can predefine and manage import mappings using the Manage File Import Mappings task, or you can define the mapping when you define the import activity using the Manage File Import Activities task. Both tasks are available in the Setup and Maintenance work area.

Note: If any of the attributes you want to import does not have an equivalent target object attribute, then review the Application Composer extensibility features for country structures.

Reference Files for Target Import Object Attributes

To access reference files for this object's target import objects, see the File Based Data Import for Oracle Sales Cloud guide available on the Oracle Sales Cloud Help Center (https://docs.oracle.com/cloud/latest/salescs_gs/docs.htm). In the File Based Data Imports chapter, see the topic for your import object of interest, which includes links to reference files for target import objects.

For detailed information on importing geographies using file-based import, refer to Document No. 1481758.1, Importing Master Reference Geography Data, on the Oracle Support site.

The following table lists the reference files that are available by target import object.

<table>
<thead>
<tr>
<th>Target Import Object</th>
<th>Description</th>
<th>Reference Guide File Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>ImpGeoStructureLevel</td>
<td>Information that specifies a country’s geography structure.</td>
<td>HZ_IMP_GEO_STRUCTURE_LEVELS_Reference</td>
</tr>
</tbody>
</table>

Related Topics

- File-Based Data Import: How It Works
- Getting Started with File-Based Import: Documentation Overview
- Importing Country Structures Using File-Based Import: Quick Start
- Extending Oracle Sales Cloud: How It Works

Importing and Exporting Territory Geography Zones: Explained

Territory geography zones are geographical boundaries that you can set up to replicate your organization's regions, such as a Pacific Northwest sales region. You can set up territory geography zones in one application instance, and then after the territory geography zones are defined you can export the territory zones and import them into another application instance.

To define your territory geography zones and then import your territory zones into another application instance, you must complete the following steps:

1. Import the master reference geography data into the application.
2. Define your territory geography zones using the Manage Territory Geographies task.
3. Export the territory geography zones.
4. Import the territory geography zones into another application instance.

Import the master reference geography data

Firstly, you need to import the master reference geography data. Master reference geography data consists of geography elements such as country, state, and city, and is required for any geographical information you store in the application,
such as address information used in customer and sales records. For more information, refer to the Geography Hierarchy: Explained topic listed in the related topics section. Master reference geography data can be imported into the application using the Manage File Import Activities task in Setup and Maintenance - refer to the Importing Master Reference Geography Data: Worked Example topic listed in the related topics section for more information.

**Define your territory geography zones**

Once the master reference geography data has been imported, you can then create your territory geography zones in the application using the Manage Territory Geographies task in Setup and Maintenance. For more information, refer to the Managing Territory Geographies: Worked Example topic listed in the related topics section.

**Export the territory geography zones**

Once you have completed importing the master reference geography data and defining your territory geography zone tasks, you can create a configuration package to export the territory zone data. For more information, refer to the Exporting Setup Data demo listed in the related topics section.

**Import the territory geography zones**

Once you have downloaded your configuration package for your territory geography zone setup, you can import the territory zones into another application instance. For more information, refer to the Importing Setup Data listed in the related topics section.

> **Note:** Ensure that you import your master reference geography data into the new application instance before you import the configuration package.

**Related Topics**

- Managing Territory Geographies: Worked Example

**Defining Address Cleansing: Explained**

Address cleansing validates, corrects, and standardizes address information that you enter in the application. Address cleansing, unlike geography validation, validates both the geography attributes and the address line attributes.

To use the address cleansing functionality, you need to have license for the customer data quality application, because the feature is delivered using data quality integration.

You can specify the real-time address cleansing level for each country by choosing either of these options:

- **None:** Specifies no real time address cleansing.
- **Optional:** Provides option to cleanse addresses.

Once you have enabled address cleansing for a country, a **Verify Address** icon appears at address entry points in the application. Click the icon to perform address cleansing and receive a corrected, standardized address. If the application does not find a matching address, then an alert message is displayed.
FAQs for Defining Geographies

When do I define address cleansing?
When address data entered into the application needs to conform to a particular format, in order to achieve consistency in the representation of addresses. For example, making sure that the incoming data is stored following the correct postal address format.

Why can't I update a geography structure by copying an existing country structure?
You can only update a geography structure by adding existing geography types, or by creating new geography types and then adding them to the geography structure. You can only copy an existing country structure when you are defining a new country structure.

Why can't I delete a level of the country geography structure?
If a geography exists for a country geography structure level then you cannot delete the level. For example, if a state geography has been created for the United States country geography structure, then the State level cannot be deleted in the country geography structure.

Can I add any geography to the geography hierarchy?
Yes. However, the geography type for the geography that you want to add must be already added to the country geography structure.

Can I edit a specific geography in the geography hierarchy?
Yes. In the Manage Geography Hierarchy page you can edit details such as the geography’s date range, primary and alternate names and codes, and parent geographies.

How can I add a geography that is the level below another geography in a geography hierarchy?
Select the geography that you want your geography to be created below, and then click the Create icon. This will allow you to create a geography for a geography type that is the level below the geography type you selected. The structure of the country’s geography types are defined in the Manage Geography Structure page.

Defining Legal Entities for Incentive Compensation

Legal Entities: Explained
A legal entity is a recognized party with rights and responsibilities given by legislation.
Legal entities have the following rights and responsibilities to:

- Own property
- Trade
- Repay debt
• Account for themselves to regulators, taxation authorities, and owners according to rules specified in the relevant legislation

Their rights and responsibilities may be enforced through the judicial system. Define a legal entity for each registered company or other entity recognized in law for which you want to record assets, liabilities, expenses and income, pay transaction taxes, or perform intercompany trading.

A legal entity has responsibility for elements of your enterprise for the following reasons:

• Facilitating local compliance
• Minimizing the enterprise’s tax liability
• Preparing for acquisitions or disposals of parts of the enterprise
• Isolating one area of the business from risks in another area. For example, your enterprise develops property and also leases properties. You could operate the property development business as a separate legal entity to limit risk to your leasing business.

The Role of Your Legal Entities

In configuring your enterprise structure in Oracle Fusion Applications, the contracting party on any transaction is always the legal entity. Individual legal entities:

• Own the assets of the enterprise
• Record sales and pay taxes on those sales
• Make purchases and incur expenses
• Perform other transactions

Legal entities must comply with the regulations of jurisdictions, in which they register. Europe now allows for companies to register in one member country and do business in all member countries, and the US allows for companies to register in one state and do business in all states. To support local reporting requirements, legal reporting units are created and registered.

You are required to publish specific and periodic disclosures of your legal entities’ operations based on different jurisdictions’ requirements. Certain annual or more frequent accounting reports are referred to as statutory or external reporting. These reports must be filed with specified national and regulatory authorities. For example, in the United States (US), your publicly owned entities (corporations) are required to file quarterly and annual reports, as well as other periodic reports, with the Securities and Exchange Commission (SEC), which enforces statutory reporting requirements for public corporations.

Individual entities privately held or held by public companies do not have to file separately. In other countries, your individual entities do have to file in their own name, as well as at the public group level. Disclosure requirements are diverse. For example, your local entities may have to file locally to comply with local regulations in a local currency, as well as being included in your enterprise's reporting requirements in different currency.

A legal entity can represent all or part of your enterprise’s management framework. For example, if you operate in a large country such as the United Kingdom or Germany, you might incorporate each division in the country as a separate legal entity. In a smaller country, for example Austria, you might use a single legal entity to host all of your business operations across divisions.

Defining Business Units for Incentive Compensation
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
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?
4 Common Applications Configuration: Defining Persons for Incentive Compensation

User and Role Synchronization: Explained

User accounts for users of Oracle Fusion Applications are maintained in your Lightweight Directory Access Protocol (LDAP) directory. The LDAP directory also holds information about roles provisioned to users.

During implementation, any existing information about users and their roles must be copied from the LDAP directory to the Oracle Fusion Applications tables. To copy this information, you use the task Run User and Roles Synchronization Process. This task calls the Retrieve Latest LDAP Changes process. You can perform the task Run User and Roles Synchronization Process from either an implementation project or the Setup and Maintenance work area.

Once the Oracle Fusion Applications tables are initialized with this information, it’s maintained automatically.

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
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 autopropositing 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.
How Incentive Compensation Uses Resource Roles

You can use resource roles to create provisioning mapping to automatically provision incentive compensation job roles.

Securing Incentive Compensation: Overview

Access to Incentive Compensation functionality and data is secured using role-based access control (RBAC). There are tasks that you must perform to implement these controls so that users have appropriate access to Incentive Compensation data and functions. Some of the tasks are performed only or mainly during implementation. Most, however, can be performed at any time and as new requirements emerge.

See the Oracle Sales Cloud Securing Incentive Compensation guide.
Common Applications Configuration: Defining Source Systems, Data Formats, and Party Usage

Defining Source Systems for Incentive Compensation

Source Systems: Explained

This topic explains source systems and how to set up a source system. You can set up source systems to enable users to identify the source of the data they are importing. You can specify whether the source system is a spoke system, such as a legacy system, or a purchased system, such as data from a third party provider. You can also specify what types of entities the source system contains. For example, you can specify that a source system will contain customer data.

You can configure the following for a source system:

- Source system code, name, and description
- Source system type
- Enable for Items, Trading Community Members, Order Orchestration and Planning, and Assets

Source System Code, Name, and Description

You can create a source system code to uniquely identify the source system. Source system codes are used by the application to create references between source IDs and the Oracle Sales Cloud database IDs.

> Note: Ensure you update the source system code before you create the source system.

Source System Type

You must set up a source system as either a spoke system or a purchased system.

Enable for Items, Trading Community Members, Order Orchestration and Planning, and Assets

You can select one or more of the following entity types to import from the source system into the Oracle Sales Cloud database:

- Items
- Trading Community Members
- Order Orchestration and Planning
- Assets
You must enable the correct entity types because each import UI filters source systems based on their entity type. For example, if you set up a source system for Trading Community Members, Items, and Assets, then the source system can be selected as a data source only in this UI and not in different UIs.

Source System Entities: Explained

Source system entities are entities that you can import using a specified source system, such as addresses and parties. When you import data from a source system, all the entities in the source system data are also imported. You can select multiple source references in the Manage Source System Entities task to allow multiple source system records to map to a single record.

FAQs for Defining Source Systems

What happens if I allow multiple source system references?
When you import data from a source system, you can merge multiple or duplicate source system records and create one record in the Oracle Sales Cloud. This is referred to as allowing multiple source system reference.

If you do not allow multiple source system references, then for every source system record, a duplicate record is created in Oracle Sales Cloud.

Defining Data Formats for Incentive Compensation

Data Formats and Setup Activities: How They Fit Together

Data Formats help you define address formats and name formats within your organization, and assign them to specific geographies. Oracle Sales Cloud uses these formats to capture and validate party name and address information.

You must set up geography data, in addition to the address formats, to use geography-based validations for addresses.

Managing Data Styles

You can define new styles for name and address to categorize a name and address style formats. A Data Style, such as Mailing Address or Concatenated Name, categorizes name and address style formats. Oracle Sales Cloud uses Data Styles to identify a particular manner or situation for which an entity is formatted. For example, you can customize the application to display only certain name and address styles in the user interface.

How Data Formats ensure Data Quality

You use Data Formats to ensure party address and party name data quality. The address formats are used to present the address elements in the country specific formatting, and help users during address entry. This also specifies the scope of address validation. Address formats are linked to the geographic data for address verification, at the data-import level. For example, when creating or editing an address for a party, selecting a country displays the address format for that country.
The use of Name formats ensures that name components are stored in a decomposed manner. You can use Name formats to construct name representations from components in a variety of different styles. You can also store phonetic names that are required for certain geographies.

Data Formats simplify the storage of party address and party name, by storing them as components. You can use formats to validate addresses and name data, after setting up address and name format for a geography.

Setup Formats: Explained

Data Formats determine how names and addresses are displayed in the Oracle Sales Cloud. There are two types of data formats.

- Address format: Address formats specify the layout of an address, such as the components in the address and their position in the layout. For example, an address format for US postal address can include address, city, state, and zip code in that order.
- Name format: Name formats specify how a name is displayed in the application, based on the usage, language, and country. A name format includes name elements, their position, and formatting. You can create a name style format for either an organization name or a person name.

Name and address formats vary depending on usage, country, and language. You can create name formats and address formats, customize them, and assign them to specific locales. This allows you to create data formats for various countries, languages, and usages.

Additionally, you can create variations of the formats, with each variation having its own layout. For example, an address format may have variations such as general address, rural address, and military address.

Creating an Address Style Format: Worked Example

This example shows how to create an address style format for a specified address style.

To create an address style format:

- Specify the address style format and address style
- Create the format variation layout
- Assign a locale

In this example, we will create an address style to format Canadian postal addresses.

**Creating the address style format name and specifying the address style**

To create an address style format and specify the address style:

1. Navigate to the Manage Address Formats task from the Setup and Maintenance work area.
2. On the Manage Address Formats page, click Create from the actions menu.
3. On the Create Address Style Format page, complete the fields in the Overview section, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>CA_POSTAL_ADDR</td>
</tr>
<tr>
<td>Name</td>
<td>Canadian Postal Address Format</td>
</tr>
</tbody>
</table>
Creating the format variation layout

To create a format variation layout:

1. In the Format section on the Create Address Style Format page, click on the Format Layout tab.
2. In the Format Variation section, select New from the Actions menu.
3. Enter a variation number in the Variation field.
4. In the Format Variation Layout section, select New from the Action menu.
5. Complete the fields as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Style</td>
<td>Postal Address</td>
</tr>
<tr>
<td>Default</td>
<td>No</td>
</tr>
</tbody>
</table>

4. Click **Save**.

6. Create another address line as shown in the table below:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line</td>
<td>2</td>
</tr>
<tr>
<td>Position</td>
<td>2</td>
</tr>
<tr>
<td>Prompt</td>
<td>City</td>
</tr>
<tr>
<td>Address Element</td>
<td>City</td>
</tr>
<tr>
<td>Required</td>
<td>Yes</td>
</tr>
<tr>
<td>Uppercase</td>
<td>Yes</td>
</tr>
</tbody>
</table>
7. Click **Expand** on the City address line, then enter the value **1** in **Blank Lines Before**.
8. You can create as many address lines as you require. Click **Expand** if you want to enter blank lines and delimiters before, or after, an address line. In this section you can also create an Attribute Transform Function to change a data value into a different value.

**Note:** While creating a new address style format, make sure that the transform function is present for each component as in predefined address style formats. The transform function may impact functionalities like translation.

### Assigning a locale

To assign an address style format to a locale:

1. In the Format section on the Create Address Style Format page, click on the **Locale Assignment** tab.
2. Select **New** from the Actions menu.
3. Select the country for the address style format. You can assign multiple countries to the format.
4. Click **Save and Close**.

### Creating a Name Style Format: Worked Example

In this example, we will create a name style format United States Concatenated Name Format, define its format variation layout, and assign United States to it.

To create a name style format:

1. On the Manage Name Formats page, click Create from the Actions menu. The Create Name Style Format page is displayed.
2. In the Overview region, complete the fields as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>CONCAT_NAME_US</td>
</tr>
<tr>
<td>Name</td>
<td>United States Concatenated Name Format</td>
</tr>
<tr>
<td>Name Style</td>
<td>Concatenated Name</td>
</tr>
<tr>
<td>Default Format for Style</td>
<td>No</td>
</tr>
</tbody>
</table>

3. In the Format Variation region, click **Add Row** from the Actions menu. A blank row is added to the Format Variation table.
4. Enter **1** in the Variation Rank field of the blank row.
5. In the Format Variation Layout region, click **Create** from the Actions menu. A blank row is added to the Format Variation Layout table.
6. Complete the fields as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line</td>
<td>1</td>
</tr>
</tbody>
</table>
You can create as many name parts as you require. Click Expand if you want to enter blank lines and delimiters before, or after, a name part. You can also create an Attribute Transform Function to change a data value into a different value.

7. Click **Create** from the Actions menu to create another variation layout as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line</td>
<td>2</td>
</tr>
<tr>
<td>Prompt</td>
<td>Person Last Name</td>
</tr>
<tr>
<td>Name Element</td>
<td>Last Name</td>
</tr>
<tr>
<td>Required</td>
<td>No</td>
</tr>
<tr>
<td>Uppercase</td>
<td>No</td>
</tr>
</tbody>
</table>

8. Click on the **Locale Assignment** tab.
9. Click **Create** from the Actions menu, and complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country</td>
<td>United States</td>
</tr>
<tr>
<td>Language</td>
<td>American English</td>
</tr>
</tbody>
</table>

10. Click **Save and Close**.
FAQs for Defining Data Formats for Incentive Compensation

How can I create an address style format layout?
Click **New** in the Manage Address Formats page and add address lines in the Format Variation Layout section. If you require more than one address style format layout, then you can create a format variation and add a different address format layout.

How can I create a variation of an Address Style Format?
You can create different variations of an address style format, with each variation having its own layout. For example, a country's postal address may have variations such as general postal address, rural address, and military address. When you create an address style format, the layout defined for the format is assigned as the default variation. Click **Add** in the Format Variation region of the Edit Address Style Format page, for the address style format, to add a variation of the Address style. For each address style format variation, you can enter a variation rank to define the priority of the variation.

How can I create a name style format layout?
Click **New** in the Manage Name Formats page and add line entries for each part of the full name in the Format Variation Layout section, within the Create Name Style Format page. If you require more than one name style format layout, then you can create a format variation and add a different name format layout.

How can I create another variation of a Name Style Format?
You can create different variations of a name style format, with each variation having its own layout. For example, different regions in a country may have different name style formats. Click **Add** in the Format Variation region in the Edit Name Style Format page, for the name style format, to add a variation of the name style. For each name style format variation, you can enter a variation rank to define the priority of the variation.

Defining Party Usage

Party Usage in Incentive Compensation
When participants are imported into incentive compensation the Incentive Compensation party usage is associated with the party records.

Party Usage: Explained
Party usages describe how a party is used by the implementing organization. For example, a person in the business community may be a consumer or contact. You can create rules to determine how a party usage can be associated with party.
You can define the following types of rules for a party usage:

- Assignment rules
- Exclusivity rules
- Incompatibility rules
- Transition rules
Assignment rules
Assignment rules define how the party usage can and cannot be assigned to parties. You can allow unconditional party usage assignment, enable the assignment to be created manually, or be updated by an administrator.

Alternatively, you can also restrict the manual assignment and update of a party usage, which means that the party usage can only be created or updated by a business event. For example, the Customer party usage is assigned to a party when you create an account for the party.

You can also specify whether the party usage assignment can be created or updated when a relationship is assigned to a party. For example, when a contact has a relationship with an organization the party usage Organization Contact is assigned to the contact.

Exclusivity rules
Exclusivity rules restrict party usage assignment, so that the party usage can be assigned to a party only during a specified time period. For example, you can set up an exclusivity rule that the party usage Manufacturer can be assigned to parties only between January 1 2011 and February 1 2011.

Incompatibility rules
Incompatibility rules specify which party usages can cannot be assigned concurrently to a party during a specific time period. For example, an incompatibility rule can specify that the party usage Sales Account usage cannot be assigned to a party with a Sales Prospect usage, during January 1 2011 and December 31 2030.

Transition rules
Transition rules specify which party usages can transition to the party usage you are creating or editing. Once a party transitions to the current party usage, the previous party usage is set with an end date. For example, when a party with the Prospective Partner party usage is assigned the Partner party usage, the Prospective Partner usage is set with an end date.

Party Usage Filter Rules: Explained
Party usage filter rule is a grouping of party usages and is used to search and filter parties in the user interface. In a party usage filter rule, you can specify the party usages to include and exclude in the rule. You can also specify if the party usage assignments should be active or inactive.

For example, an Eligible Customers filter rule can include the Sales Prospect party usage, Sales Account, Legal Entity, and Customer party usages. The Eligible Customers filter rule can then be used in the user interface to view only eligible customers from the list of parties.

Note: You must compile a new filter rule before you can use it in the user interface.

FAQs for Defining Party Usage

How can I compile a party usage filter rule?
In the Party Usage Filter Rule page click Actions in the header section, and then click Compile Filter Rule.
Approval Management: Highlights

Use approval management to define policies that apply to approval workflows. For example, to reflect your own corporate policies, you can specify levels of approval for expense reports over a particular amount and determine how the approvals are routed.

Approval management:
- Controls workflows for business objects such as expense reports.
- Enables you to define complex, multistage task routing rules.
- Integrates with the setup in Human Capital Management (HCM) to derive approvers based on the supervisory hierarchy.

To define approval management, use the Define Approval Management task list in the Setup and Maintenance work area. The task list includes setup tasks for managing workflow task configurations and approval groups.

Task Configuration

Manage rule sets and rules that control approval flows.
- To configure a predefined approval policy, select the predefined rule set and click the Edit Task icon.
- To disable a predefined rule set, select the Ignore participant check box for that rule set.
- To edit the rules within a predefined rule set, you can insert, update, or delete while in edit mode.
- You can configure a specific rule to automatically approve a task without sending it to any approver.
  - Modify the routing for that rule so that it is sent to the initiator (which means the requestor is the approver).
  - Set the Auto Action Enabled option to True.
  - Enter APPROVE in the Auto Action field.

Approval Groups

Each approval group includes a set of users that you configure to act on tasks in a certain pattern. Tasks can be defined to get routed to an approval group instead of an individual user.
- You can nest approval groups within approval groups.
- You have two options for defining the group:
  - Static: Select the specific users to include in the group.
  - Dynamic: Provide the logic to use to determine the users in the group.
Customization

You can also customize predefined approval workflows, for example to add post-approval activities or additional stages (not available for Oracle Cloud implementations).

- Refer to the Oracle Fusion Applications Extensibility Guide for Developers.

See: Customizing and Extending SOA Components

Approval Management Configuration Options for Incentive Compensation: Explained

The approval management extensions to the human workflow services of Oracle SOA Suite have the following default configuration options for Incentive Compensation.

<table>
<thead>
<tr>
<th>Configuration Option</th>
<th>Default Value</th>
<th>Effect of Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad hoc insertion of approvers</td>
<td>True</td>
<td>Allow ad hoc insertion of approvers in the approval list. Users who add approvers may also modify or remove the approvers that they add.</td>
</tr>
<tr>
<td>Allow delegate</td>
<td>True</td>
<td>Allow approvers to delegate their approval responsibilities to other users. One approver replaces another, but the approver list is otherwise unaltered.</td>
</tr>
<tr>
<td>Allow push back</td>
<td>True</td>
<td>An approver can push the transaction back to the previous approver, who then has a second opportunity to review the transaction.</td>
</tr>
<tr>
<td>Allow reassign</td>
<td>True</td>
<td>Any approver can reassign the approval to a different approver. The approval list is recalculated based on the new approver.</td>
</tr>
<tr>
<td>Allow request information</td>
<td>True</td>
<td>Approvers can request more information from another approver or the person who submitted the transaction.</td>
</tr>
<tr>
<td>Allow self-approval</td>
<td>False</td>
<td>The person who submits the transaction cannot approve it.</td>
</tr>
<tr>
<td>Allow withdraw</td>
<td>True</td>
<td>The requester or an administrator can withdraw a transaction while the approval process is incomplete.</td>
</tr>
</tbody>
</table>
## Incentive Compensation Participant Paysheets: How They Are Approved

The status for each participant paysheet in a payment batch determines the actionable and informational notifications that the payment approval process sends to incentive compensation managers and analysts.

<table>
<thead>
<tr>
<th>Configuration Option</th>
<th>Default Value</th>
<th>Effect of Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>On error notify</td>
<td>Incentive Compensation Application Administrator</td>
<td>An incentive compensation application administrator is notified automatically when an error occurs.</td>
</tr>
<tr>
<td>Period before task expires</td>
<td>None</td>
<td>Approval tasks do not expire.</td>
</tr>
<tr>
<td>Period before task escalates</td>
<td>None</td>
<td>Approval tasks are not escalated to other approvers.</td>
</tr>
<tr>
<td>Escalated approver</td>
<td>None</td>
<td>Approval tasks are not escalated to other approvers.</td>
</tr>
<tr>
<td>Repeated approver frequency</td>
<td>Once per approval</td>
<td>An approver receives one notification per transaction, even when the approver appears multiple times in the approver list.</td>
</tr>
<tr>
<td>Reevaluate approver list</td>
<td>True</td>
<td>The approver list is regenerated after every response.</td>
</tr>
<tr>
<td>Rejection outcome</td>
<td>Stop all</td>
<td>When an approver rejects a transaction, the approval process stops and the transaction is canceled.</td>
</tr>
</tbody>
</table>
The following figure shows the payment approval business process. During the Determine Incentive Payments business process, incentive compensation analysts create payment batches, which contain the participant paysheets. Paysheets can be automatically approved or routed for approval.

Settings That Affect Participant Paysheet Approval

The delivered NotificationForPaysheet approval task workflow works with the participant and analyst hierarchies to determine what notifications are sent, to whom, and at what point in the payment processing.

Use the Manage Task Configurations for Incentive Compensation in the Setup and Maintenance work area to edit the approval task. The flow provided uses the analyst hierarchy defined using the Manage Analyst Payment Approval Hierarchy task in the Participant Assignments work area. You can configure the approval flow to include the participant supervisory hierarchy. The participant hierarchy is derived by the application using the manager assigned to the participant when importing the employee resource, entering users, or assigning managers using HCM Cloud.

Parameters that you set using the Manage Parameters task in the Setup and Maintenance work area determine if you run payment approval processing. They also provide any minimum and maximum payment amounts that the approval process should approve automatically. The status of each participant paysheet determines what user actions are available and the actionable and information notifications to send.

How Participant Paysheets Are Approved

When the incentive compensation analyst first creates a payment batch, the payment process uses the associated pay group to create participant paysheets with the default status selected for the business unit parameters. If the parameter setting is Approved, or if the paysheet amount falls between or is equal to the minimum and maximum approval amounts, then the
process sets the paysheet status to Approved. Otherwise, the paysheet status remains Unpaid until the analyst reviews the paysheet, locks the paysheet, and submits the paysheet for approval.

The approval process is configured into steps. The step contains your approval policy for that step. The provided process includes a step to route the paysheet to compensation managers for approval. The paysheet approval task workflow can be configured by your application administrator to include additional steps and even exclude the compensation manager approval. For example, you can configure one step to get the participant manager and their manager's approval and another step to get approval from an auditing group. The steps can be modeled as parallel to one another or sequential. The conditional rules provide the ability to use the attributes of the paysheet and participant to define the conditions and related action. For example, you can define a rule that indicates paysheets over 5,000 must be routed to the participant's manager for approval.

For steps defined for parallel approval, you can enable voting or first responder wins. The workflow tracks the responses from the approvers. If you define a step where 50% of the approvers must approve, then the workflow tracks the responses from the approvers to determine the vote and outcome.

You can define approval groups and assign the group to a step. Approval groups are typically used for your subject matter experts. Finally, the paysheet approval requester receives an informational notification with the final outcome.

Related Topics

- Incentive Compensation Payment Entities: How They Work Together

Customizing Paysheet Approvals

Customizing Paysheet Approvals: Overview

You can customize your paysheet approval processing when you need more than incentive compensation analyst and manager approval. Your application administrator can edit the approval flow and configure rules for determining your approvers. The approver can come from the participant's supervisor hierarchy, a group that you define, or a specific user. This feature still supports your governance requirements while giving you more flexibility and control over your paysheet approval processing.

You can configure your paysheet approval workflow to manage your approval processing for you. Each submitted paysheet is evaluated against your rules to determine the approval path required for that specific paysheet. Paysheets can qualify for automatic approval or require to be routed up several approver hierarchies. The list of approvers is derived and the notifications are routed based on your policy. Altogether, this enables strong paysheet governance without a lot of manual work.

Parallel and Sequential Routing

You can graphically design your approval policy into parallel and sequential steps. You can route the approval notifications based on rules. For example, you can define a rule that indicates paysheets over 5,000 must be routed to the participant’s manager for approval.

This also means that you can now include the participant’s supervisor hierarchy in the approval process. When using the participant’s supervisor hierarchy, you set traversal levels. For example, to traverse two levels means that the participant’s manager and their manager’s manager are required approvers.
Approval Groups

You can define an approval group. Approval groups are typically used for your subject matter experts. For example, you can define an approval group of auditors that specialize in reviewing incentive compensation items. You can then define a rule that indicates all paysheets over a maximum amount be routed to the group of auditors for review.

Voting

For steps defined for parallel approval, you can enable voting. For example, you define a step where at least 50% of the approvers must approve. The workflow tracks the responses from the approvers to determine the vote and outcome.

Paysheet Approval Workflows: Examples

Paysheets route to the compensation analyst and the participant’s manager for approval. You can modify this workflow to use rules and other approvers including groups.

Groups and Voting

Create a group of auditors. All paysheets over a certain amount go to the auditors who vote to approve. When the specified percentage of auditors votes yes, the group has approved the paysheet.

Automatic Approval

Any paysheet with a total amount lower than a number specified in a rule is automatically approved. Any paysheet over the amount is routed for approval and notifications sent to specified approvers.

Supervisor Hierarchy

A paysheet above a specified amount is sent to the participant’s manager and then to the next higher manager for approval.

Customizing the Approval Workflow for Compensation Participant Paysheets: Procedure

When your paysheet approval processing require more than manager approval, your administrator can edit the approval flow. He can configure rules for determining your approvers. This feature still supports your governance requirements while giving you more flexibility and control over your paysheet approval processing.

To modify the workflow:

1. Navigate to Setup and Maintenance.
2. Search for and open the Manage Task Configuration for Incentive Compensation task.
3. In the Tasks to be Configured page, select the NotificationforPaysheet task.
4. Click Edit.
5. Go to the Assignees tab.

The ready to use configuration includes two enabled service oriented architecture (SOA) participants in the paysheet approval stage. The first SOA participant represents the current paysheet approval flow using the analyst-to-compensation manager hierarchy defined using the Participant Assignment work area. The second SOA participant sends a notification to the requesting analyst.
6. Select the inactive SOA label participant to enable and edit an additional parallel approval flow.

7. A placeholder rule is provided. Click Edit to create your own rules. Delete the placeholder rule.

**Note:** You can define a rule which routes the paysheet to an approval group. You define approval groups using the Setup and Maintenance, Manage Approval Groups for Incentive Compensation task.

8. For numeric values, you must convert them from strings back to values. To do so, use Double.valueOf followed by the value itself or field name in parentheses. For example, to include the number 1000 in a rule, enter Double.valueOf("1000").

9. When the rule result is true, you can, for example, add supervisory approvals for the then statement.

10. Click Validate and make sure your rules have no errors.

11. Click Go back to Assignees.

12. In the Assignees page, click Advanced.

13. To enable the SOA participant, deselect the Ignore Participant indicator.

---

**Adding Supervisory Hierarchy Approvers**

To add supervisory approvers:

1. For a rule that is true, go to the THEN region.

2. Set the number of levels in the participant’s supervisory hierarchy required to approve.

3. Click the icon next to Starting Participant.

4. Select the Manager option.

5. Click the icon next to Reference User.

6. Expand NotificationForPaysheetPayloadType.

7. Expand PaysheetdetailInfo.

8. Select participantUserName.

9. Click the icon next to Top Participant.

10. Select Get User.

11. In the Reference User field, type the topmost manager’s sign-in user name in quotes.

12. Click OK.
7 Defining Help Configuration

Setting Up Help: Overview

Applications Help works without you having to set anything up. You can do the optional setup, mainly if you want to customize help. Select the help features you want, perform tasks in the Define Help Configuration task list, and customize help.

Help Feature Choices

In the Setup and Maintenance work area, select help feature choices on the Features page when you configure your offerings. Feature choices determine:

- What's available in Applications Help
- What you can configure to set up help

The first feature choice for help is Local Installation of Help, and you must leave it selected. Other feature choices are:

- Access to Internet-Based Help Features
- Help Customization
- Custom Help Security

Define Help Configuration Task List

In the Setup and Maintenance work area, use these tasks in the Define Help Configuration task list to configure Applications Help for all users:

- Set Help Options:
  - Determine if certain features of Applications Help are available to users.
  - Control how aspects of Applications Help work.
- Assign Help Text Administration Duty: Contact your security administrator to determine who can customize help.
- Manage Help Security Groups: Set up security to limit access to certain help files.

Help Customization

After you configure help, you can review the predefined help and see if you want to add or customize any content. You can also customize help text that appears on the page, for example hints.

Related Topics

- Features: Explained
Setting Help Options

Setting Up Access to Web Sites from Applications Help: Procedure

You can determine the Web sites that users can access from Applications Help.

Setting Up Access to External Web Sites

Follow these steps:

1. In the Setup and Maintenance work area, open the Features page for your offering.
2. Leave the Location Installation of Help feature choice selected.
3. Select the Access to Internet-Based Help Features feature choice to allow access to Web sites from Applications Help. For example, some help files link to guides on the Oracle Help Center; this access is necessary for those links to work.
4. Select other feature choices as needed, and click Done.
5. Open the Set Help Options task.
6. In the Web Sites Available from Help Site section, select the sites to link to from the Navigator menu in Applications Help.
7. Save your work.

Setting Up Help Customization: Procedure

Users with the appropriate roles can customize predefined help or add their own files to help. To enable and set up help customization, do the following steps in the Setup and Maintenance work area, in the specified order.

Selecting Feature Choices

Perform these steps:

1. On the Features page for your offering, leave the Local Installation of Help feature choice selected.
2. Select the Help Customization feature choice.
3. Select the Custom Help Security feature choice if you want certain help files to be available only to a restricted set of users.
   
   **Caution:** Don’t select this feature choice if you don’t have this requirement, because the feature can affect performance.
4. Save your work.

Setting Help Options

Perform these steps:

1. Open the Set Help Options task in the Setup and Maintenance work area.
2. Optionally set options in these sections:

- **Help Site Customization:**
  - Determine how users can identify custom files in Applications Help.
  - Upload your own image to use as the background picture on the help home page. Select an image that’s white along the entire left border, like you see in the default image.

- **Oracle User Productivity Kit:** Add a link in the Navigator in Applications Help to your custom User Productivity Kit library.

- **Privacy Statement:** Add a link to your own privacy statement. To see this link, users click their user name in the global area of Applications Help.

3. Save your work.

**Providing Users Access to Help Customization**

Only users with job roles containing the ATK_CUSTOMIZE_HELP_TOPICS_PRIV privilege can customize help. The Assign Help Text Administration Duty task is a reminder for you to follow up with your security administrator. Make sure that users who want to customize help have the access to do so.

**Setting Up Help File Security**

If you selected the Custom Help Security feature choice, then go to the Manage Help Security Groups task and select job roles to include in help security groups.

When you later customize a help file, you can select a group to determine which job roles have access to the file.

**FAQs for Setting Help Options**

**Why can't I see certain sections on the Set Help Options page?**

What’s available on the page depends on the help feature choices that you select in the Setup and Maintenance work area. This table describes the correlation between feature choices and specific sections on the Set Help Options page.

<table>
<thead>
<tr>
<th>Help Feature Choice</th>
<th>Section on Set Help Options Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Installation of Help</td>
<td>None, but without selecting this feature choice, you can’t select the other help feature choices</td>
</tr>
<tr>
<td>Access to Internet-Based Help Features</td>
<td>Web Sites Available from Help Site</td>
</tr>
<tr>
<td>Help Customization</td>
<td>Help Site Customization</td>
</tr>
<tr>
<td></td>
<td>Oracle User Productivity Kit</td>
</tr>
<tr>
<td></td>
<td>Privacy Statement</td>
</tr>
<tr>
<td>Custom Help Security</td>
<td>None</td>
</tr>
</tbody>
</table>

**When do I link to the Oracle User Productivity Kit library from Applications Help?**

If you license Oracle User Productivity Kit and have custom User Productivity Kit content to share with your users. Topics that you add as custom help files in Applications Help are available only in the See It mode. However, in the library, users
can see the same topic in other modes. If you have User Productivity Kit versions earlier than 3.6.1, then you can’t add User Productivity Kit topics as custom help. So the link to the library is the only way users can get custom User Productivity Kit content from Applications Help.

What’s the URL for my Oracle User Productivity Kit library?
The full path from the Web server where you’re hosting your Oracle User Productivity Kit content to the index.html file that opens the table of contents for the library. For example, http://<your domain>.com/MyContent/PlayerPackage/index.html.

In this example, you or your administrator published one player package that contains all the content to be linked to from Applications Help, including the index.html file, and placed the PlayerPackage folder in a folder called MyContent on the Web server.

FAQs for Assigning Help Text Administration Duty

Who can add and manage custom help?
Users with the Customize Help Topics (ATK_CUSTOMIZE_HELP_TOPICS_PRIV) privilege can customize:

- Help in Applications Help and help windows
- Pages in the Getting Started work area

This privilege is assigned by default to the administrators for product families. Your security administrator can define which users have job roles with this privilege.

Managing Help Security Groups

Creating Help Security Groups: Worked Example
This example shows how to create a help security group, which contains a set of job roles. You can later assign the help security group to particular help files so that only users with any of the included job roles have access to the help.

The following table summarizes key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>What type of users do you need to limit help access to?</td>
<td>Human resources (HR) specialists</td>
</tr>
<tr>
<td>Is there a specific time period for which this access is needed?</td>
<td>No, the help files should always be viewed only by the HR specialists</td>
</tr>
<tr>
<td>Where do you want this group to appear in the list of values for help security groups?</td>
<td>First</td>
</tr>
</tbody>
</table>

Define a help security group and assign a job role to the group.
Prerequisites

1. Open the Features page for your offerings in the Setup and Maintenance work area.
2. Make sure that the Location Installation of Help feature choice is selected.

Creating the Help Security Group

1. In the Setup and Maintenance work area, go to the Manage Help Security Groups task.
3. Complete the fields, as shown in this table. Leave the start and end dates blank.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help Security Group</td>
<td>HR</td>
</tr>
<tr>
<td>Meaning</td>
<td>HR Only</td>
</tr>
<tr>
<td>Description</td>
<td>Viewing by HR specialists only</td>
</tr>
<tr>
<td>Display Sequence</td>
<td>1</td>
</tr>
</tbody>
</table>

4. Click Save.
5. With your new help security group selected, go to the Associated Roles section and add a new row.
6. Select PER_HUMANRESOURCE_SPECIALIST as the role name.
7. Click Save and Close.

To assign your new help security group to help files, you must create or edit help using the Manage Custom Help page, not help windows.

Related Topics

- How can I restrict access to specific help files?
8 Common Applications Configuration: Defining Application Toolkit and Social Network Objects

Define Application Toolkit Configuration: Overview

Oracle Fusion Application Toolkit (ATK) provides many features that are available to users of all product families. These features include Applications Help, the Reports and Analytics pane, and the Watchlist. In the Setup and Maintenance work area, use the Define Application Toolkit Configuration task list to set up some of these components. Use the Define Help Configuration task list to set up Applications Help.

Note: The Define Application Toolkit Configuration task list is available in implementation projects only if the Application Toolkit Component Maintenance feature choice is selected.

Tasks

The Define Application Toolkit Configuration task list contains these tasks:

- **Map Reports to Work Areas**: Determine what’s available in the Reports and Analytics pane for specific work areas.
- **Set Watchlist Options**: Define settings that affect what’s displayed in the Watchlist and how often items are refreshed.
- **Manage Application Toolkit Administrator Profile Values**: Set profile options to affect how some Application Toolkit features work.

Related Topics

- Disabling and Enabling Watchlist Categories and Items: Points to Consider
- Setting Up the Mapping Service for Contextual Addresses: Points to Consider
- Setting Up the Worklist Region on My Dashboard: Points to Consider
- Setting Up Help: Overview

Mapping Reports to Work Areas

Setting Up the Reports and Analytics Pane: Procedure

You can find the Reports and Analytics pane in many work areas, and the analytics and reports you see in the pane depends on the work area. You can define what’s available for a specific work area, by mapping reports from the business intelligence
(BI) catalog to that work area. In this mapping context, reports refer to both analytics and reports. Your changes apply to all users who have access to the work area you’re mapping.

Mapping Reports from Your Work Area
To map reports to the work area that you’re in:

1. Click the Edit Settings icon in the Reports and Analytics pane.
   
   You see all the reports that are currently mapped to your work area.
2. Click Select and Add.
3. Find the report in the catalog and select it.
4. Click OK.
5. To remove any mapping, select the report and click Remove.
6. Save your work.

Mapping Reports to Any Work Area
To map reports to any work area that you have access to:

1. Go to the Setup and Maintenance work area and open the Map Reports to Work Areas task.
2. Select the application of the work area you want to map to.
3. Select the work area.
4. Click Search and see all the reports that are currently mapped to that work area.
5. Click Select and Add.
6. Find the report in the catalog and select it.
7. Click OK.
8. To remove any mapping, select the report and click Remove.

   Tip: Click Synchronize to remove all mappings to any reports that are no longer in the catalog. You synchronize all work areas, not just the one you’re mapping.
9. Save your work.

Related Topics

• Reports and Analytics Pane: Explained

Setting Reports Up for Scheduling in the Reports and Analytics Pane: Procedure

You can set up reports as scheduled processes, which means users can submit them from the Scheduled Processes and other work areas. If you want users to also submit these scheduled processes from the Reports and Analytics pane, then you must configure properties for the corresponding reports.

Enabling a Report for Scheduling
To enable scheduling in the Reports and Analytics pane:

1. Select the report in the business intelligence catalog and click Edit.
2. Click Properties.
3. On the General tab in the Properties dialog box, enter the following fields:
Related Topics

- Setting Reports Up to Run as Scheduled Processes: Points to Consider
- Accessing Report Components to Customize: Points to Consider

FAQs for Mapping Reports to Work Areas

Why can't I see reports when mapping reports to work areas for the Reports and Analytics pane?

Either no reports are currently mapped to the work area you select on the Map Reports to Work Areas page, or you don’t have access to the reports that are mapped.

Similarly, when you’re selecting a report to map, you can see only the reports that you have access to. Ask your administrator to either:

- Assign you roles that have access to the reports you want to map to work areas.
- Grant the Reports and Analytics Region Administration Duty to someone who already has access to those reports.

Why can't I see reports when I edit settings for the Reports and Analytics pane?

In the Edit Settings window, you might not see a currently mapped report because you don’t have access to it.

Similarly, when you’re selecting a report to map, you can see only the reports that you have access to. Ask your administrator to either:

- Assign you roles that have access to the reports you want to map to work areas.
- Grant the Reports and Analytics Region Administration Duty to someone who already has access to those reports.

Managing Oracle Social Network Objects
Managing Oracle Social Network Objects: Explained

Use the Manage Oracle Social Network Objects task for managing the Oracle Social Network Objects. The integration of Oracle Social Network with applications and business processes brings key attributes from the applications to share, socialize, and update information. This helps in making better business decisions based on additional information that you obtain and analyze within your social network environment.

Use the Manage Oracle Social Network Objects page to set up and define:

- The business objects and attributes to enable
- The enablement method for social network integration with Oracle Applications Cloud

To open the Manage Oracle Social Network Objects page, start in the Setup and Maintenance Overview page and search for the Manage Oracle Social Network Objects task.

Use Oracle Social Network to:

- Discuss projects and plans in public forums
- Maintain:
  - Membership groups
  - Activity feeds of the people you select
- Facilitate:
  - One-on-one Conversations
  - Reviews
  - Document sharing

**Note:** Oracle Social Network is currently available in Cloud implementations only.

An important aspect of managing Oracle Social Network objects is enabling business objects for integration.

Enabling Business Objects for Integration

A business object can't be shared within social network until a functional administrator or implementor:

- Accesses the Manage Oracle Social Network Objects page in Oracle Applications Cloud
- Enables the business object for social network integration

Enabling Social Networking on Objects: Critical Choices

You can determine whether information about a business object, such as benefit plans or sales accounts, displays in Oracle Social Network. If you enable an object for sharing, you allow users to collaborate on the object through social networking. You can choose whether all instances of an object are shared, or only at the user's discretion. You can also choose which attributes are shared, such as names, details, and who made the last update.

In addition to a wide range of predefined objects, you can share:

- Custom objects and attributes created in Application Composer
Use the Manage Oracle Social Network Objects task in the Setup and Maintenance work area.

After you click Enable Object, select one of the following enablement options:

- Manual
- Automatic
- No

Manual

If you select this option, which is recommended, you let users decide whether to share each instance of the object with the social network. Once shared, all updates to the enabled attributes of the instance appear on the social network. If the instance is deleted, that information is also shared.

Click Enable All to enable all objects for all applications. Enable All automatically applies the Manual option, which means that the user can choose whether to share an object instance.

Automatic

With this option, news about all instances of the object appears on the social network, including:

- Every newly created instance
- All subsequent updates to the enabled attributes
- Deletion of any instances

No

With this option, which is the default value, no news about the object appears on the social network.

Note: When you click Disable Object, the enabled setting of the selected business object is automatically changed to No.

After you enable a business object, you must enable one or more attributes of the object. Only the enabled attributes are shared. The Status column in the Business Objects table indicates which enabled business objects don’t yet have an enabled attribute. For these objects, only the following information appear on the social network:

- Internal bookkeeping information, when creating or updating an instance of the object.
- News that an instance is deleted.

Update Translations: Explained

The Update Translations process sends attribute labels and business object names to Oracle Social Network for use in the user interface.

In social network, the attribute or business object labels appear in the language of your locale. If you change the locale in social network, then the attribute or business object labels appear in the updated language. However, the data appears in the language in which it was originally sent to social network. If you have previously sent an instance of the business object to social network, then the instance data isn’t updated. Clicking Update Translations on the Manage Oracle Social Network Objects page sends translations for business objects with the enablement option as Manual or Automatic.
Synchronize Business Objects: Explained

Use **Synchronize** on the Manage Oracle Social Network Objects page to synchronize business objects. This resends the definitions of business objects having the enablement option as **Manual** or **Automatic** to Oracle Social Network.

Use the Synchronize button at the:

- **Business Objects table level**: To resend the definitions of a selected business object to social network. This button is enabled only when you select a row for a business object with the enablement option as **Manual** or **Automatic**.

- **Manage Oracle Social Network Objects page level**: To resend the definitions of all business objects with the enablement option as **Manual** or **Automatic** to social network.

**Note**: If you had modified any business object enabled for social network and not saved your changes, then on clicking **Synchronize**, a warning message appears. This message informs you that you have not saved your changes, and you can select one of the following options:

- **Save and Synchronize**: To save the modified business objects, and synchronize the unmodified business objects.
- **Synchronize**: To ignore any unsaved business objects, and only synchronize the unmodified business objects.
- **Cancel**: To cancel the synchronization task.

FAQs for Managing Oracle Social Network Objects

**What happens if I update translations?**

When you update translations, you send translations for business objects with the enablement option as **Manual** or **Automatic** to Oracle Social Network.

On updating translations, you also:

- Synchronize the newly translated text from Oracle Applications Cloud so that it can be used within social network. This means you can:
  - Install and enable a new language.
  - Take a language patch at any time.
- Send attribute labels and business object names to social network for use in its user interface.

**How can I update translations?**

Use **Update Translations** on the Manage Oracle Social Network Objects page for subsequent updates to labels and attributes.

Use the **Update Translations** button at the:

- **Business Objects table level**: To send translations for a selected business object to Oracle Social Network. This button is enabled only when you select a row for a business object with the enablement option as **Manual** or **Automatic**.
• **Manage Oracle Social Network Objects page level**: To send translations for all business objects with the enablement option as **Manual** or **Automatic** to social network.

**Note**: When you save the enablement of a business object to social network, it sends the translations as well. Hence, you need not click **Update Translations** after saving the enablement.

**When do I update translations?**

Run the **Update Translations** process only after you install a new language pack of Oracle Applications Cloud.

Updating translations synchronizes the newly translated text to Oracle Social Network for integration with Oracle Applications Cloud.

**Note**: When you save the enablement of a business object to social network, it sends the translations as well. Hence, you need not click **Update Translations** after saving the enablement.

**What happens if I synchronize business objects?**

When you synchronize business objects, you resend the definitions of business objects having the enablement option as **Manual** or **Automatic** to Oracle Social Network.

**When do I synchronize business objects?**

Run the Synchronize process after you use customization sets to import the setup from the Manage Oracle Social Network Objects page in another environment.

You can also run the process whenever you want to synchronize the settings of business objects with social network without making changes in the Manage Oracle Social Network Objects page.

**Related Topics**

• Using Customization Migration to Move Customizations: Points to Consider
9 Defining Applications Core Configuration

Lookups: Explained

Lookups are lists of values in applications. You define a list of values as a lookup type consisting of a set of lookup codes, each code’s translated meaning, and optionally a tag. End users see the list of translated meanings as the available values for an object.

Lookups provide a means of validation and lists of values where valid values appear on a list with no duplicate values. For example, an application might store the values Y and N in a column in a table, but when displaying those values in the user interface, Yes or No (or their translated equivalents) should be available for end users to select. For example, the two lookup codes Y and N are defined in the REQUIRED_INDICATOR lookup type.

In another example, a lookup type for marital status has lookup codes for users to specify married, single, or available legal partnerships.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Code</th>
<th>Meaning</th>
<th>Tag</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAR_STATUS</td>
<td>M</td>
<td>Married</td>
<td></td>
</tr>
<tr>
<td></td>
<td>S</td>
<td>Single</td>
<td></td>
</tr>
<tr>
<td></td>
<td>R</td>
<td>Registered Partner</td>
<td>+NL</td>
</tr>
<tr>
<td></td>
<td>DP</td>
<td>Domestic Partner</td>
<td>-FR, AU</td>
</tr>
</tbody>
</table>

In this case, tags are used for localizing the codes. All legislations list Married and Single. Only the Dutch legislation lists Registered Partner. And all legislations except France and Australia also list Domestic Partner.

When managing lookups, you need to understand the following.

- Using lookups in applications
- Customization levels
- Accessing lookups
- Enabling lookups
- The three kinds of lookups: standard, common, and set enabled

Using Lookups in Applications

Use lookups to provide validation or a list of values for a user input field in a user interface.

An example of a lookup used for validation is a flexfield segment using a table-validated value set with values from a lookup type. An example of a lookup in a list of values is a profile option’s available values from which users select one to set the profile option. Invoice Approval Status gives the option of including payables invoices of different approval statuses in a report. The lookup code values include All, so that users can report by all statuses: Approved, Resubmitted for approval, Pending or rejected, and Rejected.
Customization Level

The customization level of a lookup type determines whether the lookups in that lookup type can be edited. This applies data security to lookups.

Some lookup types are locked so no new codes and other changes can be added during implementation or later, as needed. Depending on the customization level of a lookup type, you may be able to change the codes or their meanings. Some lookups are designated as extensible, so new lookup codes can be created during implementation, but the meanings of predefined lookup codes cannot be modified. Some predefined lookup codes can be changed during implementation or later, as needed.

The customization levels are user, extensible, and system. The following table shows which lookup management tasks are allowed at each customization level.

<table>
<thead>
<tr>
<th>Allowed Task</th>
<th>User</th>
<th>Extensible</th>
<th>System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deleting a lookup type</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Inserting new codes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Updating start date, end date, and enabled fields</td>
<td>Yes</td>
<td>Yes, only if the code is not predefined data</td>
<td>No</td>
</tr>
<tr>
<td>Deleting codes</td>
<td>Yes</td>
<td>Yes, only if the code is not predefined data</td>
<td>No</td>
</tr>
<tr>
<td>Updating tags</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Updating module</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

Predefined data means LAST_UPDATED_BY = SEED_DATA_FROM_APPLICATION.

If a product depends on a lookup, the customization level must be system or extensible to prevent deletion.

Once the customization level is set for a lookup type, it can’t be modified. The customization level for lookup types created using the Define Lookups page is by default set at the User level.

Standard, Common, and Set-Enabled Lookups

The available kinds of lookups are as follows.

<table>
<thead>
<tr>
<th>Lookup</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>Lists the available codes and translated meanings</td>
</tr>
<tr>
<td>Set enabled</td>
<td>Additionally associates a reference data set with the lookup codes</td>
</tr>
<tr>
<td>Common</td>
<td>Legacy lookups</td>
</tr>
</tbody>
</table>
Standard lookups are the simplest form of lookup types consisting only of codes and their translated meaning. They differ from common lookups only in being defined in the standard lookup view.

Common lookups exist for reasons of backward compatibility and differ from standard lookups only in being defined in the common lookup view.

Set enabled lookup types store lookup codes that are enabled for reference data sharing. At runtime, a set-enabled lookup code is visible because the value of the determinant identifies a reference data set in which the lookup code is present.

Accessing Lookups
Standard, set-enabled, and common lookups are defined in the Standard, Set-enabled, and Common views, respectively. Applications development may define lookups in an application view to restrict the UI pages where they may appear.

In lookups management tasks, lookups may be associated with a module in the application taxonomy to provide criteria for narrowing a search or limiting the number of lookups accessed by a product specific task such as Manage Purchasing Lookups.

Enabling Lookups
A lookup type is reusable for attributes stored in multiple tables.

Enable lookups based on the following.

- Selecting an **Enabled** check box
- Specifying an enabled start date, end date, or both
- Specifying a reference data set determinant

If you make changes to a lookup, users must sign out and back in before the changes take effect. When defining a list of values for display rather than validation, limit the number of enabled lookup codes to a usable length.

For more information on the predefined lookups and lookup codes, open the Setup and Maintenance work area, and use the tasks in the Define Lookups task list.

Translating Lookups
You can translate the lookups that you defined to the preferred language(s) without changing the language session of the application. Use the translation option available on the lookup code table. By default, for each lookup, all the allowed language rows in the translator dialog box appear in the source language (the current session language). When you edit a particular language entry, you can modify the translated meaning and description to the language in which you want the lookup to appear. Once the updates are made, the end-users can view the lookup in the translated text.

**Note:** You can add the translation for only as many languages as are permitted by the administrator. The functionality to limit the number of languages displayed on the dialog box is controlled through the Translation Editor Languages profile option. It can be set at the SITE or USER level. If nothing is specified, all active languages are displayed.

Related Topics
- Modules in Application Taxonomy: Explained
What's the difference between a lookup type and a value set?

A lookup type consists of lookups that are static values in a list of values. Lookup code validation is a one to one match. A table-validated value set may consist of values that are validated through a SQL statement, which allows the list of values to be dynamic.

**Tip:** You can define a table-validated value set on any table, including the lookups table. Thus, you can change a lookup type into a table-validated value set that can be used in flexfields.

<table>
<thead>
<tr>
<th>Area of Difference</th>
<th>Lookup Type</th>
<th>Value Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>List of values</td>
<td>Static</td>
<td>Dynamic if the list is table-validated</td>
</tr>
<tr>
<td>Validation of values</td>
<td>One to one match of meaning to code included in a lookup view, or through the determinant of a reference data set</td>
<td>Validation by format or inclusion in a table</td>
</tr>
<tr>
<td>Format type of values</td>
<td>char</td>
<td>varchar2, number, and so on</td>
</tr>
<tr>
<td>Length of value</td>
<td>Text string up to 30 characters</td>
<td>Any type of variable length from 1 to 4000</td>
</tr>
<tr>
<td>Duplication of values</td>
<td>Never. Values are unique.</td>
<td>Duplicate values allowed</td>
</tr>
<tr>
<td>Management</td>
<td>Both administrators and end-users manage these, except system lookups or predefined lookups at the system customization level, which can't be modified.</td>
<td>Usually administrators maintain these, except some product flexfield codes, such as GL for Oracle Fusion General Ledger that the end-users maintain.</td>
</tr>
</tbody>
</table>

Both lookup types and value sets are used to create lists of values from which users select values.

A lookup type cannot use a value from a value set. However, value sets can use standard, common, or set-enabled lookups.

### Setting Profile Option Values: Procedure

Each profile option contains specific values that determine how it affects the application. You can add or modify the values for each profile option. Select or enter the value for one or more of the available levels (site, product, and user) so that each setting takes effect at the intended level.
Setting the Profile Value

1. In the Setup and Maintenance work area, search for and open the Manage Administrator Profile Values task.
2. Search for and select the profile option.
3. In the Profile Values section, click Add. A new row is added for you to specify the following conditions:
   - **Profile Level**: Specify the level at which the profile value is to be set. If the profile value applies to the entire site, select **Site**.
   - **Product Name**: If you select **Product** as the profile level, select a product and specify the associated profile value.
   - **User Name**: If you select **User** as the profile level, select the user name and specify the associated profile value.
   - **Profile Value**: Select or enter the value corresponding to the selected profile level.

   **Note**: For an existing entry, you can modify only the profile value.

4. Repeat step 3 to add more rows and set the profile values.
5. Click **Save and Close**.

   **Note**: Changes in the profile values take effect for a user on the next sign in.

Flexfield Components: Explained

A flexfield is made up of several data entities that store and render information pertaining to flexfield configuration. Flexfields are made up of the following components:

- Segments
- Value Sets
- Contexts
- Structures

Segments

A segment is a field within a flexfield and represents a single table column of your database. When configuring a flexfield, define the appearance and meaning of individual segments. Segments represent attributes of information. Segments can appear globally wherever the flexfield is implemented, or based on a structure or context. Each segment captures a single atomic value and represents an attribute of information.

The characteristics of a segment vary based on the type of flexfield in which it’s used.

- In key flexfields, a segment describes a characteristic of the entity. For example, a part number that contains details about the type, color, and size of an item.
- In a descriptive or extensible flexfield, a segment represents an information attribute on the application page. For example, details about a device containing components, some of which are global while the remaining are contextually dependent on the category of the device.
Value Sets

Users enter values into segments while using an application. A value set is a named group of values that validate the content of a flexfield segment. You configure a flexfield segment with a value set to enforce entries of only valid values for that segment.

The configuration involves the following tasks:

- Defining the values in a value set, including characteristics such as the length and format of the values.
- Specifying formatting rules or values from an application table or predefined list.

Multiple segments within a flexfield, or multiple flexfields, can share a single value set.

Contexts

Context-sensitive flexfield segments are available to an application based on a context value. You define contexts as part of configuring a flexfield. Users see global segments as well as any context-sensitive segments that apply to the selected context value.

In descriptive flexfields and extensible flexfields, you can reuse the context-sensitive segments that are based on the database columns, in multiple contexts.

Structures

Key flexfields have structures. Each key flexfield structure is a specific configuration of segments. Adding or removing segments, or rearranging their order, produces a different structure. You can reuse the segments that are based on the database columns, in multiple structures.

Related Topics

- Flexfields and Oracle Applications Cloud Architecture: How They Work Together
- Value Sets: Explained

Customizing Flexfields Using Page Composer: Explained

Using Page Composer, you can create customizations to flexfields that are specific to a page.

In Page Composer, to customize:

- Extensible flexfields, open the page in Source view, and look for a region that is bound to an EffContextsPageContainer task flow. This is the container for the extensible flexfield attributes and contexts. To view the flexfield code and identifying information, open the properties panel for the region. To customize any component within the region, select the desired tag and click Edit.
- Descriptive flexfields, open the page in Source view, and look for `<descriptiveFlexfield>` elements. Open the properties panel for the element to view the flexfield code and identifying information. Within the properties panel, you may customize properties for the global and context-sensitive segments or re-order the segments on the page.

Related Topics

- Flexfields at Run Time: Explained
Flexfield Management

Flexfield Segment Properties: Explained

Independent of the value set assigned to a segment, segments may have properties that affect how they are displayed and how they function.

The following aspects are important in understanding:

- Display properties
- Properties related to segment values
- Properties related to search
- Range validation segments
- Rule validation of segment values
- Naming conventions

Display Properties

The following table summarizes display properties.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enabled</td>
<td>Whether the segment can be used.</td>
</tr>
<tr>
<td>Sequence</td>
<td>The order the segment appears in relation to the other configured segments.</td>
</tr>
<tr>
<td>Prompt</td>
<td>The string to be used for the segment’s label in the user interface.</td>
</tr>
<tr>
<td>Display type</td>
<td>The type of field in which to display the segment.</td>
</tr>
<tr>
<td>Selected and deselected values</td>
<td>If the display type is check box, the actual values to save. For example, Y and N or 0 and 1.</td>
</tr>
<tr>
<td>Display size</td>
<td>The character width of the field.</td>
</tr>
<tr>
<td>Display height</td>
<td>The height of the field as measured in visible number of lines when the display type is a text area.</td>
</tr>
<tr>
<td>Read only</td>
<td>Whether the field should display as read-only, not editable text.</td>
</tr>
<tr>
<td>Description help text</td>
<td>The field-level description help text to display for the field. Use description help text to display a field-level description that expands on or clarifies the prompt provided for the field.</td>
</tr>
<tr>
<td>Instruction help text</td>
<td>The field-level instruction help text to display for the field.</td>
</tr>
</tbody>
</table>

If description help text is specified, a Help icon button is displayed next to the field in the run time application. The description help text is displayed when the user hovers over the Help icon button.
Properties Related to Search
Extensible flexfield segments can be marked as selectively required in search using the indexed property. The indexed property requires users to enter a value before conducting a search on the attribute represented by the indexed segment. A database administrator must create an index on the segment column representing the indexed attribute.

Range Validation of Segments
Range validation enables you to enforce an arithmetic inequality between two segments of a flexfield. For example, a product must be ordered before it can be shipped. Therefore, the order date must be on or before the ship date. Also, the order date segment value must be less than or equal to the ship date segment value. You can use range validation to ensure this relationship.

The conditions for range validation are as follows:

- Segments must be configured for range validation in pairs, one with the low value and one with the high value.
- Both segments must be of the same data type.
- Both segments must be parts of the same structure in a key flexfield or parts of the same context in a descriptive flexfield or extensible flexfield.
- The low value segment must have a sequence number that is lesser than that of the high value segment.
- Non-range validated segments can exist between a range validated pair, but range validated pairs cannot overlap or be nested.

You can configure as many range validated pairs as you want within the same flexfield. Your application automatically detects and applies range validation to the segment pairs that you define, in sequence order. It must detect a low value segment first, and the next range validated segment that it detects must be a high value segment. These two segments are assumed to be a matching pair. The low value and the high value can be equal.

Rule Validation of Segment Values
Validation rules on descriptive and extensible flexfield segments determine how an attribute is validated. The value entered for an attribute on a business object may must match a specified format or be restricted to a list of values. Use a value set to specify the validation rules.

Value set validation is required for global segments and context-sensitive segments, and optional for context segments. In the case of context segments, the application may validate a value instead of the value set validating the value against the context segment. However, the application entered values must match exactly the valid context segment values. If the context segment values are a superset or subset of the input values, you must assign a table-validated value set or independent value set to validate context values.

When you configure a descriptive flexfield segment, you can specify a constant to use for setting the initial value. The initial value can be an available parameter. For every planned segment, list the constant value or parameter, if any, to use for the initial value.

Naming Conventions
Enter a unique code, name, and description for the segment. These properties are for internal use and not displayed to end users. You can’t change the code after the segment is created.
The Application Programming Interface (API) name is a name for the segment that isn’t exposed to users. The API name is used to identify the segment in various integration points including web services, rules, and business intelligence. Use alphanumeric characters only with a leading character. For example, enter a code consisting of the characters A-Z, a-z, 0-9 with a non-numeric leading character. The use of spaces, underscores, multi-byte characters, and leading numeric characters isn’t permitted. You can’t change the API name after the segment has been created.

Related Topics
- Managing Extensible Flexfields: Points to Consider

Flexfields Segments: How They Are Rendered
Flexfield segments appear on pages as attributes of business objects.

Settings That Affect Flexfield Segment Display
When you configure flexfield segments, the value you enter for the segment’s display type determines how the segment appears at run time.

How Display Type Values Appear
The following figures represent how the display types render on the UI at run time. Each display type screenshot is assigned an alphabet that maps to the display type and its description in the table.
This figure contains the representation of a check box, a drop-down list, a list of values, and a search box.

A. Check Box

- Display next notification after my response

B. Drop-down List

- Sales Region
  - West
  - Northwest
  - Southwest
  - North
  - Central
  - South
  - Northeast
  - East
  - Southeast

C. List of Values

- My Airport Codes
  - HNL Honolulu, HI
  - SAN San Diego, CA
  - SFO San Francisco, CA
  - SJC San Jose, CA
  - LAX Los Angeles, CA
  - NYC New York, NY - All airports
  - BOS Boston, MA
  - PDX Portland, OR
  - Search...

D. Pop-up List of Values

- Location

This figure contains the representation of a radio button group, text area, text box, date and time, and rich text editor.
This figure contains the representation of a color palette and a static URL field.
The following table describes each display type.

<table>
<thead>
<tr>
<th>Display Type</th>
<th>Figure Reference</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Box</td>
<td>A</td>
<td>The field appears as a check box. If the user selects the check box, the checked value is used. Otherwise, the deselected value is used.</td>
</tr>
<tr>
<td>List</td>
<td>B</td>
<td>The field appears as a list of values available to the user for selection.</td>
</tr>
<tr>
<td>List of Values</td>
<td>C</td>
<td>The field appears as a list of values available to the user for selection. The user can also click Search to find more values.</td>
</tr>
<tr>
<td>Text Field with Search</td>
<td>D</td>
<td>The field appears as a text field with a Search icon button. The users can type a value in the text field or they can click the Search icon button to open another window for searching.</td>
</tr>
<tr>
<td>Display Type</td>
<td>Figure Reference</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Radio Button Group</td>
<td>E</td>
<td>The field appears as a set of radio buttons. The user can select one button. Selecting a button de-selects any previously selected button in the set.</td>
</tr>
<tr>
<td>Text Area</td>
<td>F</td>
<td>The field appears as a text area in which the user can type multiple lines of text. The display width and height specify the visible width and number of lines in the text area, respectively.</td>
</tr>
<tr>
<td>Text Box</td>
<td>G</td>
<td>The field appears as a text field in which the user can type a single line of text. The display width controls the width of the text box.</td>
</tr>
<tr>
<td>Date Time</td>
<td>H</td>
<td>The field enables the user to enter a date if the data type is Date, or a date and time if the data type is Date Time. The user can select the date in a calendar. If the data type is Date Time, the field also displays fields for specifying the hour, minutes, seconds, AM or PM, and time zone.</td>
</tr>
<tr>
<td>Rich Text Editor</td>
<td>I</td>
<td>The field appears as a text area in which the user can enter and edit multiple lines of formatted text. The display width and height specify the visible width and number of lines in the rich text editor, respectively.</td>
</tr>
<tr>
<td>Color</td>
<td>J</td>
<td>The field displays a color palette for the user to select a color at run time and assign it to the segment. During setup, this display type appears in the list for selection only if:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• You are working on an extensible flexfield segment.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The value set for the segment is set to ORA_FND_COLOR_#RRGGBB.</td>
</tr>
<tr>
<td>Static URL</td>
<td>K</td>
<td>The field appears as a text field in which users can enter a fixed URL that opens the web page when clicked.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> The length of the URL must not exceed 255 characters.</td>
</tr>
<tr>
<td>Hidden</td>
<td></td>
<td>The field isn’t displayed.</td>
</tr>
</tbody>
</table>
Flexfields and Value Sets: How They Work Together

Value sets are specific to your enterprise. When gathering information using flexfields, your enterprise’s value sets validate the values that your users enter based on how you defined the value set.

You can assign a value set to any number of flexfield segments in the same or different flexfields. Value set usage information indicates which flexfields use the value set.

The following aspects are important in understanding how flexfields and value sets work together:

- Defining value sets
- Shared value sets
- Deployment

**Defining Value Sets**

As a key flexfield guideline, define value sets before configuring the flexfield, because you assign value sets to each segment as you configure a flexfield. With descriptive and extensible flexfields, you can define value sets when adding or editing a segment.

> **Note:** Ensure that changes to a shared value set are compatible with all flexfield segments that use the value set.

**Shared Value Sets**

When you change a value in a shared value set, the change affects the value set for all flexfields that use that value set. The advantage of a shared value set is that a single change propagates to all usages. The drawback is that the change shared across usages may not be appropriate in every case.

**Value Set Values**

To configure custom attributes to be captured on the value set values screen in the Manage Value Sets task, configure the Value Set Values descriptive flexfield. The object’s code is FND_VS_VALUES_B. This flexfield expects the context code to correspond to the value set code. For each value set, you can define a context whose code is the value set code, and whose context-sensitive segments are shown for the values of that value set. By default, the context segment is hidden since it maps to the value set code and is not expected to be changed.

You can also define global segments that are shown for all value sets. However, this would be quite unusual since it would mean that you want to capture that attribute for all values for all value sets.

**Deployment**

When you deploy a flexfield, the value sets assigned to the segments of the flexfield provide users with the valid values for the attributes represented by the segments.

**Related Topics**

- Flexfield Deployment: Explained
- Flexfields and Oracle Applications Cloud Architecture: How They Work Together
- Defining Value Sets: Critical Choices
Defaulting and Deriving Segment Values: Explained

To populate a flexfield segment with a default value when a row is created, specify a default type of constant or parameter and a default value.

To synchronize a segment’s value with another field’s value whenever it changes, specify the derivation value to be the flexfield parameter from which to derive the attribute’s value. Whenever the parameter value changes, the attribute’s value is changed to match. If you derive an attribute from a parameter, consider making the attribute read-only, as values entered by users are lost whenever the parameter value changes.

When defaulting or deriving a default value from a parameter, only those attributes designated by development as parameters are available to be chosen.

Different combinations of making the segments read only or editable in combination with the default or derivation value or both, have different effects.

Initial run time behavior corresponds to the row for the attribute value being created in the entity table. If the default value is read only, it cannot subsequently be changed through the user interface. If the default value isn’t read only, users can modify it. However, if the segment value is a derived value, a user-modified segment value is overwritten when the derivation value changes.

<table>
<thead>
<tr>
<th>Default Type</th>
<th>Default value specified?</th>
<th>Derivation value specified?</th>
<th>Initial run time behavior</th>
<th>Run time behavior after parameter changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>No</td>
<td>Yes</td>
<td>No initial segment value</td>
<td>The changed parameter derivation value updates segment value</td>
</tr>
<tr>
<td>Constant</td>
<td>Yes</td>
<td>No</td>
<td>Default segment value</td>
<td>N/A</td>
</tr>
<tr>
<td>Constant</td>
<td>Yes</td>
<td>Yes</td>
<td>Default segment value</td>
<td>The changed parameter derivation value updates segment value</td>
</tr>
<tr>
<td>Parameter</td>
<td>Yes</td>
<td>No</td>
<td>The default segment value is the parameter's default value</td>
<td>N/A</td>
</tr>
<tr>
<td>Parameter</td>
<td>Yes</td>
<td>Yes, and same as default value</td>
<td>The default segment value is the parameter's default and derivation value</td>
<td>The changed parameter derivation value updates segment value</td>
</tr>
<tr>
<td>Parameter</td>
<td>Yes</td>
<td>Yes, and different from default value</td>
<td>The default segment value is the parameter's default value</td>
<td>The changed parameter default value doesn't update segment value. Only the changed derivation value updates the segment value</td>
</tr>
</tbody>
</table>
Why did my flexfield changes not appear in the run time UI?

The ADF business components or artifacts of a flexfield, which are generated into an Oracle Metadata Services (MDS) Repository when the flexfield is deployed, are cached within a user session. You must sign out and sign back in again to view flexfield definition changes reflected in the run time application user interface page.

Related Topics

- Flexfield Deployment Status: How It Is Calculated

How can I enable flexfield segments for Oracle Social Network Cloud Service?

When you manage Oracle Social Network Objects during setup and maintenance, search for the business object that includes descriptive flexfields. Select the attributes that are defined as flexfield segments and enable them.

Managing Value Sets

Planning Value Sets: Points to Consider

The value sets you create and configure depend on the valid values on the business object attributes that will use the value set. When creating value sets, you first give the value set a name and description, and then define the valid values of the set.

The following aspects are important in planning value sets:

- List of values
- Plain text input
- Value ranges
- Value format specification
- Security

List of Values

You can use one of the following types of lists to specify the valid values for a segment:

- Table column
- Custom list. Also include a sub list.
- Dependent custom list

If the valid values exist in a table column, use a table value set to specify the list of values. To limit the valid values to a subset of the values in the table, use a SQL WHERE clause. Table value sets also provide some advanced features, such as enabling validation depending on other segments in the same structure.

Use an independent value set to specify a custom set of valid values. For example, you can use an independent value set of Mon, Tue, Wed, and so forth to validate the day of the week. You can also specify a subset of an existing independent
value set as the valid values for a segment. For example, if you have an independent value set for the days of the week, then a weekend subset can be composed of entries for Saturday and Sunday.

Use a dependent value set when the available values in the list and the meaning of a given value depend on which independent value was selected for a previously selected segment value. For example, the valid holidays depend on which country you are in. A dependent value set is a collection of value subsets, with one subset for each value in a corresponding independent value set.

For lists of values type value sets, you can additionally limit the valid values that an end user can select or enter by specifying format, minimum value, and maximum value. For list of values type value sets, you can optionally implement value set data security. If the Oracle Fusion applications are running in different locales, you might need to provide different translations for the values and descriptions.

Plain Text Input
Use a format-only value set when you want to allow end users to enter any value, as long as that value conforms to formatting rules. For example, if you specify a maximum length of 3 and numeric-only, then end users can enter 456, but not 4567 or 45A. You can also specify the minimum and maximum values, whether to right-justify, and whether to zero-fill. With a format-only value set, no other types of validation are applied.

Value Ranges
You can use either a format-only, independent, or dependent value set to specify a range of values. For example, you might create a format-only value set with Number as the format type where the end user can enter only the values between 0 and 100. Or, you might create a format-only value set with Date as the format type where the end user can enter only dates for a specific year, such as a range of 01-JAN-93 to 31-DEC-93. Because the minimum and maximum values enforce these limits, you need not define a value set that contains each of these individual numbers or dates.

Value Format
Flexfield segments commonly require some kind of format specification, regardless of validation type. Before creating a value set, consider how you will specify the required format.

The following table shows options for validation type and value data type.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value data type</td>
<td>Character, Number, Date, Date Time.</td>
</tr>
<tr>
<td>Value subtype</td>
<td>Text, Translated text, Numeric digits only, Time (20:08), Time (20:08:08).</td>
</tr>
<tr>
<td></td>
<td>An additional data type specification for the Character data type for the</td>
</tr>
<tr>
<td></td>
<td>Dependent, Independent, and Format validation types.</td>
</tr>
<tr>
<td>Maximum length</td>
<td>Maximum number of characters or digits for Character data type.</td>
</tr>
<tr>
<td>Precision</td>
<td>Maximum number of digits the user can enter.</td>
</tr>
<tr>
<td>Scale</td>
<td>Maximum number of digits that can follow the decimal point.</td>
</tr>
<tr>
<td>Uppercase only</td>
<td>Lowercase characters automatically changed to uppercase.</td>
</tr>
<tr>
<td>Zero fill</td>
<td>Automatic right-justification and zero-filling of entered numbers (affects</td>
</tr>
<tr>
<td></td>
<td>values that include only the digits 0-9).</td>
</tr>
</tbody>
</table>
## Note

You cannot change the text value data type to a translated text value subtype after creating a value set. If there is any chance you may need to translate displayed values into other languages, choose Translated text. Selecting the Translated text subtype doesn’t require you to provide translated values.

### Value Sets for Context Segments

You can use only table and independent value sets to validate context values. The data type must be character and the maximum length of the values being stored must not be larger than the context’s column length. If you use a table value set, the value set cannot reference flexfield segments in the value set’s WHERE clause other than the flexfield segment to which the value set is assigned.

### Security

When enabling security on a value set, the data security resource name is an existing value set or one that you want to create. The name typically matches the code value for the value set. You cannot edit the data security resource name after you save your changes.

### Related Topics

- Value Sets: Explained
- Defining Value Sets: Critical Choices

### Table-Validated Value Sets and Bind Variables: Points to Consider

After you assign a value set to a flexfield, you can use bind variables in the WHERE clause.

The following bind variables refer to flexfield elements:

- `:{SEGMENT.<segment_code>}`
- `:{CONTEXT.<context_code>;SEGMENT.<segment_code>}`
- `:{VALUESET.<value_set_code>}`
- `:{FLEXFIELD.<internal_code>}`
- `:{PARAMETER.<parameter_code>}`

#### Segment Code

`:{SEGMENT.<segment_code>}`

This bind variable refers to the ID or value of a segment where `<segment_code>` identifies the segment. Where referring to the ID, the value set is ID-validated. Where referring to the value, the value set isn’t ID-validated. The data type of the bind value is the same as the data type of the segment’s column.

For both descriptive and extensible flexfields, the segment must be in the same context as the source segment. The source segment contains the WHERE clause. For descriptive flexfields, if the segment is global, then the source segment must be global.

The segment must have a sequence number that is less than the sequence number of the target segment with this bind variable. A matching segment must exist in the current flexfield context.
This bind variable is useful when the set of valid values depends on the value in another segment. For example, the values to select from a CITIES table might depend upon the selected country. If SEGMENT1 contains the country value, then the WHERE clause for the CITIES table might be `<country_code> = :{SEGMENT.SEGMENT1}`.

**Context Code**

`:({CONTEXT.<context_code>;SEGMENT.<segment_code>})`

This bind variable, which is valid only for extensible flexfields, refers to the ID (if the value set is ID-validated) or value (if not ID-validated) of a segment that is in a different context than the target segment (the segment with the WHERE clause).

- The `<context_code>` identifies the context and must be in the same category or in an ancestor category. It cannot be a multiple-row context.
- The `<segment_code>` identifies the segment. The data type of the bind value is the same as the data type of the segment's column.

**Note:** The target segment should appear in the UI after the source segment to ensure the source segment has a value. If the target segment's context is a single-row context, the source and target segments must be on separate pages and the target page must follow the source page.

The framework of extensible flexfields doesn't perform any additional validation related to mismatched values for segments defined with cross context bind parameters. Administrators must populate the correct pair of segment values.

This bind variable is useful when the set of valid values depends on the value of a segment in another context. For example, the values to select from a CERTIFICATION table for a segment in the Compliance and Certification context might depend on the value of the country segment in the Manufacturing context.

**Value Set Code**

`:({VALUESET.<value_set_code>})`

This bind variable refers to the ID (if the value set is ID-validated) or value (if not ID-validated) of the segment that is assigned to the value set that is identified by the `<value_set_code>`. The data type of the bind value is the same as the data type of the segment's column.

The segment must have a sequence number that is less than the sequence number of the segment with this bind variable. If more than one segment is assigned to the value set, the closest prior matching segment will be used to resolve the bind expression. A matching segment must exist in the current flexfield context.

This bind variable is useful when the set of valid values depends on the value in another segment and that segment code can vary, such as when the value set is used for more than one context or flexfield. For example, the values to select from a CITIES table might depend upon the selected country. If the value set for the segment that contains the country value is COUNTRIES, then the WHERE clause for the CITIES table might be `<country_code> = :{VALUESET.COUNTRIES}`.

**Flexfield Internal Code**

`:({FLEXFIELD.<internal_code>})`

This bind variable refers to an internal code of the flexfield in which the value set is used, or to a validation date. The `<internal_code>` must be one of the following:

- `APPLICATION_ID` - the application ID of the flexfield in which this value set is used. The data type of `APPLICATION_ID` and its resulting bind value is `NUMBER`. 
• **DESCRIPTIVE_FLEXFIELD_CODE** - the identifying code of the flexfield in which this value set is used. The data type of DESCRIPTIVE_FLEXFIELD_CODE and its resulting bind value is VARCHAR2. Note that you use this string for both descriptive and extensible flexfields.

• **CONTEXT_CODE** - the context code of the flexfield context in which this value set is used. The data type of CONTEXT_CODE and its resulting bind value is VARCHAR2.

• **SEGMENT_CODE** - the identifying code of the flexfield segment in which this value set is used. The data type of SEGMENT_CODE and its resulting bind value is VARCHAR2.

• **VALIDATION_DATE** - the current database date. The data type of VALIDATION_DATE and its resulting bind value is DATE.

**Flexfield Parameters**

`: {PARAMETER.<parameter_code>}`

This bind variable refers to the value of a flexfield parameter where parameter_code identifies the parameter. The data type of the resulting bind value is the same as the parameter’s data type.

**Note:** You cannot assign a table value set to a context segment if the WHERE clause uses VALUESET.value_set_code or SEGMENT.segment_code bind variables.

**Related Topics**

• Table-Validated Value Set: Worked Example

**Importing Value Set Values: Procedure**

You can import a file containing values that you want to edit or add to a given independent or dependent value set.

For example, uploading a hundred values may be more efficient than creating them individually using the Manage Value Sets task. However, for just a few values, it may be quicker to perform the relevant tasks.

**Importing Value Set Values**

To import value set values:

1. Create a flat file containing the values in the value set that you want to add or update.

   **Note:**
   
   o When creating the file, you must specify an existing value set code to which you want to add values or edit existing values. If the value set does not exist, add the value set using the appropriate Manage Value Sets setup task in the Setup and Maintenance work area.
   
   o The file that you create must adhere to the formatting and content requirements for creating flat files containing value set values.

2. Upload the flat file to the content repository using the Files for Import and Export page.

3. Import the file using the appropriate Manage Value Sets setup task in the Setup and Maintenance work area. To import the file:
   
   a. Click **Actions - Import** in the Manage Value Sets page.
   
   b. In the File Name field, enter the name of the flat file you uploaded using the Files for Import and Export page.
c. In the Account field, select the user account containing the flat file.

d. Click Upload.

**Note:** Alternatively, you can import the file using either of the following methods:
- Run the Upload Value Set Values scheduled process.
- Use the Applications Core Metadata Import web service. For more information on the Applications Core Metadata Import web service, see the SOAP Web Services guide for your cloud services.

**Related Topics**
- Files for Import and Export: Explained

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**Requirements for Flat Files to Upload Value Set Values: Explained**

You can import large volumes of value set value data from the content repository. To upload value set values to the content repository, create a flat file containing the values in the value set that you want to add or update. You upload these flat files to the content repository using the Files for Import and Export page.

**General Requirements**

The first line of the flat file must contain the column names for the value set value data, including all mandatory columns, and separated by the '|' (pipe) character. Each subsequent line should contain a row of data specified in the same order as the column names, also separated by the '|' character.

The requirements for creating flat files vary with the type of value sets:
- Independent value sets
- Dependent value sets

**Independent Value Set**

A flat file for uploading values for independent value sets must contain the following mandatory columns:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>ValueSetCode</td>
<td>VARCHAR2(60)</td>
</tr>
<tr>
<td>Value</td>
<td>VARCHAR2(150)</td>
</tr>
<tr>
<td>Enabled Flag</td>
<td>VARCHAR2(1), Y or N</td>
</tr>
</tbody>
</table>

**Note:** You can also specify optional columns.

Examples:
- To upload values to a COLORS independent value set with the minimum columns, you can use the following flat file:

```
ValueSetCode | Value | EnabledFlag
COLORS | Red | Y
COLORS | Orange | Y
```
COLORS | Yellow | Y

- To upload values to a STATES independent value set with more (optional) columns, you can use the following flat file:

<table>
<thead>
<tr>
<th>ValueSetCode</th>
<th>Value</th>
<th>Description</th>
<th>EnabledFlag</th>
</tr>
</thead>
<tbody>
<tr>
<td>STATES</td>
<td>AK</td>
<td>Alaska</td>
<td>Y</td>
</tr>
<tr>
<td>STATES</td>
<td>CA</td>
<td>California</td>
<td>Y</td>
</tr>
<tr>
<td>STATES</td>
<td>WA</td>
<td>Washington</td>
<td>Y</td>
</tr>
</tbody>
</table>

**Dependent Value Sets**

A flat file for uploading values for dependent value sets must contain the following mandatory columns:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value Set Code</td>
<td>VARCHAR2(60)</td>
</tr>
<tr>
<td>Independent Value</td>
<td>VARCHAR2(150)</td>
</tr>
<tr>
<td>Value</td>
<td>VARCHAR2(150)</td>
</tr>
<tr>
<td>Enabled Flag</td>
<td>VARCHAR2(1), Y or N</td>
</tr>
</tbody>
</table>

*Note:* You can also specify optional columns.

**Example:**

To upload values to a CITIES dependent value set (dependent on the STATES independent value set), you can use the following flat file:

<table>
<thead>
<tr>
<th>ValueSetCode</th>
<th>IndependentValue</th>
<th>Value</th>
<th>EnabledFlag</th>
</tr>
</thead>
<tbody>
<tr>
<td>CITIES</td>
<td>AK</td>
<td>Juneau</td>
<td>Y</td>
</tr>
<tr>
<td>CITIES</td>
<td>AK</td>
<td>Anchorage</td>
<td>Y</td>
</tr>
<tr>
<td>CITIES</td>
<td>CA</td>
<td>San Francisco</td>
<td>Y</td>
</tr>
<tr>
<td>CITIES</td>
<td>CA</td>
<td>Sacramento</td>
<td>Y</td>
</tr>
<tr>
<td>CITIES</td>
<td>CA</td>
<td>Los Angeles</td>
<td>Y</td>
</tr>
<tr>
<td>CITIES</td>
<td>CA</td>
<td>Oakland</td>
<td>Y</td>
</tr>
</tbody>
</table>

**Additional Optional Columns**

In addition to the mandatory columns, you can add the following optional columns for both dependent and independent value sets:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Translated Value</td>
<td>VARCHAR2(150), for use in value sets that are translatable</td>
</tr>
<tr>
<td>Description</td>
<td>VARCHAR2(240)</td>
</tr>
<tr>
<td>Start Date Active</td>
<td>DATE, formatted as YYYY-MM-DD</td>
</tr>
<tr>
<td>End Date Active</td>
<td>DATE, formatted as YYYY-MM-DD</td>
</tr>
</tbody>
</table>
### Upload Value Set Values Process

This process uploads a flat file containing value set values for flexfields. You can use this scheduled process to upload a file containing values you want to edit or add to an existing independent or dependent value set. This process is useful for adding or updating large volumes of value set value data in an automated or recurring fashion. For example, you can upload a hundred values on a recurring basis when scheduled as a recurring process. This method may be more efficient than using the one-time Import action in the Manage Value Sets tasks in the Setup and Maintenance work area. However, for an ad hoc task of uploading a hundred values, it may be quicker to use the Import action in the relevant tasks.

Run this process from the Scheduled Processes Overview page. You can run it on a recurring basis whenever the flat file in the content repository account is updated.

You must create the flat file containing the values data, and upload the flat file to the content repository using the Files for Import and Export page.

#### Parameters

**Flat File Name**

Enter the name of the flat file you uploaded using the Files for Import and Export page.

**Account**

Select the user account containing the flat file in the content repository to upload.

### Related Topics

- Files for Import and Export: Explained
- Scheduled Processes: Explained
Translating Flexfield and Value Set Configurations: Explained

When you first configure a flexfield or segment, the translatable text that you enter, such as prompts and descriptions, is stored as the text for all installed locales. You may then provide a translation for a particular locale. If you don’t provide a translation for a given locale, then the value that was first entered is used for that locale.

To translate the text for a particular locale, log in with that locale or specify the locale by selecting **Settings and Actions - Personalization - Set Preferences** in the global area. Then, update the translatable text in the flexfield using the Manage Descriptive Flexfields task, Manage Key Flexfields task, or Manage Extensible Flexfields task. Your modifications change the translated values only for the current session’s locale.

After you complete the translations, deploy the flexfield.

You can define translations for a dependent value set or an independent value set, if it is of type Character with a subtype of Translated text. You define the translations by setting the current session to the locale for which you want to define the translation and using the Manage Value Sets task to enter the translated values and descriptions for that locale.

For a table value set for which the underlying table supports multiple languages and for which the value set’s value column is based on a translated attribute of the underlying table, you can define translated values using the maintenance task for the underlying table. For more information on using multilanguage support features, see the Oracle Fusion Applications Developer’s Guide.

FAQs for Managing Value Sets

**What happens if a value set is security enabled?**

Value set security is a feature that enables you to secure access to value set values based on the end user’s role in the system.

As an example, suppose you have a value set of US state names. When this value set is used to validate a flexfield segment, and users can select a value for the segment, you can use value set security to restrict them to selecting only a certain state or subset of states based on their assigned roles in the system.

For example, Western-region employees may choose only California, Nevada, Oregon, and so on as valid values. They cannot select non-Western-region states. Eastern-region employees may choose only New York, New Jersey, Virginia, and so on as valid values, but cannot select non-Eastern-region states. Value set security is implemented using Oracle Fusion Applications data security.

**How can I set a default value for a flexfield segment?**

When you define or edit a flexfield segment, you specify a default value from the values provided by the value set assigned to that segment.

You can set the default value for a descriptive flexfield segment to be a parameter, which means the entity object attribute to which the chosen parameter is mapped provides the initial default value for the segment.

You can set the default value to be a constant, if appropriate to the data type of the value set assigned to the segment.

In addition to an initial default value, you can set a derivation value for updating the attribute’s value every time the parameter value changes. The parameter you choose identifies the entity object source attribute. Any changes in the value of the source attribute during run time are reflected in the value of the segment.
Managing Descriptive Flexfields

Enabling Descriptive Flexfield Segments for Business Intelligence:
Points to Consider

A descriptive flexfield that is registered in the database as enabled for Oracle Business Intelligence (BI) includes a BI Enabled setting for each of its segments. When a global, context, or context-sensitive segment is BI-enabled, it is available for use in Oracle Business Intelligence.

The following aspects are important in understanding BI-enabled flexfield segments:

- Flattening business components to use BI-enabled segments in Oracle BI
- Equalizing segments to prevent duplication and complexity in the flattened component
- Mapping attributes of flattened business components to logical objects in Oracle BI
- Managing the labels that map segments to logical objects in Oracle BI

After you deploy a business intelligence-enabled flexfield, use the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process to import the flexfield changes into the Oracle Business Intelligence repository. Users can make use of the newly-generated attributes in business intelligence applications. For example, a user can generate a report that includes attributes added by the descriptive flexfield. For additional information about logical objects and import, refer to the Oracle Transactional Business Intelligence Administrator’s Guide.

Flattening

When you deploy a business intelligence-enabled descriptive flexfield, the deployment process generates an additional set of flattened Application Development Framework (ADF) business components in addition to the usual ADF business components and ADF faces run time artifacts that are generated during deployment. The flattened business components include attributes for business intelligence-enabled segments only. Flattening means each custom column in each context shows up as an attribute in an Oracle Business Intelligence folder.

Flattened components include one attribute for the BI-enabled context-segment, and one attribute for each business intelligence-enabled global segment. For BI-enabled context-sensitive segments, consider the following:

- If you assigned a label to the segment, the flattened components include an additional single attribute representing segments with that label.
- If you didn’t assign a label, the flattened components include a discrete attribute for each BI-enabled context-sensitive segment in each context.

Mapping to Logical Objects in Business Intelligence

You can simplify reporting by representing similar segments as a single logical object in Business Intelligence.

If you assign a label to any set of context-sensitive segments that serve the same purpose in different contexts, you can consolidate or equalize the segments into a single attribute. This prevents duplication and the extra workload and complexity that result from the flattening process. For example, a United States context might have a Passport segment and a Canada
context might have Visa segment. If you assign the NationalID segment label to both the Passport and Visa segments, they are equalized into the same NationalID attribute in the flattened business component.

Non-labeled context-sensitive segments aren't equalized across context values, so the flattened components include a separate attribute for each context-sensitive segment for each context value. It may not be possible to equalize similarly labeled segments if they have incompatible data types or value set types.

Assign a label to a global segment, context segment, or context-sensitive segment to map the corresponding attribute in the flattened components to a logical object in Oracle Business Intelligence. Using labels to map segments to BI logical objects minimizes the steps for importing the flexfield into Oracle Business Intelligence.

☝️ Note: Assigning a label to a context-sensitive segment serves to equalize the attribute across contexts, as well as map the equalized attribute to business intelligence.

Managing Labels

You may assign a predefined label (if available) to segments or create new labels for assignment, as needed. Specify a code, name, and description to identify each label. In the BI Object Name field, enter the name of the logical object in Oracle Business Intelligence to which the segment label should map during import. Specifying the BI logical object minimizes the steps for importing the flexfield into Oracle Business Intelligence and helps to equalize context-sensitive segments across contexts.

If no labels are assigned to a BI-enabled segment, or the BI Object Name on the assigned label doesn’t exist in business intelligence, you must manually map the segment to the desired logical object when importing into Oracle Business Intelligence.

In addition, context-sensitive segments without labels cannot be equalized across context values. The flattened components include a separate attribute for each non-labeled context-sensitive segment in each context.

Importing to Oracle Business Intelligence Repository

After you deploy a business intelligence-enabled flexfield, import the flexfield changes into the Oracle Business Intelligence repository to make use of the newly flattened business components in business intelligence and then propagate the flexfield object changes. When you import the metadata into the Oracle Business Intelligence repository, you must do so as the FUSION_APPS_BI_APPID user.

To import flexfield changes into the Oracle Business Intelligence repository in Oracle Cloud implementations, run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process. For additional information about import, refer to the Oracle Transactional Business Intelligence Administrator’s Guide.

☝️ Note: When you import a flexfield into the Oracle Business Intelligence repository, you see both <name>_ and <name>_c attributes for each segment, along with some other optional attributes. The <name> attribute contains the value. The <name>_c attribute contains the code of the value set that the value comes from, and is used for linking to the value dimension. You must import both attributes.

Related Topics

• Enabling Key Flexfield Segments for Business Intelligence: Points to Consider
Base Transaction Descriptive Flexfield: Explained

Use Base Transaction incentive compensation descriptive flexfield global segments to store transaction attributes that do not exist by default in the CN_TP_TRANSACTIONS_ALL table.

The global segment data types VARCHAR2 and NUMBER have the following customizable attributes available for immediate use.

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td>VARCHAR2 (240 CHAR)</td>
<td>ATTRIBUTE1 - ATTRIBUTE150</td>
</tr>
<tr>
<td>NUMBER</td>
<td>ATTRIBUTE_NUMBER1 -- ATTRIBUTE_NUMBER50</td>
</tr>
</tbody>
</table>

In the Setup and Maintenance work area:

- Use the Manage Incentive Compensation Descriptive Flexfield task to configure one or more global segments, including associating any relevant value sets or lookups, and deploy the Base Transaction descriptive flexfield.
- Use the Configure Tables and Columns task to enable the global segments for use in the calculation process.
- Use the Manage Custom Rule Qualifiers task to enable the global segments for use in the crediting and classification processes.

**Related Topics**

- Descriptive Flexfields: Explained
- Flexfields and Oracle Applications Cloud Architecture: How They Work Together
- Managing Descriptive Flexfields: Points to Consider
Defining Incentive Compensation Shared Configuration

Base Transaction Descriptive Flexfield: Explained

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- Use the Manage Custom Rule Qualifiers task to enable the global segments for use in the crediting and classification processes.

Related Topics

- Descriptive Flexfields: Explained
- Flexfields and Oracle Applications Cloud Architecture: How They Work Together
- Why did my flexfield changes not appear in the run time UI?
- How can I set a default value for a flexfield segment?
- Managing Descriptive Flexfields: Points to Consider

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.
Incentive Compensation Calendars

Managing Incentive Compensation Calendars

Watch: This video tutorial shows you how to add a period to an Incentive Compensation calendar, open the period, and verify interval numbers.

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_CArdENARDS 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_INT_TYPES 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_INT_TYPES**: 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**
- Setting Incentive Compensation Period Status: Explained

### FAQs for Defining Shared Configuration for Incentive Compensation

**How can I optimize incentive compensation performance while using attributes??**

The first 15 incentive compensation transaction attributes in the **CN_TP_EARNINGS_ALL** table always match exactly the first 15 incentive compensation transaction attributes in the **CN_TP_TRANSACTIONS_ALL** table. You can optimize performance by populating the first 15 flexfields with values most frequently used in calculation expressions.

**Related Topics**
- How can I optimize throughput for incentive compensation batch processing?
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.

What happens if I assign a calendar to an incentive compensation business unit?

You can update the calendar name and add more periods. You cannot change the period type.

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.
11 Defining Incentive Compensation Business Unit Configuration

Managing 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>
<tr>
<td>Payment</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>
</tbody>
</table>

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.

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>
<tr>
<td>Rollup Crediting only</td>
<td>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.</td>
</tr>
</tbody>
</table>

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>
</tbody>
</table>
Rollup Hierarchy Option | Description
--- | ---
Rollup hierarchy | Participants in parent positions automatically receive all of the credit for participants in descendant positions who report to them.
Both | Use both the credit and rollup hierarchies to determine rollup credit.

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>
<tr>
<td>Rollup hierarchy</td>
<td>CN_TP_CUSTOM_SUMMARIZE_CREDITS. summarizecredits without_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>
</tbody>
</table>
## Use Case

<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. 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>Collect transactions that include credit receivers. Also create team credits where every team member receives the same attainment based on each others' sales, without a reporting structure.</td>
<td>No</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>No</td>
<td>Not applicable</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.</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.

Automatic Role Assignment Parameters: Critical Choices

You can use rules to automatically assign roles to participants. The Run Participant Assignment process compares the attributes of participants with participant assignment rules and generates proposed assignments. Settings that you make using the Review and Approval of Role Assignment Proposals region of Manage Parameters determine whether or not proposals require review and approval to be made active.
New Participants Parameter
If you select Required, then every assignment proposal for a new participant requires review, approval, and submission to become active. If you select Not Required, then the role assignments are active after the Run Participant Assignment process runs. The default setting is Not Required.

Existing Participants Parameter
You have several choices for participants who already have an assigned role. If you select Not Required, then the role assignments are active after the Run Participant Assignment process runs. Your other choices are to require review and approval for role deletions only, role updates and deletes only, or for all role assignments. The default setting is Required.

Participant Termination Processing Parameters: Explained
When an Incentive Compensation participant is terminated in HCM Cloud, a process picks up the termination action and termination date and updates participant information. You must enable participant termination processing and set parameters to define how the termination date is applied. The Run All Participant Processes process, with HCM Updates selected, updates the participant active end date with the termination date. The compensation end date is used to support continued incentive processing for a grace period. The pay group always ends on the compensation end date. Use the Manage Parameters UI to define the following parameters:

- **Period End for Compensation End Date**
  The compensation end date is used to support continued incentive processing for a grace period. This period of time is typically when any final adjustments and payments are made to close out the participant. You can set the compensation end date in either of the following ways:
  - Set it to occur at the end of the period containing the participant active end date (which is the same as the termination date). For example, if the termination date is April 15 and your calendar period is monthly, then the compensation end date is April 30.
  - Set it to occur a set number of periods after the active end date. If you select 3 periods, then the compensation end date is July 31.

- **Plan Assignment End Date**
  Choose either the participant active end date or the compensation end date to be the compensation plan assignment end date.

- **Payment Plan Assignment End Date**
  Choose either the participant active end date or the compensation end date to be the payment plan assignment end date.

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 paysheets 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
FAQs for Managing Parameters

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.

Managing 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>
</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>
<tbody>
<tr>
<td>Period</td>
<td>Year</td>
<td>From Date</td>
<td>To Date</td>
<td>Interval Number</td>
</tr>
<tr>
<td>-------</td>
<td>------</td>
<td>-------------</td>
<td>-------------</td>
<td>-----------------</td>
</tr>
</tbody>
</table>

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

**FAQs for Managing 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.

**Configuring Tables 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

**Delivered Incentive Compensation User-Defined Functions: Explained**

User-defined functions are custom PL/SQL functions that give more freedom in expression building. The following table identifies and describes the delivered user-defined functions and provides use case examples. Add user-defined functions to an expression using the expression builder in the Compensation Plans work area.

<table>
<thead>
<tr>
<th>User-Defined Function</th>
<th>Description</th>
<th>Use Case Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Category Name</td>
<td>Name associated with the credit category identifier.</td>
<td>Determine the commission rate based on the credit category.</td>
</tr>
<tr>
<td></td>
<td>Use the result for a rate table lookup.</td>
<td></td>
</tr>
<tr>
<td>Date Difference</td>
<td>Difference between two dates in terms of days, weeks, months, or quarters.</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>The return value could be days, weeks, months, quarters, and so on, based on</td>
<td></td>
</tr>
<tr>
<td></td>
<td>the Period Type input parameter.</td>
<td></td>
</tr>
<tr>
<td>Previous Interval Attainment</td>
<td>Measure the attainment for the previous time interval.</td>
<td>Pay participant based on growth, defined as current interval attainment over</td>
</tr>
<tr>
<td></td>
<td>The calculation doesn’t round or truncate results. Also, if the previous</td>
<td>previous interval attainment.</td>
</tr>
<tr>
<td></td>
<td>interval has no attainment record for the measure, then the return value is</td>
<td></td>
</tr>
<tr>
<td></td>
<td>zero.</td>
<td></td>
</tr>
<tr>
<td>Product Name</td>
<td>Name associated with the product identifier.</td>
<td>Determine commission rate based on the product.</td>
</tr>
<tr>
<td></td>
<td>The calculation returns the results in upper case. Use the result for a rate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>table lookup.</td>
<td></td>
</tr>
<tr>
<td>User-Defined Function</td>
<td>Description</td>
<td>Use Case Example</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>Prorated Measure Participation</td>
<td>Proportion of the number of participated days in the performance measure interval.</td>
<td>Adjust the measure attainment based on plan participation. Typical in quota-based calculations.</td>
</tr>
<tr>
<td></td>
<td>The actual calculation is (Number of Participation Days in Performance Measure) divided by (Number of Days in Calendar Interval).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The calendar interval is the formula interval for the period ID.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The calculation assumes that the proration is based on calendar days and not on workdays.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The calculation doesn’t round or truncate results.</td>
<td></td>
</tr>
<tr>
<td>Prorated Plan Component Participation</td>
<td>Proportion of the number of participated days in the plan component interval.</td>
<td>Adjust earnings based on plan participation. Typical in bonus and MBO plans.</td>
</tr>
<tr>
<td></td>
<td>The actual calculation is (Number of Participation Days in Plan Component) divided by (Number of Days in Calendar Interval).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The calendar interval is the formula interval for the period ID.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The calculation assumes that the proration is based on calendar days and not on workdays.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• The calculation doesn’t round or truncate results.</td>
<td></td>
</tr>
<tr>
<td>Rolling Average Attainment</td>
<td>Average attainment for the measure for a specified number of time intervals.</td>
<td>Pay participant based on rolling average attainment.</td>
</tr>
<tr>
<td></td>
<td>The calculation starts from the current interval.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Example: Assume that the interval is monthly, the period passed is May, and the number of intervals passed is 4. The calculation returns average attainment for February, March, April, and May (the current period).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>If previous intervals have no or insufficient attainment records for the measure, then the average attainment calculation:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1. Sums the attainment for the available intervals</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Divides the sum by the number of available intervals</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Example: If only two records are available and three month rolling is required, then the</td>
<td></td>
</tr>
</tbody>
</table>
## User-Defined Function

<table>
<thead>
<tr>
<th>User-Defined Function</th>
<th>Description</th>
<th>Use Case Example</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>calculation sums the two months and divides by two.</td>
<td>Support true-up for bonuses.</td>
</tr>
</tbody>
</table>

### YTD Target Incentive

Year-to-date target incentive for the plan component.

The actual calculation is (Target Incentive of Plan Component) multiplied by (Ratio of Current Interval Number to Number of Intervals Passed).

- The returned value is in the calculation currency.
- The calculation assumes that the plan component is for the calendar year.

⚠️ **Caution:** You can’t import plans with expressions containing one or more user-defined functions that use the participant plan, plan component, formula, and measure IDs because the IDs don’t exist yet in the destination environment. Or, if they do exist, then they don’t reference the same attributes as the source environment. The import will fail.

For details about enabling attributes to pass to incentive compensation user-defined functions, see the Enabling Attributes to Pass as Input Parameters for User-Defined Functions: Procedure topic.

### Related Topics

- Creating Incentive Expressions with User-Defined Functions: Procedure

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### Enabling Attributes to Pass as Input Parameters for User-Defined Functions: Procedure

This topic covers how to enable columns for calculation using the Configure Tables and Columns task in the Setup and Maintenance work area. The user name of the column is the attribute that the input parameter passes to the user-defined function.

The user-defined functions are:

- Credit Category Name
- Date Difference
- Prorated Plan Component Participation and YTD Target Incentive
- Prorated Measure Participation, Previous Interval Attainment, and Rolling Average Attainment

Each function section contains:

- The columns that you must enable for each function
- A suggested user name for each column as these columns don’t have standard user names

Each column that you enable for calculation must have a corresponding user name, because the user name appears in the expression builder choice lists. You use the choice lists to select the attribute that each input parameter passes to the
function. On the Tables and Columns toolbar View menus, select **Query By Example** to more quickly isolate the relevant table or columns.

Additional Information:

- For descriptions and use case examples of each user-defined function, see the Incentive Compensation User-Defined Functions: Explained topic.
- For details about creating user-defined expressions with these attributes, see the Creating Incentive Expressions with User-Defined Functions: Procedure topic.

### Enabling Credit Category Name Attribute

Select the CN_TP_CREDITS_ALL table to enable the following column and enter the suggested user name, if one isn’t already present.

<table>
<thead>
<tr>
<th>Column to Enable for Calculation</th>
<th>Suggested User or Attribute Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>ELIGIBLE_CAT_ID</td>
<td>Credit category ID</td>
</tr>
</tbody>
</table>

### Enabling Date Difference Attributes

Select the CN_TP_CREDITS_ALL table to enable the following columns and enter the suggested user names, if they aren’t already present.

💡 **Tip:** Enable for calculation only the date columns that you want users to select.

<table>
<thead>
<tr>
<th>Column to Enable for Calculation</th>
<th>Suggested User or Attribute Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>CREDIT_DATE</td>
<td>Credit date</td>
</tr>
<tr>
<td>ROLLUP_DATE</td>
<td>Rollup date</td>
</tr>
</tbody>
</table>

### Enabling Prorated Plan Component Participation and YTD Target Incentive Attributes

These two user-defined functions use the same attributes.

Select the CN_SRP_PER_FORM_METRICS_ALL table to enable the following columns and enter the suggested user names, if they aren’t already present.

<table>
<thead>
<tr>
<th>Column to Enable for Calculation</th>
<th>Suggested User or Attribute Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>SRP_COMP_PLAN_ID</td>
<td>Participant plan ID</td>
</tr>
<tr>
<td>PLAN_COMPONENT_ID</td>
<td>Plan component ID</td>
</tr>
<tr>
<td>PERIOD_ID</td>
<td>Period ID</td>
</tr>
</tbody>
</table>
Enabling Prorated Measure Participation, Previous Interval Attainment, and Rolling Average Attainment Attributes

These three user-defined functions use the same attributes.

Select the CN_SRP_PER_FORM_METRICS_ALL table to enable the following columns and enter the suggested user names, if they aren’t already present.

<table>
<thead>
<tr>
<th>Column to Enable for Calculation</th>
<th>Suggested User or Attribute Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>SRP_COMP_PLAN_ID</td>
<td>Participant plan ID</td>
</tr>
<tr>
<td>PLAN_COMPONENT_ID</td>
<td>Plan component ID</td>
</tr>
<tr>
<td>PERIOD_ID</td>
<td>Period ID</td>
</tr>
<tr>
<td>FORMULA_ID</td>
<td>Measure ID</td>
</tr>
</tbody>
</table>

Enabling Product Name Attribute

Select the CN_TP_TRANSACTIONS_ALL table to enable the following column and enter the suggested user name, if one isn’t already present.

<table>
<thead>
<tr>
<th>Column to Enable for Calculation</th>
<th>Suggested User or Attribute Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>INVENTORY_ITEM_ID</td>
<td>Product ID</td>
</tr>
</tbody>
</table>

Related Topics

- Creating Incentive Expressions with User-Defined Functions: Procedure

Adding Custom Functions to the Expression Builder User Defined Functions Menu: Procedure

Use this procedure to add a custom PL/SQL function to the User Defined Functions menu of the incentive compensation expression builder.

1. Create the function in the database using SQL Plus.
2. Create a service request asking the incentive compensation product development team to review the code.
3. Create a collaboration service request for the development team to update the package.
4. Add a lookup code that matches the name of the user-defined function to the lookup type CN_USER_FUNCTIONS. Use the Manage Incentive Compensation Lookups task in the Setup and Maintenance work area.
5. On the create or edit expression pages in the Compensation Plan work area, select the function on the User Defined Functions menu.
Related Topics

- Creating Incentive Expressions with User-Defined Functions: Procedure
- Incentive Compensation Expressions: Explained

FAQs for Configuring Tables and Columns

How can I enable an attribute to show in the incentive compensation expression builder?

Use the Configure Tables and Columns task to enable the attribute for calculation and select the appropriate level 2 expression grouping. Also add a user-friendly name for the attribute, which the application displays in the expression builder.

Managing Earning Types

Incentive Compensation Earning Types: Explained

Use earning types to determine the form of participant incentives. Example: Participants associated with plan components where the Earning Type is Monetary Earnings receive cash compensation for earnings related to these plan components. Use the delivered Monetary Earnings type or create custom earning types, as required.

Monetary Earning Type

Monetary Earnings is the only earning type that:

- Has monetary value
- Is included in incentive payment processing

You cannot delete the earning type Monetary Earnings. You can delete all other earning types as long as they are not associated with any plan component or used in converting other earning types.

Custom Earning Types

You can create required earning types and associate them with plan components. The calculation process creates earnings for these plan components, such as 500 Points, and stores them under COMM_AMT_CALC_CURRENCY in the Earnings table.

*Note:* The calculation process doesn’t convert nonmonetary earnings, such as Points, to participant home currency or operating currency. It stores the nonmonetary earnings separately in the participant subledger.

Since the payment module doesn’t include nonmonetary earnings, you can export those earnings and set their statuses to Posted. Setting the status to Posted ensures that the same nonmonetary earnings aren’t included in the next export.

When you run the report for the nonmonetary earning type, such as Points, the participant reports show the earnings in the earning type. Example: The report amount is 500 and the earning type is Points.
Participant reports show only those plan components containing the earning type selected for the report run. Affected reports include:

- YTD (Year-to-Date)
- Earning Details
- Commission Statement

Managing Open Period Process

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.

   \(\text{Note:}\) 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_INT_TYPES 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.
ο **CN_CAL_PER_INT_TYPES**: 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

The current period status constrains the available selections that you can to set the new status. The following table describes the available status selections based on the current period status:

<table>
<thead>
<tr>
<th>Current Period Status</th>
<th>Available Status Selections</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Opened</td>
<td>Edit this status to either Future Entry or Open. You can’t change a period status to Open if any prior period status is Not Opened or Future Entry.</td>
</tr>
<tr>
<td>Future Entry</td>
<td>Edit this status to Open.</td>
</tr>
<tr>
<td>Open</td>
<td>Edit this status to either Closed or Permanently Closed. You can’t edit a period to Closed if:</td>
</tr>
<tr>
<td></td>
<td>• Any prior period status is Not Opened, Future Entry, or Open</td>
</tr>
<tr>
<td></td>
<td>• Any trial payment batches are unpaid. Delete or pay the batch first, then close the period.</td>
</tr>
<tr>
<td></td>
<td>You can’t edit a period to Permanently Closed if any prior period is Not Opened, Future Entry, Open, or Closed.</td>
</tr>
<tr>
<td>Closed</td>
<td>Edit this status to either Open or Permanently Closed.</td>
</tr>
</tbody>
</table>
Current Period Status | Available Status Selections
---|---
Permanently Closed | After you permanently close a period, you can’t reopen it and the application doesn’t process transactions of any kind.

Be sure that there are no new transactions, adjustments, payments, or any other outstanding transactions before you permanently close a period.

FAQs for Managing Open Period Process

**Why can’t I edit or delete this incentive compensation period?**

Most likely, one or more business units use the period or were opened. Or, deleting this period might cause noncontinuous periods, which the application doesn’t allow.

To edit details, such as dates and sequence, for a period that you haven’t yet opened and did assign to a business unit:

1. Delete the period.
2. Create it again

Make your edits using one of these tasks:

- Manage Periods in the Participant Assignments work area
- Manage Open Period Process in the Setup and Maintenance work area

To edit a period that is in the middle of the year, start from the last period defined.

Example: If the date range for Sep-15 was wrongly defined and requires correction, starting from the last period, Dec-15:

2. Edit the details for Sep-15.

**Why can’t I see incentive compensation period data in participant reports?**

On the Manage Periods page, select **Display period data in participant reports** for each relevant period.

Use either of these tasks to open the page:

- Manage Periods in the Participant Assignments work area
- Manage Open Period Process in the Setup and Maintenance work area

Managing Participant Imports

**Incentive Compensation Import Participants Parameters**

Participants are persons or parties who participate in the incentive compensation processes. A person can either be a participant who is eligible to be assigned to incentive compensation plans or an incentive compensation administrator, such as an analyst or compensation manager. You can import participants using the Import Participants task in the Participant Assignment work area. The eligible participant must already exist as a person in Global Human Resources or a party in Trading Community Model.
You can use three types of parameters when importing participants as described in the following table.

<table>
<thead>
<tr>
<th>Parameter Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run For</td>
<td>The parameter which indicates if you are populating the staging table yourself or if Oracle is populating it based on existing persons and parties.</td>
</tr>
<tr>
<td>Target</td>
<td>The set of values that the imported participant inherits. For example, by selecting Vision Operations as the business unit participant value, all participants imported inherit the Vision Operations business unit.</td>
</tr>
<tr>
<td>Filter</td>
<td>The criteria used to select persons and parties for incentive compensation participant import.</td>
</tr>
</tbody>
</table>

**Run For Parameter**

**Staging and Oracle Incentive Compensation Participant Import**

If you are a using Oracle Sales Cloud Incentive Compensation, then select this choice. You can ignore the scenario name and scenario version parameters.

**Oracle Incentive Compensation Participant Import**

If your installation is on-premise and you intend to populate the staging table, then select this choice.

**Target Parameters**

**Business Unit**

Required. Select the destination incentive compensation business unit for the imported participants.

**Participant Home Currency**

If this target parameter has a value, then the import process uses it to populate the participant currency attribute. If you don’t select a target parameter value, then the import process uses the operating currency from the value you provided using the Setup and Maintenance work area, Manage Parameters task.

**Analyst Name**

If this target parameter has a value, then the import process uses it to assign the analyst to the imported participants. If you don’t provide a target parameter value, then you can assign analysts to participants after they are imported using the Participant Assignments work area, Manage Analyst Assignments task.

**Target Country**

The import process uses the country defined for the party. For employees, the country is determined from the employee location value. For other parties, the country is determined from the party’s identifying (primary) address. If a value isn’t defined for the party, then the import process uses the target country parameter value to populate the participant country attribute.

**Active Start Date**
If this target parameter has a value, then the import process uses it to populate the participant active start date and the participant attributes effective start date. If you don’t provide a target parameter value, then the import process uses the person hire date or party usage effective start date to populate the participant active start date and the participant attributes effective start date.

**Participant Type**

Use the Compensation Administrator participant type when importing compensation analysts and compensation managers. Use the type Participant when importing persons who are eligible to receive incentive credit. Participants can’t be deleted. If you imported participants with the incorrect type, then you can update the value using a source file and the Participant Assignments work area, Import and Update Participant Details task.

**Filter Parameters**

> **Note:** Use filter parameters whenever possible, to avoid importing extraneous participants because there is no way to delete them after import.

**Party Usage**

Required. Select the party usage. Party usages are generally assigned to parties by the application used to enter the party. Typical party usages that are eligible participants are HR Employee, HR Contingent Worker, and Partner Contact.

**Party Name**

Text input with wildcard support. If you provide a value, then the import process converts the value to upper case and then uses a 'like' comparison to select from the person and party full name value.

**HCM Job**

Text input with wildcard support. The import process converts the value to upper case and then uses a 'like' comparison to select persons in Global Human Resources who are assigned to the job. The import process searches for job assignments that are in effect using the import process run date.

**Country**

Text input without wildcard support. If you provide a value, then the import process selects parties where the party country matches. For employees, the country is determined by the employee location value. For other parties, the country is determined by the party’s identifying (primary) address.

**Start Date**

If you provide a value, then the import process selects parties where the party usage effective start date matches. Party usages are generally assigned to parties by the application used to enter the party. The assignment start date is either required by that application or the application enters a default value. For example, the start date for the HR Employee party usage is the hire date. Users assigned to the Party Center Inquiry duty role can view the party usage assignments for all parties.

**End Date**

If you provide a value, then the import process selects parties where the party usage effective end date matches.

**Role**
Text input with wildcard support. If you provide a value, then the import process converts the value to upper case and then uses a 'like' comparison to select resources who are assigned to the role. Persons are created as resources when they are assigned a resource role in the Create User page or when importing employee resources using file-based data import. The import process searches for role assignments that are in effect according to the import process run date.

Role Type

Text input without wildcard support. If you provide a value, then the import process selects resources who are assigned to the role associated with the role type. Persons are created as resources when they are assigned a resource role in the Create User page or when importing employee resources using file-based data import. A role is associated with a type when you define the role using the Setup and Maintenance, Manage Resource Roles task.

Person Number

Text input without wildcard support. If you provide a value, then the import process select persons in Global Human Resources with matching person numbers. A person number is the unique identifier generated by Global Human Resources when a person is entered.

Implementing Participant Management: Things to Consider

The following sections describe the actions you take when managing participants and the features available to perform those actions. You can determine what features you want to implement.

Creating Participants

You have the following two methods to create participants:

- Use the Run All Participant Processes process.

  The Run All Participant Processes process uses your selection rules to create new participants and your attribute mapping to collect attributes from the party and the HCM Cloud person work assignment. The selection rules are reusable and the possible attributes to select from as a source for the participant attribute number more than 200.

- Use the Import Participants process.

  The Import Participants process uses a set of filter parameters that you enter each time you submit the process. One advantage of the Import Participants process is that it does allow for participant creation where you can enter a specific party name or person number. The number of filter and target parameters are few but they may be enough for your business process. This is your only option for creating a participant for a specific party.

Updating Participants

You have the following three methods to update existing participant data:

- Use the Run All Participant Processes process.

  Use the Run All Participant Processes to import any number of files that you have uploaded to the WebCenter folder. The files contain the details to update the existing participants. This process can also collect work assignment changes from HCM Cloud. It uses the participant import mapping to determine what to update on a participant record and then collects the relevant work assignment attributes and effective dates.

- Use the Import and Update Participant Details process.
The Import and Update Participant Details process will import a single file that you specify from the files that you have uploaded to the WebCenter folder.

- **Web Service**

The Incentive Compensation Participant Version 2 web service can be used to update participant details or to place and remove the participant payment hold value. It uses the `mergeParticipantDetail`, `holdParticipantPayment`, and `terminateParticipant` methods. Note that there is an existing terminate participant option for just the active end date.

**Terminating Participants**

You have the following two methods to terminate participants:

- **Use the Run All Participant Processes process.**

  The Run All Participant Processes collects HCM Cloud terminations. It uses the termination date as the active end date and your setup configuration to end date the assignments.

- **Web Service**

  The Incentive Compensation Participant Version 2 web service can be used to terminate participants. It uses the `TerminateParticipantAutomated` method.

**Participant Selection Rules for Importing Participants: Explained**

Use the Manage Participant Selection Rules task to create rules that select participants to be imported. The Run All Participant Processes process performs the import according to the rules. You can schedule the process to run periodically.

The rules filter who, out of all HR persons and parties, should have an incentive compensation profile created. You can select HCM persons using work assignment attributes such as business unit and work location. The party attributes are the party usage and country. The resource role and role type can be used for parties that are Sales Cloud resources.

You can define one or more sets of selection rules for each incentive compensation business unit. If you plan to select parties that are not HCM persons, then create a separate rule set just for that purpose. The following table describes some of the fields in the UI:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant Type</td>
<td>The two types are participant and compensation administrator. The participant could be a salesperson or partner. The compensation administrator type is for your analysts and compensation managers. These compensation administrators manage dispute assignments, plan document and payment approval, and access participant information.</td>
</tr>
<tr>
<td>Applies If</td>
<td>Determines whether all of the rules in the rule set must be true before the person is eligible to be a participant or just one of the rules. At the rule level, you select whether all of the rule criteria must be met or any one of the criteria.</td>
</tr>
<tr>
<td>Rule Code</td>
<td>Provide a rule name or code for each rule in the set.</td>
</tr>
<tr>
<td>Rule Criteria</td>
<td>You build the rules to apply for the selected rule code.</td>
</tr>
</tbody>
</table>
Field Name | Description
---|---
Attribute | The criteria options include attributes for an HCM person’s work assignment definition. Those attributes include the business unit, department, job code, job family, job function, position code, and work location. The party country and party usage are associated with parties such as partners. HCM persons are also created as parties. They typically have country values from their work location and usage values that are HR-related such as HR employee. The resource role and role types are typically associated with your sales resources, however other types include marketing and partner resources.

Test your selection rules in a test environment. Participants cannot be deleted after import. The selection rules can be exported and imported into your production environment when you are satisfied with your testing results.

**Participant Import Mappings: Explained**

The Run All Participant Processes process uses mappings to collect information about the participant from HCM Cloud or the trading party record. The mapping is used when you first collect new participants and when collecting HCM updates to the person’s work assignment. HCM Cloud must be on the same instance as Sales Cloud. Use the Manage Participant Import Mappings task.

The Participant region of the table is for the target participant and participant detail attributes. You select the source object and related attributes in the Source region.

In the Verify Mapping region, you can select a person and click Run Test to view what the participant record will look like according to that person's work assignment. You can then make adjustments to the mapping if needed.

**Attribute Mapping Rules**

The following rules apply to mapping attributes:

- You can have only one mapping per incentive compensation business unit.
- A participant attribute can only be mapped to one source attribute.
- If the source object supports flexfields defined within a context, then you can select the source flexfield attribute and context combination.
- You can map attributes from the trading community party but keep in mind that the party record is not date effective.
- Person department general ledger accounts can be mapped as source attributes. However, when there is more than one set of accounts for a single department, the import process will not be able to distinguish which information to select. In this case, the information will not be collected.
- If the source object attribute is displayed as translated text but stored as a code, then the collection process will also collect the code.
- If you have a participant attribute that cannot be mapped, then you can populate the value using the file-based import or Web Service.
12 Defining Incentive Compensation Custom Qualifiers and Lookups

Managing Incentive Compensation Custom Qualifiers and Lookups: Procedure

You can use the Manage Incentive Compensation Custom Qualifiers and Lookups task list to create incentive compensation custom rule qualifiers. These qualifiers apply for crediting, classification, and participant role assignment rules.

The tasks in the Manage Incentive Compensation Custom Qualifiers and Lookups task list are:

1. Register Custom Qualifier Tables and Views
2. Manage Incentive Compensation Lookups
3. Manage Value Sets for Custom Qualifiers
4. Manage Descriptive Flexfields for Custom Qualifiers
5. Manage Custom Rule Qualifiers

Access this task list and associated tasks from the Setup and Maintenance work area.

Registering Custom Qualifier Tables and Views

Use registered tables, views, and lookups to dynamically create the Business Object choice list on the Create Value Set for Custom Qualifier page. Unregistered objects aren’t available in that choice list and can’t be used to create a value set. You can register custom objects as well as any lookups where the selected module is Incentive Compensation.

Managing Incentive Compensation Lookups

To create an incentive compensation lookup:

1. Start the lookup type with CN_.
2. Set the module to Incentive Compensation.

Note: You can register custom qualifier lookups only when the selected module is Incentive Compensation.

Managing Value Sets for Custom Qualifiers

On the Create Value Set for Custom Qualifier page, you select the business object from a choice list that contains only the registered tables, views, and lookups.

You can also validate whether the value set satisfies your business requirements before creating the custom rule qualifier. To perform the validation:

1. Add a data filter for the new value set.
2. Run a test to see up to the top 100 results for the display column and column ID or column values for the value set.

You cannot use value sets created using the common Manage Value Sets task with custom qualifiers.
Managing Descriptive Flexfields for Custom Qualifiers

When you create a global segment, also select **BI Enabled** so that the attribute is available for use in business intelligence dashboards and reports.

Managing Custom Rule Qualifiers

This task exposes the attribute on the relevant incentive compensation rule and transaction pages, as well as any transaction spreadsheets that you generate after completing the task.

**Related Topics**

- What’s the difference between a lookup type and a value set?
- Defining Value Sets: Critical Choices
- Flexfields and Value Sets: How They Work Together
- Value Sets: Explained

FAQs for Defining Incentive Compensation Custom Qualifiers and Lookups

How can I enable an attribute to show in the incentive compensation expression builder?

Use the Configure Tables and Columns task to enable the attribute for calculation and select the appropriate level 2 expression grouping. Also add a user-friendly name for the attribute, which the application displays in the expression builder.
13 Other Common Setup and Maintenance Tasks

Defining Transactional Business Intelligence Configuration

Defining Extensions: Define Custom Enterprise Scheduler Jobs

How can I see which applications a Manage Custom Enterprise Scheduler Jobs task includes?

In the Setup and Maintenance work area, see the task’s description in the help window for the task, if any. To open the help window, click the help icon next to the task name, on pages such as the Manage Task Lists and Tasks page.

💡 Tip:

- Click Show Help in the global area if you don’t see help icons at all on the page.
- Make sure to show the Help column in the table.

You can also:

1. Open the work area landing page, the Offerings page.
2. Select an offering that contains the specific Manage Custom Enterprise Scheduler Jobs task.
3. Open the Setup Task Lists and Tasks file for the offering, in PDF, HTML, or Excel.

Managing Job Definitions: Highlights

Users run scheduled processes based on Oracle Enterprise Scheduler jobs to process data and, in some cases, to provide report output. A job definition contains the metadata that determines what the job does and what options are available to users. You can create and edit job definitions in the Setup and Maintenance work area, using the Manage Custom Enterprise Scheduler Jobs task for your application.

Viewing Job Definitions

- Use the Manage Job Definitions tab to access predefined and custom job definitions.
- The Name column shows an asterisk for predefined job definitions.

Creating Job Definitions

- You or a technical administrator can create jobs based on Oracle Business Intelligence Publisher reports, Java, PL/SQL, or any other supported technology.
• Every predefined or custom job must have a job definition.
• For Oracle Cloud implementations, you can create custom job definitions only for custom jobs based on reports.
• The Enable submission from Enterprise Manager check box is not applicable to Oracle Cloud implementations.
  ◦ If you don’t select this check box, then the job can’t be run from Enterprise Manager.
  ◦ If you select this check box, then you can define parameters for your job definition only in Enterprise Manager. Save the rest of your work on the job definition, and then go to Enterprise Manager if you need to define parameters.

Editing Job Definitions
• You can edit all aspects of custom job definitions.
• For predefined job definitions, you can:
  ◦ Determine if user properties are read-only or not.
  ◦ Edit what are described as job properties in the Oracle Fusion Applications Extensibility Guide for Developers.

See: Customizing Existing Oracle Enterprise Scheduler Job Properties

Managing List of Values Sources: Highlights
A list of values source for Oracle Enterprise Scheduler job definitions determines where a list of values comes from and what the specific values are. Use these lists for parameters and application defined properties, for example a list of countries that users can choose from for a Country parameter.

♫ Note: Since you can’t edit parameters for predefined job definitions, list of values sources are only for parameters in custom job definitions.

Accessing List of Values Sources
• Access list of values sources in the Setup and Maintenance work area, using the Manage Custom Enterprise Scheduler Jobs task for your application.
• Open the Manage List of Values Sources tab.

Creating and Editing List of Values Sources
• Search for list of values sources to edit or delete, or to make sure a particular source doesn’t already exist before you create it.
• Create list of values sources to register them for use in job definitions.

Managing Job Sets: Highlights
A job set identifies the Oracle Enterprise Scheduler jobs to include in a single process set that users can submit instead of running the jobs separately. The job set definition also determines if the jobs run in serial or parallel, or based on other predetermined logic.
Job Set Content

- A job set can contain any number of individual jobs as well as other job sets.
- There can also be multiple levels of nested job sets within a single job set. For example, a job set can include three jobs and two job sets, one of which contains another job set.

Creating and Editing Job Sets

- Access job set definitions in the Setup and Maintenance work area, using the Manage Custom Enterprise Scheduler Jobs task for your application.
- Open the Manage Job Sets tab.

Home Page Setup

Defining Settings for Home and Navigation: Explained

Click Set System Options on the Structure page to define settings for the home page and springboard. To open the Structure page, from the Navigator menu, select Tools - Structure.

Note: You must be in an active sandbox to define these settings.

Defining Settings

You can define the following settings:

- **Home Panel**: Specify the content of the side panel that appears to the left of the springboard on the home page. Select to display either social networking content or announcements in the panel. By default, social networking content is displayed in the home panel. Also, this panel isn’t visible to partners or other external users who sign in to your application, by default. To provide access to such users, contact your security administrator.

- **Enable Infolets**: Select the infolet pages that you want to include on the home page. Based on your selection, these infolet pages will appear as a row of dots on the home page. Users can click a dot to navigate to each included infolet page. If you don’t select any infolet page in the settings, no such dots will appear on the home page.

You can use profile options to define settings for the springboard strip that you can find above all simplified pages:

- To enable users to use the springboard strip, set the Springboard Strip Enabled profile option (FND_USE_FILMSTRIP) to Yes.
- If the FND_USE_FILMSTRIP profile option is set to Yes, then you can display the springboard strip as expanded by default. To do so, set the Springboard Strip Expanded profile option (FND_EXPAND_FILMSTRIP) to Yes. A user can still collapse or expand the strip on any page, and once done, this profile option is set by default for subsequent sessions of that user.

Related Topics

- Setting Profile Option Values: Procedure
FAQs for Home Page Setup

How can I post announcements on the home page?
Use the Announcements page to create, edit, and delete announcements. From the Navigator menu, select **Tools - Announcements**.

- Only the announcement's content (not subject) appears on the home page.
- If social networking features appear instead of announcements, then on the Set System Options page, change the home panel settings to display announcements. To open this page from the Navigator menu, select **Tools - Structure**, and then click **Set System Options**.
- What you do on the Announcements page applies immediately to all users, even if you saved your changes while a sandbox is active and not yet published.

*Related Topics*

- **Setting Up Sandboxes: Procedure**

How can I enable infolets?
Follow these steps:

1. Select **Tools - Structure** from the Navigator menu.
2. Click **Edit**.
3. On the Sandbox Required dialog box, click **Activate Sandbox**.
4. Select a sandbox and set it as active.
5. On the Structure page, click **Set System Options**.
6. Select **Enable Infolets**.
7. Click **Save and Close**.

.performer:Note: To make the settings changes available to users, publish the sandbox.

FAQ for Privacy Statement

How can I enable the privacy statement?
In the Setup and Maintenance work area, open the Manage Applications Core Administrator Profile Values task and search for the **Privacy Statement URL** profile option. In the profile values section, update the **Profile Value** text box with the full URL of the web page containing the privacy content.

In the global area, click your user name and from the Settings and Actions menu, select **About This Page**. Click **Privacy Statement** to view the linked web page.

Understanding Audit Policies
Managing Audit Policies: Explained

Auditing is used to monitor user activity and all configuration, security, and data changes that have been made to an application. Auditing involves recording and retrieving information pertaining to the creation, modification, and removal of business objects. All actions performed on the business objects and the modified values are also recorded. The audit information is stored without any intervention of the user or any explicit user action.

Use audit policies to select specific business objects and attributes to be audited. The decision to create policies usually depends on the type of information to be audited and to the level of detail required for reporting.

Enabling Audit Functionality

For Oracle Applications Cloud, you must configure the business objects and select the attributes before enabling audit. If you enable audit without configuring the business objects, auditing remains inactive. By default, auditing is disabled for all applications. To enable and manage audit, ensure that you have a role with the assigned privilege Manage Audit Policies (FND_MANAGE_AUDIT_POLICIES_PRIV). For appropriate assignment of roles and privileges, check with your security administrator.

To enable auditing for Oracle Fusion Middleware products, select one of the levels at which auditing is required for that product. The audit levels are predefined and contain the metadata and events to be audited. For more information, see Audit Events for Oracle Applications Cloud Middleware (Doc ID 2114143.1) on My Oracle Support at https://support.oracle.com.

If you don’t want an application to be audited, you can stop the audit process by setting the Audit Level option to None.

Related Topics

- Audit Events for Oracle Applications Cloud Middleware

What Incentive Compensation objects can I enable to track their audit history?

You use auditing to monitor user activity and all configuration, security, and data changes that have been made to an application. You can enable business objects for auditing, recording, and retrieving information about when the objects were created, modified, and removed.

You can enable the following objects:

<table>
<thead>
<tr>
<th>Area</th>
<th>Objects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignments</td>
<td>Plans Assigned Directly</td>
</tr>
<tr>
<td>Assignments</td>
<td>Participants by Role</td>
</tr>
<tr>
<td>Assignments</td>
<td>Plans Assigned by Role</td>
</tr>
<tr>
<td>Compensation Plans</td>
<td>Compensation Plan</td>
</tr>
<tr>
<td>Compensation Plans</td>
<td>Plan Component</td>
</tr>
</tbody>
</table>
### Configuring Audit Business Object Attributes: Points to Consider

Audit enables tracking the change history of particular attributes of a business object. However, those objects and their attributes must be selected for audit and auditing must be enabled for that application. Your configuration settings determine which attributes to audit for a given object, and when the audit starts and ends. Auditing takes into account all the operations performed on an object and its attributes, such as create, update, and delete. To configure audit business object attributes, navigate to the Manage Audit Policies page in the Setup and Maintenance work area.

#### Selecting an Application

To set up auditing, you must select a web application that contains the required business objects that can be audited. From the list of business objects, select those business objects that you want to audit. Selecting a business object also displays its attributes that are enabled for auditing.

#### Selecting Attributes

For each selected business object to be audited, select the corresponding attributes to include in the audit. All attributes that belong to that object are by default selected for audit and appear on the user interface. However, you can add or remove attributes from the list. When you remove an attribute from the list, you stop auditing it even when the parent object is selected for audit. So, if you want an attribute to be audited, you must add it to the list. If the object selected in an audit hierarchy is also a part of several other audit hierarchies, the attribute configuration for that object is applicable to all the hierarchies in that application.

**Tip:** For business objects based on flexfields, select the Flexfields (Additional Attributes) check box to view and add or remove flexfield attributes, to include or exclude them from the audit.
Starting and Stopping Audit

The business object is ready for audit after you select its attributes and save the configuration changes. However, to start auditing, the audit level for Oracle Applications Cloud must be set to **Auditing** on the Manage Audit Policies page.

To stop auditing an object, you can deselect the entire object and save the configuration. As a result, all its selected attributes are automatically deselected and are not audited. To continue to audit the business object with select attributes, deselect those attributes that are not to be audited. When users view the audit history for an application, they can specify the period for which they want the results. Therefore, make a note of when you start and stop auditing an application.

For example, users intend to view the audit history of an object for the previous week, but auditing for that object was stopped last month. They wouldn’t get any audit results for that week, because during the entire month that object wasn’t audited. Even if you enable audit for that object today, users can’t get the wanted results because audit data until today isn’t available.

Configuring Audit: Highlights

To set up auditing for Oracle Applications Cloud, use the Manage Audit Policies page in the Setup and Maintenance work area. To set up auditing for Oracle Fusion Middleware products, select the level of auditing mapped to a predefined set of metadata and the events that have to be audited. Information about configuring audit for Oracle Fusion Middleware products is provided in Oracle Fusion Middleware guides.

You can also create a configuration file and deploy it to audit a specific Oracle Fusion Middleware product. The configuration details for Oracle Fusion Middleware products are available as audit-specific assets that you can use to create the config.xml configuration file. To get a list of audit-specific assets, see Audit Events for Oracle Applications Cloud Middleware (Doc ID 2114143.1) on My Oracle Support at https://support.oracle.com.

**Oracle Fusion Middleware Products**


  See: Auditing Web Services

**Oracle Fusion Security Products**

- Configure business objects to enable auditing in Oracle Fusion security products. Refer to Oracle Fusion Middleware Application Security Guide.

  See: Oracle Fusion Middleware Audit Framework Reference

**Related Topics**

- Audit Events for Oracle Applications Cloud Middleware
14 Setting Up Oracle Mobile Commissions

Oracle Mobile Commissions: Overview

Use the Oracle Mobile Commissions to do the following tasks:

- Track and review sales and commission information on your smartphone or tablet
- Keep up to date with sales compensation activities in your enterprise while on the move

Tasks that You Can Do

The key features of Oracle Mobile Commissions include the following:

- View your most recent payment.
- See your period credits, earnings, and performance related to your last payment.
- Look up payment components, balances, and other details.
- Review your earnings and performance attainment by plan component.
- Check the status and details of any disputes.
- Check your most recent payments, earnings, disputes, and credit transactions to track whether you are on target for the current period.
- View custom reports.

Prerequisites

Before implementing Oracle Mobile Commissions, you must:

- Set up Oracle Incentive Compensation before you can use Mobile Commissions.
- Assign participants to compensation plans.
- Determine if your mobile device meets mobile system requirements. See the System Requirements for Oracle Applications Cloud here: http://www.oracle.com/us/products/system-requirements/overview/index.html

Related Topics

- Installing the Oracle Mobile Commissions Android Application: Procedure
- Installing the Oracle Mobile Commissions iPhone Application: Procedure
Providing Host Information to Oracle Mobile Commissions Users: Explained

Compensation participants need host information to use Mobile Commissions. There are two methods of providing host data:

- Using a URL
- Using the mobile application

Providing a URL

You can create a URL that automatically populates the host name, port number, and enable SSL. Distribute the formatted URL to your users, for example, in an e-mail. When users access the URL from their smartphones, the Oracle Mobile Commissions application opens with the host name, port number, and SSL already populated or enabled.

Use the following URL: `oicmc://?host=[host name]:[port number];useSSL=[true or false]`. Add the host name in place of `[host name]`, port number in place of `[port number]` and after `useSSL=` enter whether you want SSL enabled. Port number and useSSL are optional. It defaults useSSL to true if not found. Here’s an example of a URL: `oicmc://?host=abc.us.oracle.com:123;useSSL=false`.

Providing Host Information

You can provide your users with the host URL value so that they can use it when they sign in to the application. To obtain the host URL:

1. Sign in to Oracle Sales Cloud.
2. Select Reports and Analytics from the navigator.
3. Click Browse Catalog.
4. Copy the URL that’s in your browser’s address bar (including the https://) until the next slash (/). Here’s an example of the URL: `https://ucfx-fapxxxx-bi.oracleads.com`.
5. Send the URL to participants.

Creating a Custom Report for Mobile Commissions: Procedure

You can customize existing reports or create your own report for Mobile Commissions. The following reports are provided:

- Credits: Credits and related details of the sales participant
- Earnings: Earnings and related details of the sales participant
- Payments: Payment transactions and related details of the sales participant
- Disputes: Details of the recent disputes raised by the sales participant
- Performance: Attainment details of the sales participant
Changing Column Names

You can change column headings in any of the reports. To change column headings:

1. Locate an existing report in Reports and Analytics and click **Edit**.
2. Click the **Criteria** tab.
3. Find the column in the Selected columns region.
4. Click the **Column Settings** icon and select **Edit formula** from the list.
5. Select **Custom Headings**.
6. In the **Column Heading** field, enter your new heading name followed by the dollar sign ($), with no space.
7. Click **OK**.
8. Save the analysis.

Customizing the Credits, Earnings, or Payments Report

To partially customize an existing report:

1. Navigate to **Reports and Analytics** under Tools.
2. Open Shared Folders/Custom/Incentive Compensation. Your custom reports must be in this folder.
3. Click **New Analysis**.
4. The first three columns of your report must be the columns given in the following tables by report:

   o **Credits**

<table>
<thead>
<tr>
<th>Subject Area</th>
<th>Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incentive Compensation - Credits Real Time</td>
<td>Calculation Currency Credit Amount under Credit Transaction.</td>
</tr>
<tr>
<td>Incentive Compensation - Credits Real Time</td>
<td>Calculated Currency Code under Credit Transaction Details</td>
</tr>
<tr>
<td>Incentive Compensation - Credits Real Time</td>
<td>Source Transaction Event Date under Credit Transaction Details</td>
</tr>
</tbody>
</table>

   o **Earnings**

<table>
<thead>
<tr>
<th>Subject Area</th>
<th>Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incentive Compensation - Earnings Real Time</td>
<td>Earning Amount under Earning Transaction</td>
</tr>
<tr>
<td>Incentive Compensation - Earnings Real Time</td>
<td>Calculated Currency Code under Earning Transaction Details</td>
</tr>
<tr>
<td>Incentive Compensation - Earnings Real Time</td>
<td>Event Date under Earning Transaction Details</td>
</tr>
</tbody>
</table>

   o **Payments**
<table>
<thead>
<tr>
<th>Subject Area</th>
<th>Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incentive Compensation - Payments Real Time</td>
<td>Payment Amount in Home Currency under Payment Transaction</td>
</tr>
<tr>
<td>Incentive Compensation - Payments Real Time</td>
<td>Pay Currency Code in Payment Transaction Details</td>
</tr>
<tr>
<td>Incentive Compensation - Payments Real Time</td>
<td>Pay Date in Payment Transaction Details</td>
</tr>
</tbody>
</table>

5. For the first column in the report, add the dollar symbol ($) at the end of the column heading, with no space between.
6. Add other columns to your report.
7. You must create two filters for the report as follows. Mark the Operator for the filters as is prompted.
   - Credits
     - The Participant column under Credited Participant Details which is under Credit Transaction Details
     - The Period column under Calendar
   - Earnings
     - The Participant column under Participant
     - The Period column under Calendar
   - Payments
     - The Participant column under Participant
     - The Pay Date column under Payment Transaction Details
8. You can add additional filters.
9. When you save, the report name must be one of the following:
   - Credits
   - Earnings
   - Payments

Customizing the Performance Report

To customize the performance report:

1. Navigate to Reports and Analytics under Tools.
2. Open Shared Folders/Custom/Incentive Compensation. Your custom reports must be in this folder.
3. Click New Analysis.
4. The columns for the performance report must be the following:

<table>
<thead>
<tr>
<th>Subject Area</th>
<th>Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incentive Compensation - Participant Period Goals Real Time</td>
<td>Description under Performance Measure</td>
</tr>
</tbody>
</table>
5. Add the Unit of Measure column under Performance Measure a second time for the fourth column, as shown in the table. You can’t add other columns to this report.

6. In the Selected Columns region, select the Column Settings icon for the new Unit of Measure column.

7. Select **Edit formula** from the list.

8. Replace the text in the **Column Formula** box with `DESCRIPTOR_IDOF("Incentive Compensation - Participant Period Goals Real Time"."Performance Measure"."Unit Of Measure")`

9. You must create two filters for the report as follows. Mark the Operator for the filters as **is prompted**.
   - The Participant column under Participant
   - The Period column under Calendar

10. You can add additional filters.

11. Save this report with the name **Performance** in the **Shared Folders/Custom/Incentive Compensation** directory.

### Creating a Custom Report

You can use any analysis as a custom report in Mobile Commissions. The analysis does not have specific column requirements. To create the custom report:

1. Create the analysis and save it anywhere.
2. Select the analysis and click **Edit**.
3. Select the Advanced tab.
4. Copy the URL for the report from the address in your browser.
5. Open Shared Folders, Custom, Incentive Compensation. Your custom reports must be in this folder.
6. Click **New Analysis**.
7. Select any Incentive Compensation subject area.
8. Select any column and drag it to the main pane.
9. In the **Column Formula** field, paste the URL you copied in step 4 and surround it with single quotes.
10. Click **OK**.
11. Save this report with the name **Custom Report** in the **Shared Folders/Custom/Incentive Compensation** directory.

To test your custom report:

1. Sign in to the mobile application as a participant.
2. Open the new Custom Report tab.
# External Integration

## Web Services: Overview

Use web services to integrate web-based applications into your Oracle Applications Cloud. Web services expose business objects and processes to other applications through the use of open standards-based technologies.

The web services support development environments and clients that comply with the following open standards:

- Extensible Markup Language (XML)
- Simple Object Access Protocol (SOAP)
- Business Process Execution Language (BPEL)
- Web Services Description Language (WSDL)
- XML schema definitions (XSD)

Oracle Applications Cloud includes two types of web services:

- Application Development Framework (ADF) services
- Composite services

The following table describes the two types.

<table>
<thead>
<tr>
<th>Web Service Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADF services</td>
<td>ADF services usually represent business objects, such as employees or purchase orders. ADF services typically expose standard operations, such as create, update, and delete. However, for locally-persisted objects, ADF services are not limited to these operations. Examples of ADF services include:</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>Worker.changeHireDate</strong> - a service that updates the hire date of the worker business object.</td>
</tr>
<tr>
<td></td>
<td>• <strong>ProjectTask.createTask</strong> - a service that adds a task to the project task business object.</td>
</tr>
<tr>
<td>Composite services</td>
<td>Composite services usually represent end-to-end business process flows that act on business events produced by the ADF services. Composite services orchestrate multiple object-based services, rules services, and human workflows. Examples of composite services include:</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <strong>ProjectStatusChangeApproval.process</strong> - a service that accepts the change in project status.</td>
</tr>
<tr>
<td></td>
<td>• ScheduleOrchestrationOrderFulfillmentLineService.scheduleOrders - a service that schedules resources used to fulfill an order.</td>
</tr>
</tbody>
</table>

For more information about web services, see the SOAP Web Services guide for your cloud services.
Files for Import and Export

Files for Import and Export: Explained

You can import data into or export data out of the applications. A repository stores the content and the import and export processes handle the data movement into and out of the repository. Integration specialists stage data for import and export. Application administrators run processes to import data in repositories of content to application transaction tables, or retrieve data exported from applications.

Aspects of managing files for import and export involve the following:

- Using the File Import and Export page
- Interacting with content management
- Uploading to facilitate import
- Downloading to facilitate export
- Determining the file size

The File Import and Export Page

Use the File Import and Export page to upload content to or download content from the document repository of Oracle WebCenter Content. Search criteria on the page are limited to the minimum metadata of content management records needed for file import and export. To open the page, from the Navigator menu in the global area, select Tools - File Import and Export.

Contact the WebCenter Content Administrator for the following additional requirements:

- Information or assistance regarding general access to content management (including all metadata)
- Creating and managing accounts
- Programmatically uploading and downloading content

Interacting with Content Management

Each user with access to the File Import and Export page is assigned to one or more accounts in Oracle WebCenter Content. Accounts organize and secure access to the content items.

Uploading to Facilitate Import

Uploading a file creates a record in Oracle WebCenter Content. When you upload a file, you must also specify an account to which you upload the file. The account you specify determines which import process picks up that file to import it. You can upload any compatible file format, such as MIME, which the content repository can parse. However, the uploaded format must conform to the requirements of the import process. For example, the comma-separated values (CSV) file for the Load Interface File for Import process.
Downloading to Facilitate Export
Records in the search results table of the File Import and Export page provide download links to the files.

File Size
Upload and download don’t apply the following by default:

- Data compression
- File splitting

The `UPLOAD_MAX_DISK_SPACE` parameter in the `web.xml` file determines the maximum allowable file size in content management. The default maximum size is 10240000 (10MB).

Files for Import and Export: Points to Consider
Interaction between the File Import and Export page and Oracle WebCenter Content requires securing content in an account. You can use the predefined accounts that are available in Oracle WebCenter Content.

Areas of file import and export involve the following:

- Defining security
- Searching records
- Accessing content in a new account
- Naming the account
- Deleting files

Defining Security
You require the File Import and Export Management duty role for accessing the File Import and Export page. This duty role is included in the predefined role hierarchy for integration specialist roles and product family administrator roles. Files in Oracle WebCenter Content are associated with an account so that only users having access to that account can work with those files. Account names are unique and each account is treated as discrete by access control. You can only upload and download files to and from content repositories that are linked to the accounts you can access. The underlying integrated content management handles security tasks such as virus scanning.

Searching Records
A record in Oracle WebCenter Content contains the metadata used for accessing the file. When a scheduled process is run on a file, the record for the file is assigned a process ID.

Accessing Content in a New Account
After you create a new account in Oracle WebCenter Content, restart the content server. Otherwise, when you use the File Import and Export page to access content in the new account, you may experience a delay. That’s because the policy store is being updated with the new account information.

Naming the Account
If you create custom accounts for importing or exporting data, use the following conventions for naming the account:

- Don’t include a forward slash (/) at the beginning or end.
• End the name with a dollar symbol ($) to avoid partial string matching.
• Use ($) as a separator in the hierarchical structure.

For example: `fin$/journal$/import$` The File Import and Export page transforms account names by removing the $ separators. For example `fin$/journal$/import$` appears as `fin/journal/import`. The Remote Introdoc Client (RIDC) HTTP command-line interface (CLI) transforms the account name you specify without the $ symbol to one that includes the symbol. For example, `fin/journal/import` becomes `fin$/journal$/import$` in WebCenter Content.

Deleting Files

You can delete one file at a time when you use the File Import and Export page. To delete multiple files simultaneously from the content repository, use the standard service page in Oracle WebCenter Content.

External Data Integration Services for Oracle Cloud

External Data Integration Services for Oracle Cloud: Overview

Use External Data Integration Services for Oracle Cloud to load data into Oracle Fusion Applications from external sources, such as legacy systems and third-party applications.

External Data Integration Services for Oracle Cloud include the following components:

• Templates to structure, format, and generate the data file according to the requirements of the target application tables.
• File-based load process to load the data files into the interface tables.
• Application-specific data import processes to transfer data from interface tables to the application tables in your Oracle Fusion Applications.
The following flow diagram outlines the steps involved in the process:

For further information, see Using External Data Integration Services for Oracle ERP Cloud (2102800.1) on My Oracle Support at https://support.oracle.com.

**Related Topics**
- Using External Data Integration Services for Oracle ERP Cloud

**Locating File Import Templates: Explained**

The File Based Data Import guides in the Oracle Help Center (http://docs.oracle.com) include integration templates to help you prepare external data for loading and importing. Each template includes table-specific instructions, guidelines, formatted spreadsheets, and best practices for preparing the data file for upload. Use the templates to ensure that your data conforms to the structure and format of the target application tables.

Preparing external data using templates involve the following tasks:
- Downloading templates
- Preparing data using the XLS template
**Downloading Templates**

To download the templates:

1. Open the File Based Data Import guide for your cloud service.
2. Locate the import process.
3. View the list of files.
   - Control files describe the logical flow of the data load process.
   - XLSM templates include the worksheets and macros for structuring, formatting, and generating your data file.

\[ Note: \] You can use XML templates to import data into Oracle Data Integrator.

4. Click the template link in the File Links table to download the file. For example, click `JournalImportTemplate.xlsm` in the Journal Import topic.

**Preparing Data Using the XLS Template**

To prepare your data in a spreadsheet format:

1. Open the XLS template. The first worksheet in each file provides instructions for using the template.

\[ Note: \] If you don’t follow the instructions, you’ll get data load errors and data import failures.

2. Save the file.
3. Click the Generate CSV File button.

The macro generates a comma-separated values (CSV) file and compresses the file into a ZIP file. You must transfer the ZIP file to the content management server.

**Opening the XML Template**

To prepare your data in Oracle Data Integrator, download the XML templates using the following steps:

1. Import the family-level template as a model folder.
2. Import the product-level template as a model folder within the family-level model folder.
3. Import the product template as a model within the product-level model folder.
4. Create the integration project.
5. Create the package.
6. Add and configure these elements:
   - Integration projects
   - Content management document transfer utility
7. Execute the package. The package generates the CSV file and compresses it into a ZIP file.
Using XML Templates to Generate Data Files for Integration: Explained

The File Based Data Import guides in the Oracle Help Center (https://docs.oracle.com) include XML integration templates that you use with Oracle Data Integrator to generate import files from your external data. Oracle Data Integrator provides a solution for integrating complex data from a variety of sources into your Oracle Fusion applications.

To use the XML templates and generate the import files, you must:

- Install and set up Oracle Data Integrator
- Create source and target models
- Create integration projects

**Note:** For Oracle Cloud implementations, you must upload the ZIP file to the content management repository in Oracle Cloud. For non-Cloud implementations, you can streamline the data integration process by installing the content management document transfer utility, which uses Oracle Data Integrator to transfer the ZIP file.

Using Excel Integration Templates to Generate Data Files: Points to Consider

The File Based Data Import guides in the Oracle Help Center (http://docs.oracle.com) include integration templates to help you prepare external data for loading and importing. Each template includes table-specific instructions, guidelines, formatted spreadsheets, and best practices for preparing the data file for upload. Use the templates to ensure that your data conforms to the structure and format of the target application tables.

**Template Structure**

The integration templates include the following characteristics:

- Each interface table is represented by a separate worksheet.
- Each interface table field is represented by a worksheet column with a header in the first row.
- Each column header contains bubble text or comments that include details about the column, such as the expected data type, length, and, in some cases, other instructional text.
- Columns are formatted, where applicable, to match the target field data type to eliminate data entry errors. The worksheet columns appear in the order that the control file processes the data file.

For more information on the template structure, see the Instructions and CSV Generation worksheet in the template.

**Template Requirements**

To minimize the risks of an unsuccessful data load, ensure the following:

- Unused columns can be hidden, but not reordered or deleted.

**Caution:** Deleting or reordering columns causes the load process to fail and results in an unsuccessful data load.
External data must conform to the data type accepted by the control file and process for the associated database column.

- Date column values must appear in the YYYY/MM/DD format.
- Amount column values can't have separators other than a period (.) as the decimal separator.
- Negative values must be preceded by the minus (-) sign.
- Column values that require whole numbers include data validation to allow whole numbers only.
- For columns that require internal ID values, refer to the bubble text for additional guidance about finding these values.

After you finish preparing the data in the sheet, click the **Generate CSV File** button to generate a ZIP file containing one or more CSV files.

### Using XML Integration Templates to Generate Data Files: Points to Consider

Use XML templates in Oracle Data Integrator to prepare your external data for the load and import process.

The File Based Data Import guides in the Oracle Help Center (https://docs.oracle.com) include three types of XML templates that you import as target models in your Oracle Data Integrator repository:

- Family level
- Product level
- Product

#### Family-Level XML Files

A family-level XML file is common to a group of product-level model folders and product models.

Consider the following points when you use family-level XML files:

- Use the family-level XML file to support assets in the family, for example, Oracle Fusion Financials or Human Capital Management.
- Import the family-level XML file into your Oracle Data Integrator repository prior to importing the other XML files.
- Import one family-level XML file as a model folder for each family of products.
- Import each family-level XML file as a top-level model folder.
- Import the family-level XML file one time; it supports all subsumed product-level model folders.
- Select Synonym Mode Insert Update as the import type.

#### Product-Level XML Files

A product-level XML file is common to a group of product models.

Consider the following points when you use product-level XML files:

- Use the product-level XML file to support assets in the product line, for example, Fixed Assets, General Ledger, or Payables.
- Import one product-level XML file as a model folder for each line of products.
- Import the product-level XML file as a model folder into your Oracle Data Integrator repository.
- Import the family-level XML file before you import product XML files.
• Import each product-level XML file as a mid-level model folder within the appropriate family-level model folder.
• Import the product-level XML file one time; it supports all subsumed product models.
• Select Synonym Mode Insert Update as the import type.

Product XML Files
A product XML file represents a specific interface table asset.

Consider the following points when you use product XML files:
• Import one product XML file as a model for each interface table or set of tables, for example, Mass Additions.
• Import the product XML file as a model into your Oracle Data Integrator repository after you import the product-level XML file.
• Import each product XML file as a model within the appropriate product-level model folder.
• Import each product XML file one time. The model is based on File technology.
• Select Synonym Mode Insert Update as the import type.
• After you import the product model, connect the model to the correct logical schema.

Creating Integration Projects That Generate Data Files for Import: Points to Consider

When you use Oracle Data Integrator (ODI) to generate the import data files from external data sources, you must configure an integration project. Integration projects are collections of ODI components that provide the procedural details of an integration from a source to a target. The source is your external data and the target is the import data file that you load and import into your Oracle Fusion Applications.

To create your integration project, you configure the following components:
• Knowledge modules
• Integration interfaces

Knowledge Modules
Knowledge modules contain the information that Oracle Data Integrator requires to perform a specific set of tasks against a specific technology or set of technologies. For example, check knowledge modules ensure that constraints on the sources and targets are not violated, and integration knowledge modules load data to the target tables.

Consider the following points about knowledge modules:
• Knowledge modules that you import into your integration project depend on the source and target technologies, as well as other integration-specific rules and processes.
• Multiple types of knowledge modules exist in ODI.
• Use the SQL File to Append module to create the import data file.

Integration Interfaces
Integration interfaces contain the sets of rules that define the loading of data from one or more sources to the target.

Consider the following points about integration interfaces:
• The source is the data store from your external data model.
• The target is the interface table data store, which is the CSV file from your interface table model.
• After you set up the source and target data stores, map the target fields to the source fields, or map source field values to target fields or constants.

Transferring Data Files to Oracle WebCenter Content Using Manual Flow: Explained

After you generate the ZIP file that contains the CSV data import file, transfer the ZIP file to the content repository. Use any of the following methods to transfer file:

• File Import and Export page in Oracle Fusion Applications: Manual flow
• Oracle Fusion ERP Integration web service: Automated flow

Aspects of transferring data files to content management involve the following:

• Target accounts
• Accessing transferred content

Predefined Target UCM Accounts

You can transfer data files to predefined accounts in the Universal Content Management server that correspond to the interface table or assets.

To find the UCM account:

1. Open the File Based Data Import guide for your cloud service.
2. Locate your respective import process. For example, Journal Import.
3. View the UCM account in the Details section.

For more information, see the following guides in the Oracle Help Center (https://docs.oracle.com):

• SOAP Web Services guide for your cloud services
• File Based Data Import guide for your cloud services

Document Transfer Utility: Explained

The WebCenter Content Document Transfer Utility for Oracle Fusion Applications is a feature-set Java library that provides programmatic access to the content repository. Use the utility to import and export documents, such as import files that contain external data that you want to load into interface and application tables.

The library includes:

• Oracle WebCenter Content client command line tool
• Oracle Data Integrator (ODI) upload and download tools
• Oracle WebCenter Content remote intradoc client (RIDC)
• Oracle HTTPClient
• Oracle Fusion Applications branding and defaults

Options for the WebCenter Content Document Transfer Utility for Oracle Fusion Applications fall into these categories:

• DownloadTool program options
DownloadTool Program Options
This table describes the download tool program options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>url</td>
<td>Protocol-specific connection URL of content server</td>
</tr>
<tr>
<td>username</td>
<td>Username to leverage</td>
</tr>
<tr>
<td>password</td>
<td>Password, supplied in command line</td>
</tr>
<tr>
<td>passwordFile</td>
<td>Password, supplied in text file on the first line of the file</td>
</tr>
<tr>
<td>dID</td>
<td>ID of document revision to download</td>
</tr>
<tr>
<td>dID</td>
<td>dID is unique across repository</td>
</tr>
<tr>
<td>dID</td>
<td>dID changes with each revision</td>
</tr>
<tr>
<td>dDocName</td>
<td>Content name</td>
</tr>
<tr>
<td>dDocName</td>
<td>Multiple revisions of a document can share the same dDocName value, otherwise it is unique.</td>
</tr>
<tr>
<td>RevisionSelectionMethod</td>
<td>Revision to download</td>
</tr>
<tr>
<td>RevisionSelectionMethod</td>
<td>Valid values: Latest, LatestReleased</td>
</tr>
<tr>
<td>RevisionSelectionMethod</td>
<td>Default value: Latest</td>
</tr>
<tr>
<td>outputFile</td>
<td>Path and name of local file to write</td>
</tr>
</tbody>
</table>

Note: Alternatively, specify the dDocName and RevisionSelectionMethod to identify the dID to leverage.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>dDocName</td>
<td>Content name</td>
</tr>
<tr>
<td>dDocName</td>
<td>Multiple revisions of a document can share the same dDocName value, otherwise it is unique.</td>
</tr>
<tr>
<td>RevisionSelectionMethod</td>
<td>Revision to download</td>
</tr>
<tr>
<td>RevisionSelectionMethod</td>
<td>Valid values: Latest, LatestReleased</td>
</tr>
<tr>
<td>RevisionSelectionMethod</td>
<td>Default value: Latest</td>
</tr>
<tr>
<td>outputFile</td>
<td>Path and name of local file to write</td>
</tr>
</tbody>
</table>

Here you see a sample download invocation command:

```
java -classpath "oracle.ucm.fa_client_11.1.1.jar" oracle.ucm.client.DownloadTool
url=http://ucmserver.com:16200/cs/idcplg username=weblogic password=we1com3i
dID=21537 outputFile="/tmp/output.doc"
```

Here you see sample output:

```
Oracle WebCenter Content Document Transfer Utility
Oracle Fusion Applications
Copyright (c) 2013, Oracle. All rights reserved.
Performing download (GET_FILE) ...
```
UploadTool Program Options
This table describes the upload tool program options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>url</td>
<td>Protocol-specific connection URL of content server</td>
</tr>
<tr>
<td>username</td>
<td>Username to leverage</td>
</tr>
<tr>
<td>password</td>
<td>Password, supplied in command-line</td>
</tr>
<tr>
<td>passwordFile</td>
<td>Password, supplied in text file on the first line of the file</td>
</tr>
<tr>
<td>primaryFile</td>
<td>Fully-qualified path of local primary file to upload</td>
</tr>
<tr>
<td>dDocAccount</td>
<td>Destination account</td>
</tr>
<tr>
<td>dDocTitle</td>
<td>Document title</td>
</tr>
<tr>
<td>checkout</td>
<td>If uploading a document revision, check out the document from the repository before uploading the revision</td>
</tr>
<tr>
<td></td>
<td>Valid values: true, false</td>
</tr>
<tr>
<td></td>
<td>Default value: false</td>
</tr>
<tr>
<td>ignoreCheckoutErrorNeg22</td>
<td>Ignore error -22 (user has already checked-out the document) when checking-out the document.</td>
</tr>
<tr>
<td></td>
<td>Valid values: true, false</td>
</tr>
<tr>
<td></td>
<td>Default value: true</td>
</tr>
</tbody>
</table>

Here you see a sample upload invocation command:

```
java -classpath "oracle.ucm.fa_client_11.1.1.jar" oracle.ucm.client.UploadTool
url=http://ucmserver.com:16200/cs/idcplg username=weblogic password=we1com3i
primaryFile="/tmp/resume.doc" dDocTitle="Resume of MSMITH" -dDocAccount=/acme/sales
```

Here you see sample output:

```
Oracle WebCenter Content Document Transfer Utility
Oracle Fusion Applications
Copyright (c) 2013, Oracle. All rights reserved.
Performing upload (CHECKIN_UNIVERSAL) ...
Upload successful.
[dID=21537 | dDocName=UCMFA021487]
```

Debugging and Silent Invocation Options
This table describes the usable options which are common to all tools.
### Option Description

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>verbose</td>
<td>Verbose output</td>
</tr>
<tr>
<td></td>
<td>Log filled with Request/ Response DataBinders</td>
</tr>
<tr>
<td>quiet</td>
<td>Minimal output</td>
</tr>
<tr>
<td>version</td>
<td>Print tool revision or version</td>
</tr>
<tr>
<td>log_file_name</td>
<td>Send program output to specified log file instead of the System.out log file</td>
</tr>
<tr>
<td>log_file_append</td>
<td>Append log to existing log file rather than overwrite it</td>
</tr>
<tr>
<td></td>
<td>Valid values: true, false</td>
</tr>
<tr>
<td></td>
<td>Default value: false</td>
</tr>
<tr>
<td>socketTimeout</td>
<td>Override time out of socket</td>
</tr>
<tr>
<td></td>
<td>Specify override time in seconds</td>
</tr>
</tbody>
</table>

You can use the tools to test the connection. Provide only the url, username, and password as you see in this sample test:

```java
java -classpath "oracle.ucm.fa_client_11.1.1.jar" oracle.ucm.client.DownloadTool
url=http://ucmserver.com:16200/cs/idcplg username=weblogic password=we1com3i
```

Here you see the sample output:

```
Oracle WebCenter Content Document Transfer Utility
Oracle Fusion Applications
Copyright (c) 2013, Oracle. All rights reserved.
Performing connection test (PING_SERVER) ...
Connection test successful.
```

### Load Interface File for Import Process

Use to load external setup or transaction data from a data file in the content repository to interface tables. The process prepares the data for import into application tables.

You run this process from the Scheduled Processes page. You can run it on a recurring basis.

Before running this process, you must:

1. Prepare your data file.
2. Transfer the data file to the content repository.

#### Parameters

**Import Process**

Select the target import process.

**Data file**
Enter the relative path and the file name of the *.zip data file in the content repository.

Importing Data into Application Tables: Procedure

The final destination for your external data is the application data tables of your Oracle Fusion application. Importing data into application tables involves the following:

- Loading data into interface tables
- Finding and submitting the import process

Loading Data into Interface Tables

Interface tables are intermediary tables that store your data temporarily while the application validates format and structure. Run the Load Interface File for Import scheduled process to load data from the data file into the interface table that corresponds to the template that you use to prepare the data.

To load your data into interface tables, submit the Load Interface File for Import scheduled process using the following steps:

1. From the Navigator, click Tools.
2. Click Scheduled Processes.
3. Click the Schedule New Process button.
4. Search and select the Load Interface File for Import job.
5. On the Process Details page:
   a. Select the target import process.
   b. Enter the data file name.
6. Submit the process.

If the process is successful, the status is SUCCEEDED and the process populates the interface tables. If the process isn’t successful, the status is ERROR.

Note: The data file remains in the content repository after the process ends.

Finding and Submitting the Import Process

Run the appropriate import process to import the data into the interface tables of your Oracle Fusion application.

To import your data into the application tables:

1. From the Navigator, click Tools.
2. Click Scheduled Processes.
3. Click the Schedule New Process button.
4. Search and select the import process for the target application tables.
5. On the Process Details page, select the process that corresponds to the data that you’re importing. For example, Journal Import.
   If you prepared your data using the spreadsheet template, select the process shown in the Overview section of the spreadsheet.
6. Submit the process.

If the process is successful, the status is SUCCEEDED. The data in the interface tables is validated and the successful records are imported into the Oracle Fusion application tables. If the process isn’t successful, the status is ERROR.
Note: For more information on the process used for data prepared using the spreadsheet template, see the Instructions and CSV Generation tab of the spreadsheet template.

Correcting Import Load Process Errors: Explained

The Load Interface File for Import process ends in error if the load of the data file fails on any row. The Load File to Interface child process ends as an error or warning. All rows that were loaded by the process are deleted and the entire batch of records is rejected.

Correcting Data Upload Errors
To correct errors:

1. Review the error logs.
2. Change any structural or formatting anomalies in the data.
3. Generate the ZIP file containing the CSV files using the template.
4. Upload the file to the UCM server and resubmit the Load Interface File for Import process.
5. Repeat these steps until the process successfully loads all the data.

Correcting Import Process Errors
If the import process fails with errors:

1. Review the errors in the import log.
2. Correct the error records using the ADFdi correction spreadsheets.
16 Importing and Exporting Setup Data

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.

Implementation Project Based Export and Import: Explained

Use an implementation project as the source for exporting setup data when you are required to customize the list of tasks or objects you want to export setup data for.

You must explicitly create a configuration package from the Manage Configuration Packages page to export setup data for an implementation project. 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. Depending on your needs, when you create a configuration package based on an implementation project, you can also customize some additional aspects, as explained here.

- Exclude some of the business objects from the configuration you selected to export setup data for.
You should limit to use this option when the corresponding setup data is already available in the target instance and therefore no data dependency issues appear during import.

• Change the default import sequence of the business objects

Change the default import sequence of the business objects. It’s strongly recommended that you limit using this option when you need to correct a data dependency issue and you fully understand the data relationships between the business objects of your configuration.

• Filter the setup data to export

Export
During export, appropriate setup data is identified based on the tasks in the implementation project used as source for the configuration package. The setup data in the configuration package is a snapshot of the data in the source application instance at the time of export. Once export completes, you can download the configuration package file as a zipped archive of multiple XML files, move it to the target application instance, and upload and import it. After exporting the setup data you may continue entering new or modifying existing setup data for your configuration. Since the configuration package is a snapshot of the setup data taken at the time export is initiated, you may need to take another snapshot of the same configuration or set of data later. Although you can always create a different configuration package, FSM provides you the ability to take another snapshot of the setup data using the same customized export and import definition by exporting the configuration package multiple times and creating multiple versions. While the export definition remains the same in each version, the setup data can be different if you modified the data in the time period between the different runs of the export process. Since each version of the configuration package has a snapshot of the data in the source instance, you can compare and analyze various versions of the configuration package to see how the setup data changed.

Import
During import, you first upload a configuration package created by the export process and then import the setup data. All setup data contained in the configuration package is imported into the environment you initiate the setup data import from. In the target application instance, the setup import process inserts all new data from the source configuration package that does not already exist, and update any existing data with changes from the source. Setup data that exists in the target instance but not in source will remain unchanged.

Moving Common Reference Objects

Moving Common Reference Objects: Overview
The common reference objects are used by several setup tasks in the Setup and Maintenance work area. The common reference objects become a part of the configuration package that is created for an implementation project. While moving the application content, for example, moving from test to the production phase of an implementation, attend to the nuances of these common reference objects.

Parameters
The common reference objects are represented as business objects. A single object can be referenced in multiple setup tasks with different parameters. In the configuration package created for the implementation project, parameters passed to
a setup task are also passed to the business objects being moved. As a result, the scope of the setup tasks is maintained intact during the movement.

**Dependencies**

Common reference objects may have internal references or dependencies among other common reference objects. Therefore, you must note all the dependencies before moving the objects so that there are no broken references among them.

**Business Objects for Moving Common Reference Objects: Points to Consider**

Common reference objects in Oracle Fusion Functional Setup Manager are used to move application setup content from one environment to another. For example, from a test environment to a production environment.

**Choice of Parameters**

The following table lists the business objects, the movement details, and the effect of the setup task parameter on the scope of the movement.

> **Note:**
> - You can move only the translations in the current user language.
> - You can move the Oracle Social Network business objects and the Navigator menu customizations using the customization sets on the Customization Migration page.

<table>
<thead>
<tr>
<th>Business Object Name</th>
<th>Moved Functional Item</th>
<th>Effect on the Scope of Movement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Message</td>
<td>Messages and associated tokens</td>
<td>No parameters: All messages are moved.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Parameter moduleType/ moduleKey Only messages belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Parameter messageName/ applicationId Only the specified message is moved.</td>
</tr>
<tr>
<td>Application Taxonomy</td>
<td>Application taxonomy modules and components</td>
<td>No parameters: All taxonomy modules and components are moved.</td>
</tr>
<tr>
<td>Application Attachment Entity</td>
<td>Attachment entities</td>
<td>No parameters: All attachment entities are moved.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Parameter moduleType/ moduleKey Only attachment entities belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</td>
</tr>
<tr>
<td>Application Attachment Category</td>
<td>Attachment categories and category-to-entity mappings</td>
<td>No parameters: All attachment categories and category-to-entity mappings are moved.</td>
</tr>
<tr>
<td>Business Object Name</td>
<td>Moved Functional Item</td>
<td>Effect on the Scope of Movement</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>-----------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Application Document Sequence Category</td>
<td>Document sequence categories</td>
<td>No parameters: All categories are moved. Parameter moduleType/ moduleKey Only categories belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter code/ applicationId Only the specified document sequence category code is moved.</td>
</tr>
<tr>
<td>Application Document Sequence</td>
<td>Document sequences and their assignments</td>
<td>No parameters: All sequences are moved. Parameter moduleType/ moduleKey Only document sequences belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter name: Only the specified document sequence is moved.</td>
</tr>
<tr>
<td>Application Descriptive Flexfield</td>
<td>Descriptive flexfield registration data and setup data</td>
<td>No parameters: All descriptive flexfields are moved. Parameter moduleType/ moduleKey Only descriptive flexfields belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter descriptiveFlexfieldCode/ applicationId Only the specified descriptive flexfield is moved. Importing the metadata of a flexfield can change its deployment status. Therefore, you must redeploy if there are any affected flexfields. The import process automatically submits affected flexfields for redeployment. Also only flexfields with a deployment status of Deployed or Deployed to Sandbox are eligible to be moved.</td>
</tr>
<tr>
<td>Application Extensible Flexfield</td>
<td>Extensible flexfield registration data and setup data, including categories</td>
<td>No parameters: All extensible flexfields are moved. Parameter moduleType/ moduleKey Only extensible flexfields belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved. Parameter extensibleFlexfieldCode/ applicationId Only the specified extensible flexfield is moved. Importing the metadata of</td>
</tr>
<tr>
<td>Business Object Name</td>
<td>Moved Functional Item</td>
<td>Effect on the Scope of Movement</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>----------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Application Key Flexfield</td>
<td>Key flexfield registration data and setup data</td>
<td>No parameters: All key flexfields are moved.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Parameter <code>moduleType/moduleKey</code> Only key flexfields belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Parameter <code>keyFlexfieldCode/applicationId</code> Only the specified key flexfield is moved.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Importing the metadata of a flexfield can change its deployment status and therefore, the affected flexfields must be redeployed. The import process automatically submits affected flexfields for redeployment. Only flexfields with a deployment status of Deployed or Deployed to Sandbox are eligible to be moved.</td>
</tr>
<tr>
<td>Application Flexfield Value Set</td>
<td>Value set setup data</td>
<td>No parameters: All value sets are moved.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Parameter <code>moduleType/moduleKey</code> Only value sets belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Parameter <code>valueSetCode</code>: Only the specified value set is moved.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Importing the metadata of a value set can change the deployment status of flexfields that use the value set. Therefore, you must redeploy if there are any affected flexfields. The import process automatically submits affected flexfields for redeployment.</td>
</tr>
<tr>
<td>Application Reference Currency</td>
<td>Currency data</td>
<td>No parameters: All currencies are moved.</td>
</tr>
<tr>
<td>Application Reference ISO Language</td>
<td>ISO language data</td>
<td>No parameters: All ISO languages are moved.</td>
</tr>
<tr>
<td>Application Reference Industry</td>
<td>Industry data including industries in territories data</td>
<td>No parameters: All industries are moved.</td>
</tr>
<tr>
<td>Application Reference Language</td>
<td>Language data</td>
<td>No parameters: All languages are moved.</td>
</tr>
<tr>
<td>Application Reference Natural Language</td>
<td>Natural language data</td>
<td>No parameters: All natural languages are moved.</td>
</tr>
<tr>
<td>Business Object Name</td>
<td>Moved Functional Item</td>
<td>Effect on the Scope of Movement</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Application Reference Territory</td>
<td>Territory data</td>
<td>No parameters: All territories are moved.</td>
</tr>
<tr>
<td>Application Reference Time zone</td>
<td>Time zone data</td>
<td>No parameters: All time zones are moved.</td>
</tr>
<tr>
<td>Application Standard Lookup</td>
<td>Standard lookup types and their lookup codes</td>
<td>No parameters: All standard lookups are moved.</td>
</tr>
<tr>
<td></td>
<td>Parameter moduleType/moduleKey Only standard lookups belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Parameter lookupType: Only the specified common lookup is moved.</td>
<td></td>
</tr>
<tr>
<td>Application Common Lookup</td>
<td>Common lookup types and their lookup codes</td>
<td>No parameters: All common lookups are moved.</td>
</tr>
<tr>
<td></td>
<td>Parameter moduleType/moduleKey Only common lookups belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Parameter lookupType: Only the specified common lookup is moved.</td>
<td></td>
</tr>
<tr>
<td>Application Set-Enabled Lookup</td>
<td>Set-enabled lookup types and their lookup codes</td>
<td>No parameters: All set-enabled lookups are moved.</td>
</tr>
<tr>
<td></td>
<td>Parameter moduleType/moduleKey Only set-enabled lookups belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Parameter lookupType: Only the specified set-enabled lookup is moved.</td>
<td></td>
</tr>
<tr>
<td>Application Profile Category</td>
<td>Profile categories</td>
<td>No parameters: All profile categories are moved.</td>
</tr>
<tr>
<td></td>
<td>Parameter moduleType/moduleKey Only categories belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>name/applicationId Only the specified category is moved.</td>
<td></td>
</tr>
<tr>
<td>Application Profile Option</td>
<td>Profile options and their values</td>
<td>No parameters: All profile options and their values are moved.</td>
</tr>
<tr>
<td></td>
<td>Parameter moduleType/moduleKey Only profile options and their values belonging to the specified module are moved.</td>
<td></td>
</tr>
</tbody>
</table>
### Business Object Name

<table>
<thead>
<tr>
<th>Moved Functional Item</th>
<th>Effect on the Scope of Movement</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Application Profile Value</strong></td>
<td>Parameter profileOptionName: Only the specified profile option and its values are moved.</td>
</tr>
<tr>
<td>Profile options and their values</td>
<td>No parameters: All profiles and their values are moved.</td>
</tr>
<tr>
<td>Parameter moduleType/moduleKey Only profiles and their values belonging to the specified module are moved.</td>
<td></td>
</tr>
<tr>
<td>Parameter categoryName/categoryApplicationId Only profiles and their values belonging to the specified category are moved.</td>
<td></td>
</tr>
<tr>
<td>Parameter profileOptionName: Only the specified profile and its values are moved.</td>
<td></td>
</tr>
<tr>
<td><strong>Application Reference Data Set</strong></td>
<td>No parameters: All sets are moved.</td>
</tr>
<tr>
<td>Reference data sets</td>
<td></td>
</tr>
<tr>
<td><strong>Application Reference Data Set Assignment</strong></td>
<td>Parameter determinantType: Only assignments for the specified determinant type are moved.</td>
</tr>
<tr>
<td>Reference data set assignments</td>
<td>Parameter determinantType/referenceGroupName Only assignments for the specified determinant type and reference group are moved.</td>
</tr>
<tr>
<td><strong>Application Tree Structure</strong></td>
<td>No parameters: All tree structures (and their labels) are moved.</td>
</tr>
<tr>
<td>Tree structures and any labels assigned to the tree structure</td>
<td>Parameter moduleType/moduleKey Only tree structures (and their labels) belonging to the specified module are moved.</td>
</tr>
<tr>
<td>Parameter treeStructureCode: Only the specified tree structure (with its labels) is moved.</td>
<td></td>
</tr>
<tr>
<td><strong>Application Tree</strong></td>
<td>No parameters: All trees are moved.</td>
</tr>
<tr>
<td>Tree codes and versions</td>
<td>Parameter moduleType/moduleKey Only trees belonging to the specified module are moved.</td>
</tr>
<tr>
<td>Parameter treeStructureCode: Only trees belonging to the specified tree structure are moved.</td>
<td>Parameter TreeStructureCode/TreeCode Only trees belonging to the specified tree structure and tree code are moved.</td>
</tr>
<tr>
<td><strong>Application Tree Label</strong></td>
<td>No parameters: All tree structures (and their labels) are moved.</td>
</tr>
<tr>
<td>Tree structures and any labels assigned to the tree structure</td>
<td></td>
</tr>
<tr>
<td>Business Object Name</td>
<td>Moved Functional Item</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Parameter moduleType/ moduleKey Only</td>
<td>tree structures (and their labels) belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.</td>
</tr>
<tr>
<td>Parameter treeStructureCode: Only the specified tree structure (with its labels) is moved.</td>
<td></td>
</tr>
</tbody>
</table>

**Application Data Security Policy**

- Database resources, actions, conditions, and data security policies

- No parameters: All database resources/actions/conditions/policies are moved.

- Parameter moduleType/ moduleKey Only database resources/actions/conditions/policies belonging to the specified module and its descendant modules in the taxonomy hierarchy are moved.

- Parameter objName: Only the specified database resource along with its actions/conditions/policies is moved.

- If the policies being moved contain reference to newly created roles, move the roles before moving the policies. If the source and target systems use different LDAPs, manually perform the GUID reconciliation after moving the data security policies.

---

**Moving Related Common Reference Objects: Points to Consider**

Certain common reference objects may use other common reference objects creating dependencies among the objects. During the movement of common reference objects, ensure that these dependencies or references aren't broken or lost.

**Dependencies**

The dependencies among the common reference objects may be caused by any of the following conditions.

- Flexfield segments use value sets
- Value sets may make use of standard, common, or set-enabled lookups
- Key flexfields may have an associated tree structure and key flexfield segments may have an associated tree code
- Tree codes and versions may be defined over values of a value set
- Data security policies may be defined for value sets that have been enabled for data security

You may decide to move one, some, or all of the business objects by including the ones you want to move in your configuration package. For example, you may decide to move only value sets, or move both value sets and their lookups as part of the same package. Whatever be the combination, Oracle recommends that during the movement of objects, you follow an order that maintains the dependencies among the objects.

While moving the business objects, adhere to the following order:

1. Move created taxonomy modules before moving any objects that reference them, such as flexfields, lookups, profiles, messages, and so on.
2. Move created currencies before moving any objects that reference them, such as territories.
3. Move created territories before moving any objects that reference them, such as languages and natural languages.
4. Move created ISO languages before moving any objects that reference them, such as languages, natural languages, and industries.
5. Move created tree structures before moving any objects that reference them, such as trees or tree labels.
6. Move created profile options before moving any objects that reference them, such as profile categories or profile values.
7. Move created attachment entities before moving any objects that reference them, such as attachment categories that reference them.

Note: In scenarios where there may be dependencies on other objects, you must move the dependencies before moving the referencing object. For example, if data security policies have dependencies on newly created security roles, you must move the security roles before moving the security policies.

Using Seed Data Framework to Move Common Reference Objects: Points to Consider

To move the common reference objects, you can use the Seed Data Framework (SDF). You can also use the command line interface of SDF to move the object setup data. For more information about seed data loaders including common reference object loaders, see Oracle Fusion Applications Developer’s Guide.

Movement Dependencies

The seed data interface moves only the setup metadata. For example, if you use SDF to import flexfield metadata, the flexfield setup metadata is imported into your database. However, you must initiate the flexfield deployment process separately after seed data import to regenerate the runtime flexfield artifacts in the target environment. Similarly, if you use SDF to import data security metadata, you must first move any new referenced roles and then manually run the GUID reconciliation where required.

To ensure that the reference data is not lost during the movement, certain guidelines are prescribed. It is recommended that you perform the movement of object data exactly in the order given below.

Note: Only the translation in the current user language is moved.
1. Move created taxonomy modules before moving any objects that reference them, such as flexfields, lookups, profiles, attachments, reference data sets, document sequences, messages, and data security.
2. Move created currencies before moving any objects that reference them, such as territories.
3. Move created territories before moving any objects that reference them, such as languages and natural languages.
4. Move created ISO languages before moving any objects that reference them, such as languages, natural languages, and industries.
5. Move created tree structures before moving any objects that reference them, such as trees or tree labels.
6. Move created profile options before moving any objects that reference them, such as profile categories or profile values.
7. Move created attachment entities before moving any objects that reference them, such as attachment categories that reference them.
8. Move created reference data sets before moving any objects that reference them, such as reference data set assignments and set-enabled lookups.
9. Move created document sequence categories before moving any objects that reference them, such as document sequences.
10. Move created tree labels before moving any objects that reference them, such as trees.
11. Move created data security objects and policies before moving any objects that reference them, such as value sets.
12. Move created value sets before moving any objects that reference them, such as flexfields.
13. Move created trees before moving any objects that reference them, such as key flexfields.
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.

**action**
The kind of access, such as view or edit, named in a security policy.

**address style format**
Specifies the layout of an address, such as how many address lines it contains, and whether a city name is mandatory.

**ADF**
Acronym for Application Developer Framework. A set of programming principles and rules for developing software applications.

**analytics**
Business intelligence objects such as analyses and dashboards that provide meaningful data to help with decision making.

**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.

**business intelligence catalog**
The repository where all business intelligence objects, including analytics, reports, briefing books, and agents, are stored. The catalog contains separate folders for personal, shared, and custom objects.

**business object**
A resource in an enterprise database, such as an invoice or purchase order.

**context**
A grouping of flexfield segments to store related information.

**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.

data security
The control of access and action a user can take against which data.

descriptive flexfield
Customizable expansion space, such as fields used to capture additional descriptive information or attributes about an entity, such as a customer case. You may configure information collection and storage based on the context.

determinant
A value that specifies the use of a reference data set in a particular business context.

enterprise
An organization with one or more legal entities under common control.

extensible flexfield
Customizable expansion space used to capture multiple sets of information within a context or multiple contexts. Some extensible flexfields let you group contexts into categories.

external system or external application
A system or application that is external to and not part of Order Management. An order capture system that resides upstream of Order Management is an example of an external system. A fulfillment application that resides downstream of Order Management is an example of an external application.

feature choice
A selection you make when configuring offerings that modifies a setup task list, or a setup page, or both.

flexfield
A flexible data field that you can customize to contain one or more segments or store additional information. Each segment has a value and a meaning.

flexfield segment
An extensible data field that represents an attribute and captures a value corresponding to a predefined, single extension column in the database. A segment appears globally or based on a context of other captured information.
global area
The region at the very top of the user interface that remains the same no matter which page you’re on.

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

import
In the context of data integration, the transfer of data from interface tables to application tables, where the data is available to application users.

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.

infolet
A small, interactive widget on the home page that provides key information and actions for a specific area, for example social networking or your personal profile. Each infolet can have multiple views.

interface table
A database table that stores data during data transfer between applications or from an external system or data file.

Items
Entries within the Product master database. For example, items for a manufacturing company can include nuts, bolts, and screws.

job definition
The metadata that determines what a job does and what options are available to users when they submit the scheduled process. A job is the executable for a scheduled process.

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.
**key flexfield**
Configurable flexfield comprising multiple parts or segments, each of which has a meaning either individually or in combination with other segments. Examples of key flexfields are part numbers, asset category, and accounts in the chart of accounts.

**key flexfield structure**
The arrangement of segments in a key flexfield. In some cases, you can define multiple structures for a single key flexfield.

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

**load**
In the context of data integration, the transfer of external data from data files to the receiving **interface tables** in preparation for an import into application tables.

**lookup code**
An option available within a lookup type, such as the lookup code BLUE within the lookup type COLORS.

**lookup type**
The label for a static list that has lookup codes as its values.

**name style format**
Specifies the layout of a name, such as first name, last name, and phonetic last name.

**Navigator**
The menu in the global area that you can use to open the work areas and dashboards that you have access to.

**offering**
A comprehensive grouping of business functions, such as Sales or Product Management, that is delivered as a unit to support one or more business processes.

**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.

**participant home currency**
Defines which currency to use for each participant.

**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.

**period type**
Is the shortest period range that must be available for incentive compensation processing, for example monthly. Associate the period type with a calendar and define incentive compensation periods, for example, Jan 2015 and Feb 2015, for a calendar based on it.

**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.

**privilege**
A grant of access to functions and data; a single, real world action on a single business object.

**process set**
A scheduled process that contains multiple individual processes or other process sets.

**profile option**
User preferences and system configuration options that users can configure to control application behavior at different levels of an enterprise.

**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.

**report**
An output of select data in a predefined format that’s optimized for printing.

**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.

**sandbox**
A testing environment that isolates untested code changes from the mainline environment so that these changes don’t affect the mainline metadata or other sandboxes.
scheduled process
A program that you run to process data and, in some cases, generate output as a report.

segment
A segment is a single field within a flexfield and maps to a single table column in your database. When customizing a flexfield, you define the appearance and meaning of individual segments.

set
Classified and grouped reference data that organizational entities share.

set enabled
A property that describes entities that an organization shares as reference data. For example, you can indicate a lookup, customer, location, or document attachment as set enabled.

springboard
The grid of icons on the home page or the strip of icons above all simplified pages. Use the icons to open pages.

value set
A set of valid values against which values entered by an end user are validated. The set may be tree structured (hierarchical).

work area
A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.

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.

workflow
An automated process that passes a task from one user (or group of users) to another to view or act on. The task is routed in a logical sequence to achieve an end result.