

Oracle Financial Services Profitability Management Cloud Service Static Table Driver User Guide



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Static Table Driver

Profitability and Balance Sheet Management (PBSM) Cloud Service's Static Table Drivers are declared as drivers in the Driver process tab for allocation rules of the type Static Driver Table.

For more information, see [Allocation Rules](#).

Static Driver Table allocation rules are similar in many ways to Dynamic Driver allocation rules. Both are used to distribute balances, but while Dynamic Driver allocation rules obtain their driver data directly from your business data, Static Driver Table allocation rules obtain their driver data from a Static Table Driver rule.

Topics:

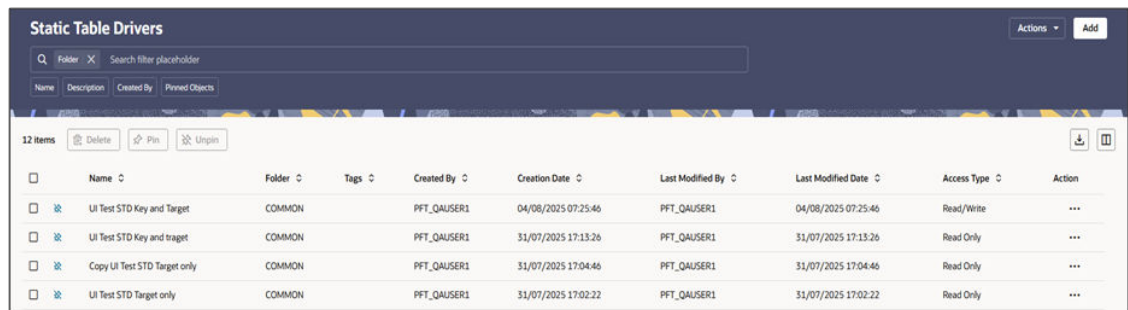
- [Summary and Detail Screens](#)
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1.1 Summary and Detail Screens

To open the summary page, from the LHS menu, select **Profitability Management Cloud Service**, select **Maintenance**, and then select **Static Table Driver**.

A summary screen is displayed showing a set of Static Table Driver rules. Using search criteria, you can control the set of rules that are displayed. When you Add, Edit, or View a rule, a detailed screen is displayed.

Figure 1-1 Static Table Drivers Summary Screen



Name	Description	Created By	Pinned Objects					
12 items [Delete] [Pin] [Unpin] [Download] [Refresh]								
Name	Folder	Tags	Created By	Creation Date	Last Modified By	Last Modified Date	Access Type	Action
<input type="checkbox"/> UI Test STD Key and Target	COMMON		PFT_QAUSER1	04/08/2025 07:25:46	PFT_QAUSER1	04/08/2025 07:25:46	Read/Write	...
<input type="checkbox"/> UI Test STD Key and traget	COMMON		PFT_QAUSER1	31/07/2025 17:13:26	PFT_QAUSER1	31/07/2025 17:13:26	Read Only	...
<input type="checkbox"/> Copy UI Test STD Target only	COMMON		PFT_QAUSER1	31/07/2025 17:04:46	PFT_QAUSER1	31/07/2025 17:04:46	Read Only	...
<input type="checkbox"/> UI Test STD Target only	COMMON		PFT_QAUSER1	31/07/2025 17:02:22	PFT_QAUSER1	31/07/2025 17:02:22	Read Only	...

Navigating in the Summary Screen

When you first navigate to the Static Table Drivers Summary screen, the rules stored within your current default Folder are presented in a summary table. The Static Table Drivers Summary screen has the following panes: Search and Static Table Drivers Summary table. The title bar of the summary page provides several actions for the user. They are:

- **Add:** Click Add icon to build a new rule. The Add icon is disabled if any rows in the table are selected.
- **Actions:** This lists three buttons:
 - **Search:** Click Search to initiate the search action based on the search filters applied.
 - **Reset:** Click Reset to reset the search filters applied.
 - **Help:** Click Help to view the Help Page.

There is a grid bar at the top of the Summary grid that displays three buttons on the left and two buttons on the right. They are, starting from the left to the right:

- **Delete:** Select one or more rules in the table and then click Delete at the top left of the Summary Page to delete more than one rule at the same time.
- **Pin:** Click Pin to pin or set to favorite any object. Users can set selected objects as favorites and these pinned objects always appear at the top in summary screens.
- **Unpin:** Click Unpin to unpin or release any object from the favorites list.
- **Export:** Click Export to download the displayed information in the summary table in .xls format.

Columns: This is a Column Selector button to choose and select the columns that we want to display on the summary screen.

Search

To search the Static Table Drivers, perform the following steps:

1. Click the **Search** icon on the Search pane to collapse (display) the criteria window.
2. Enter the Static Table Driver **Name** or **Description** and click Search to display the Static Table Drivers that match the criteria.
3. Click **Cancel** to remove the filter criteria on the Search Window and refresh the window.
4. Click **Search** after entering the search criteria.
The search results are displayed in a table containing all the Static Table Drivers that meet the search criteria.

Static Table Drivers Summary table

The Static Table Driver pane presents a table containing all Static Table Driver rules that meet your search criteria.

The Static Table Driver Summary page displays the following columns.

- **Name:** Displays the short name of the rule.
- **Folder:** Displays the folder name where the rule is stored.
- **Tags:** Displays the tags associated with the rule.
- **Created By:** Displays the name of the User who created the Rule.
- **Creation Date:** Displays the Date and Time at which the rule was created.
- **Last Modified By:** Displays the name of the User who has done the latest modification in the rule.
- **Last Modified Date:** Displays the Date and Time of the latest modification of the rule.
- **Access Type:** Displays the access type of the rule - Read/Write or Read Only property of a Static Table Driver rule. Only the creator of a rule may change its Access Type.

- **Action:** Displays the list of actions that can be performed on the rule.

The Action column on Static Table Driver Summary page offers the following actions that allow you to perform different functions. The following actions are available for the Static Table Driver rule.

- **View:** Click the View icon to view the contents of a Static Table Driver on a read-only basis as the user is launched into the Static Table Drivers Detail screen in view mode.
- **Edit:** Click the Edit icon to modify a previously saved Static Table Driver as the user is launched into the Static Table Drivers Detail screen in edit mode.
- **Save As:** Click on this option to create a copy of an existing Static Table Driver. The Save As pop-up window allows you to enter the Name, Description, Folder, and Access Type Details for the copy model.
- **Delete:** Click Delete to delete the Static Table Driver you have selected.
- **Check Dependencies:** This action button is to check for any dependency of the selected object with other objects in the application. On click of this action, the Dependent Information window is displayed with the Object Name, Object Type, Object Subtype, and the Version of the dependent objects. The 'Higher Order Dependency' states if the selected object has an upstream objects dependency and is to be treated as the actual dependency of the selected object. While the 'Lower Order Dependency' displays the downstream objects dependency of the selected object. If an object has a Higher Order Dependency, then the object cannot be deleted without removing the dependency first.

You may select or deselect all the Static Table Driver rules in the summary table by clicking the check box in the upper left-hand corner of the summary table directly to the left of the Name column header.

1.2 Navigating in the Detail Screen

Specify the Static Table Driver rule's Name and Description, select a Folder in which the Static Table Driver rule is to be stored, and specify whether you want the Static Table Driver rule to be "Read/Write" or "Read Only" (Access Type). Naming your Static Table Driver rule is required before you can save it. Static Table Driver rule Name does not accept Special characters (&, @, ~, +, Single quote). Default values for Folder and Access Type are stored in Application Preferences for Profitability Management.

Figure 1-2 Static Table Drivers - Details screen

The screenshot displays the 'Static Table Drivers - Details' screen. The main content area contains a form with the following elements:

- Name:** A text input field with a 'Required' label.
- Folder:** A dropdown menu currently showing 'COMMON'.
- Access Type:** Two radio buttons: 'Read Only' (unselected) and 'Read/Write' (selected).
- Description:** A larger text input field.

At the bottom of the form are three buttons: 'Cancel', 'Continue', and 'Save'. On the right side, there is a dark blue sidebar with a list of navigation options: 'Details' (highlighted), 'Dimension Selection', 'Apply Driver Coefficients', and 'Audit Panel'. A search bar at the top of the sidebar shows '1 | 4'.

Static Table Drivers – Dimension Selection

When creating a new Static Table Driver, first define its structure. After a Static Table Driver has been defined, the maintenance is usually limited to updating driver coefficients. The most critical aspects of a Static Table Driver's structural definition are as follows:

- Key Dimensions and Key Dimension values or member ID's
- Target Dimension and Target Dimension values or member ID's
- Static Table Driver Coefficients

Figure 1-3 Static Table Drivers – Dimension Selection tab

You do not need to specify both a Key dimension and a Target dimension, but you must specify at least one of them. That is, you should select a Key or Target dimension while defining a new Static Table rule.

Note

You cannot add or delete the Key or Target dimensions after defining the Static Table Driver (edit mode). You can add or delete the dimension members.

- **Key Leaves:** For both Management Ledger-level and Instrument allocations, Key Leaves perform a lookup function. Rows from the Source of the Allocation rule are joined with the Key dimension values from the Static Table Driver. If an Input Row Leaf value matches a Key dimension value for the first Key dimension dimension specified in the Static Table Driver, the row is checked against the second Key dimension values, and so on. If you find a match for every Key dimension, the row is processed by the Allocation rule. Profitability Management supports a maximum of three Key dimensions.
- **Target dimension:** You can use Target leaves only in allocations that distribute to the Management Ledger-level. You can view the Distribution allocations as first performing a lookup on one or more Key Leaves. When you find a match for each Key dimension, the

matching input row's amount is distributed to all dimension values specified as Target dimension values. This means that data is added to the Management Ledger for each dimension member value specified as a Target dimension value. The leaf values specified in the Allocation rule's Debit use the < Same As Source > macro for all Key dimensions and use the < Same As Table > macro for the Target dimension (very similar to the < Same as Driver > macro used in Dynamic Driver allocation rules).

- **Coefficients:** You must specify coefficient values for every Static Table Driver rule. A part of the coefficient specification process is to enter the values for each distinct combination of each of your Key Leaves and Target Leaves. Where only Key Leaves are used, you must enter values for each distinct combination of each of your Key Leaves.
- **For Static Table Drivers with a Target Dimension:** For a Static Table Driver that uses a Target dimension, you must supply one coefficient value for each distinct combination of each of your Key Leaves and your Target Leaves., Static Table Drivers that use a Target dimension are only supported for Management Ledger allocation rules. Target dimension coefficient values represent distribution statistics. You would typically use these statistics on a Percent-to-Total basis. Static Table Drivers support both the Percent-to-Total method and the Simple method.

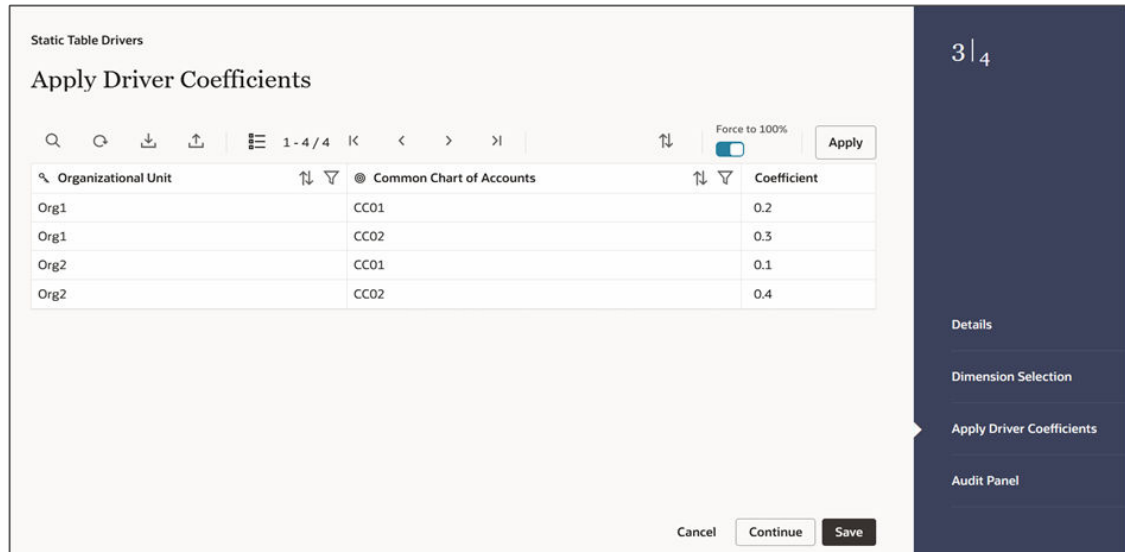
Precede the definition of the Target dimension by the definition of one or more Key dimensions. Key Leaves are never required unless there is no Target dimension defined. When Key Leaves are present, they operate as lookup keys as described above. For a Static Table Driver that uses a Target dimension, the Key leaves function analogously to the Dynamic Driver allocation function of < Match Source & Driver > and the Target dimension functions analogously to the Dynamic Driver allocation function of < Match Driver >.

- **For Static Table Drivers with Key Dimensions But No Target Dimension:** For Static Table Drivers that do not use a Target dimension, you must supply one coefficient value for each distinct combination of each of your Key Leaves. Static Table Drivers that use Key Leaves but do not use a Target dimension can support both distributive Management Ledger allocation rules and Instrument level update rules. For an Instrument level update rule using a Static Table Driver, the Key Leaves function as lookup keys, and the coefficients function as arithmetic factors in updating a target column in an instrument table. For Management Ledger allocation rules, the Key Leaves function analogously to the Dynamic Driver allocation function of < Match Source & Driver >.

Static Table Drivers – Apply Driver Coefficients

Once the Key and Target dimensions have been defined, the next step is to define the coefficients for the cross product of Key and Target dimensions. Click on the Generate Grid button placed at the bottom right corner of the Dimension Selection tab, to generate the matrix for the cross product.

After the matrix is generated, the user is automatically taken to the 'Apply Driver Coefficients' tab that now displays a data entry table. Assign the coefficients to combinations of Key dimension values and Target dimension values.

Figure 1-4 Static Table Drivers – Apply Driver Coefficients Tab

More details on this tab is given in the section Defining Coefficient Values.

Audit Panel

The Audit Panel is a standard footer pane for every PBSMCS rule type. The Audit Panel displays the following sections – Audit, Comments and Tags.

- **Audit Tab:** It shows the audit data for the object. The Audit tab contains details as:
 - Created By
 - Created Date
 - Modified By
 - Modified Date
 - Authorized By
 - Authorized Date
- **Comments Tab:** The Comments panel shows the existing comments for the object. Only the latest comment is editable and deletion of existing comments is not allowed. Users can also add new comments for the current object.
- **Tags Tab:** The Tags panel shows the tag associated with the object. The user can add new tags or remove the existing tags.

1.2.1 Creating a New Static Table Driver – Sample Workflow

This section describes a workflow for defining a Static Table Driver rule.

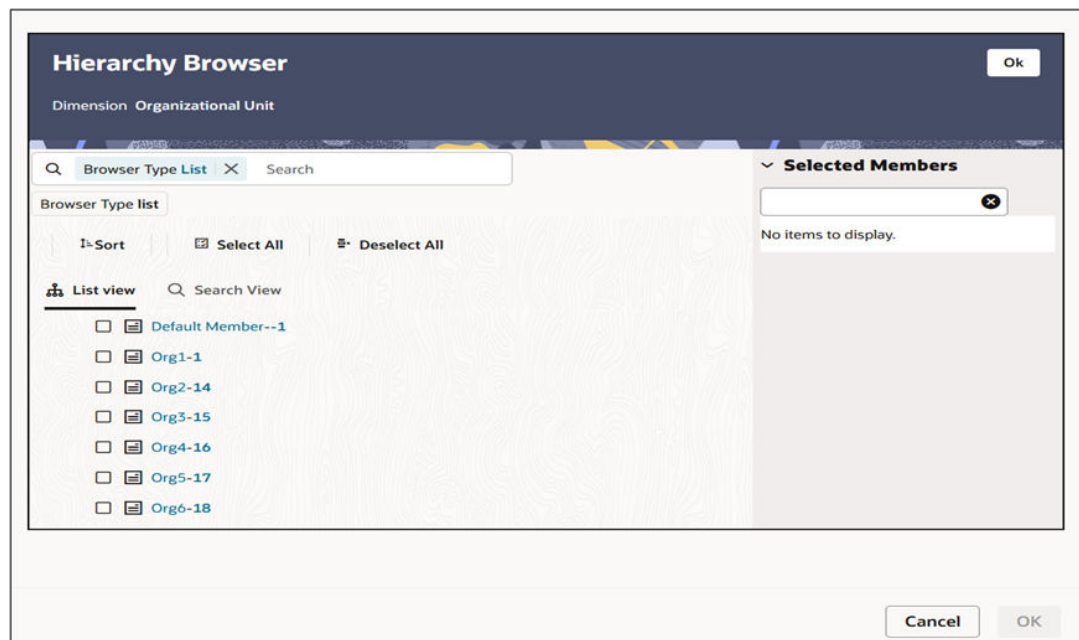
1.2.1.1 Create a New Key dimension

To add a Key dimension, perform the following steps:

1. Navigate to the **Dimension Selection** tab in the Details screen.

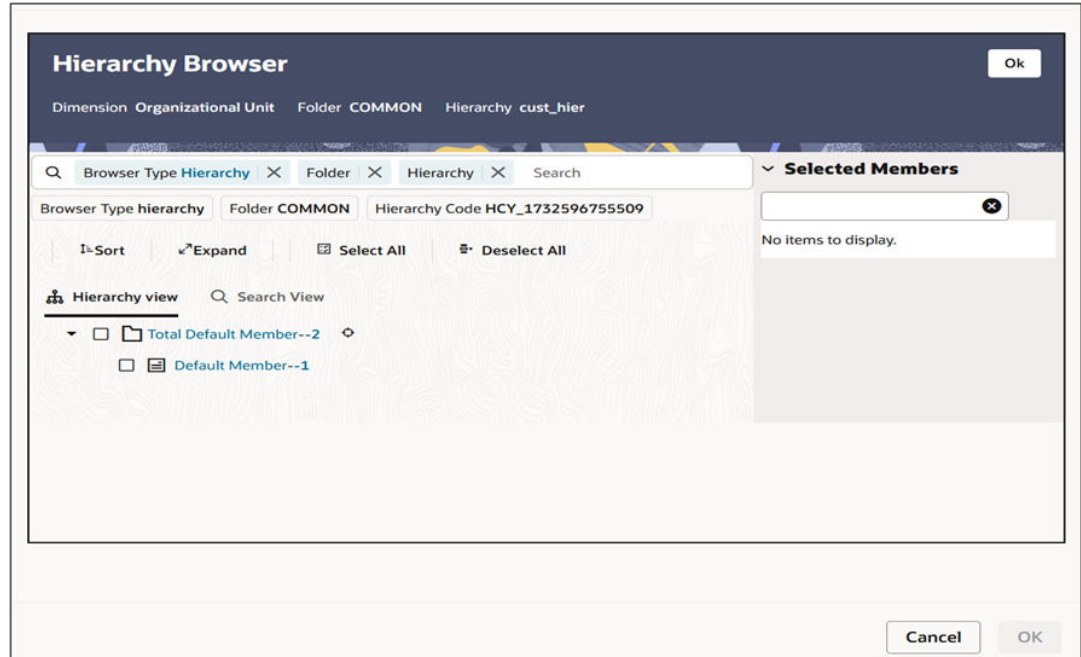
2. In the **Key Dimension** section, select the dimension you want to define as a Key from the drop-down list.
3. Click on the '+' button to add the dimension to the Key Dimension table. The Key dimension is added to the Key Dimension table.
4. Once a Key dimension is added, click the first icon in the **Action** column to invoke the **Hierarchy Browser** that appear adjacent to your selected Key Dimension. The Hierarchy Browser defaults to the **List View** that contains the list of all leaf members for the Key dimension you have chosen. You may scroll up and down to find the leaf member or leaf member you want. You may also search for a dimension member's name (short description) using the Search action button. Search has been revised as an inline search that implicitly comes with wildcard search. This functionality allows you to search a Dimension Member by its ID or Name. Once you have selected the Key dimension values you want, click **OK**.

Figure 1-5 Organizational Unit Hierarchy Browser – List View



5. You may also define Key dimension values to be rollup members within a hierarchy. To select hierarchy rollup point members, click on **Hierarchy View** near the top right of the browser window and then search for the hierarchy you wish to use. After the browser window displays your chosen hierarchy, navigate into the hierarchy until you have found the rollup points you want. Select the value or values you want and click **OK**.

Figure 1-6 Organizational Unit Hierarchy Browser – Hierarchy View



6. After you have clicked **OK** within the Hierarchy Browser window, that window closes and you are directed back to the **Dimension Selection** tab. If you re-open the Hierarchy Browser, it shows the already selected members as checked. You may now repeat this process to add a second or third Key dimension if desired. If you do not need any additional Key dimensions, you may proceed to either of the following:
 - Adding a Target dimension
 - Providing coefficients for your chosen Key dimension value(s).
7. If you want to view the members selected for a Key Dimension, you can click on the icon in the **Members** column that appears adjacent to your dimension member ID values. This feature also gives you the facility to delete any selected member without going through the Hierarchy Browser way.

Figure 1-7 Members Browser

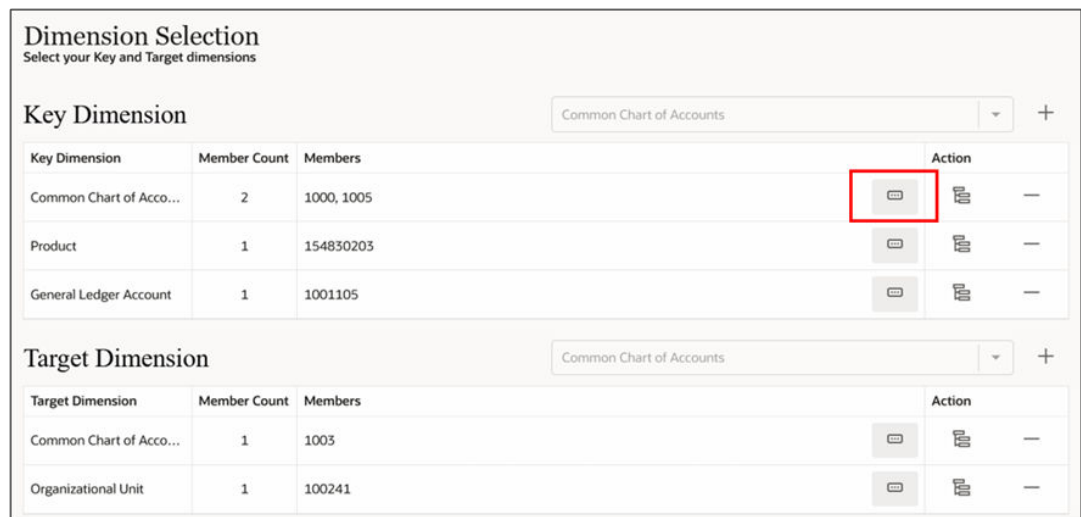


Figure 1-8 Members Browser – Show members window

Member Id	Member Name
1000	Off Balance Sheet Account Type-200
1005	Off Balance Sheet Account Type-205

Note

When you select hierarchy, rollup points, all of the members, you select must come from the same level within the underlying hierarchy. Hierarchy Filters, which may include leaves and rollup nodes from different levels within a hierarchy, are not supported in Static Table Driver rules.

Use Target Leaves only in Allocations that distribute to the Management Ledger.

1.2.1.2 Creating a New Target dimension

To add a Target dimension, perform the following steps:

1. Navigate to the **Dimension Selection** tab in the Details screen.
2. In the **Target Dimension** section, select the dimension you want to define as a Target from the drop-down list.
3. Click on the '+' button to add the dimension to the Target Dimension table. The Target dimension is added to the Target Dimension table.
4. Once a Target dimension is added, click the first icon in the Action column to invoke the **Hierarchy Browser** that appears adjacent to your selected Target Dimension.
5. Select the Target dimension values (the selection process is identical to the process of selecting Key dimension values described above) from the Hierarchy Browser and click **OK**.
6. After you have clicked **OK** within the **Hierarchy Browser** window, that window closes and you are directed back to the **Dimension Selection** tab of the Detail screen.

However, while the screen still displays your Key dimension values under the Key Dimension section as rows, it now displays your Target dimension values under the Target Dimension section as rows.

1.2.1.3 Defining Coefficient Values

Once the Key and Target dimensions have been defined, the next step is to define the coefficients for the cross product of Key and Target dimensions. Click on the **Generate Grid** button placed at the bottom right corner of the **Dimension Selection** tab, to generate the matrix for the cross product.

After the matrix is generated, the user is automatically taken to the 'Apply Driver Coefficients' tab that now displays a data entry table. Assign the coefficients to combinations of Key dimension values and Target dimension values.

Figure 1-9 Static Table Drivers – Apply Driver Coefficients Tab

Organizational Unit	Common Chart of Accounts	Coefficient
Org1	CC01	0.2
Org1	CC02	0.3
Org2	CC01	0.1
Org2	CC02	0.4

After the coefficients are defined, click **Apply** to apply the changes. You can click on **Dimension Selection** tab to view or edit the Key dimensions and the Target dimensions used. Once the definition is modified, the coefficient matrix needs to be re-generated by clicking the **Generate Grid** button once more.

Select either **Yes** or **No** for the value of the **Force to 100%** allocation method by toggling it **On** or toggling it **Off** respectively. (see the toggle button near the top right of the Definition tab). The default value for **Force to 100%** is **Yes**.

Static Driver Table rules are similar in many ways to Dynamic Driver rules. Select **Yes** for the value of Force to 100% when you want to perform a distribution using non-normalized statistics such as headcount, square footage of occupancy, and so on. If you are using a normalized set of driver statistics (statistics that sum to 1.00 or 100%) or if you are combining activity counts with activity rates, you need not use Force to 100%.

When you use Force to 100% in a Static Table Driver rule, balances are distributed on a percent-to-total basis within each row visible on your Coefficient data entry table. For example, for the above coefficient values, balances are distributed from Company A to Cost Center 1 and Cost Center 2 in proportions of 10% and 90%; and balances would be distributed from Company B to Cost Center 2 and Cost Center 3 in proportions of 40% and 60%.

Click **Save** to validate and save your rule.

Click **Cancel** to close the rule without saving any changes you may have made. This control is only active when you are in Edit mode.

1.2.1.4 Excel Export

Use this feature to export your Static Table Driver data to a spreadsheet. Within the spreadsheet, you can update the coefficient values for any existing Key Target combination. Afterward, you can import your spreadsheet back into Profitability Management Cloud Service.

To export to a spreadsheet, perform the following steps:

1. Navigate to the **Apply Driver Coefficients** tab. Click on the **Export** icon.
2. Open using Excel or save the file with the name and location of your choice.

1.2.1.5 Excel Import

Use the Excel import functionality for adding and editing leaf data in static table drivers.

To import a file, perform the following steps:

1. Navigate to the **Apply Driver Coefficients** tab. Click on the **Import** icon to trigger a File Upload dialog.
2. Browse for the spreadsheet that you want to import.
3. Select the file and click **Open**.
4. Click **Upload File**.

1.2.1.6 Search

The Search option allows you to search the Leaf values that have coefficient values defined on the Static Table Driver Definition page. This functionality works only if the Coefficient option is enabled. You can export this extracted list using the Export functionality.

To perform the search, perform the following steps:

1. Apply Filter to your required column within the Coefficient matrix. You can apply filtering to any number of columns.
2. Click **Search**.
The selected Leaf values that match the filtering conditions are displayed in the grid. You can also export this list using the Export functionality.
3. Click **Reset** to remove the filter.
Reset: The Reset option on the Static Table Driver Definition page removes any coefficient you may have specified, and refreshes the screen. It also allows you to reset the Search on the Static Table Driver Definition page.

Example: For other uses, you may want only a subset of all possible combinations of Key Leaf values and Target Leaf values. For example, you may wish to allocate a series of Management Ledger balances from a cost center to another cost center. If you wanted to allocate balances from Company A to Cost Centers 1 and 2; and if you wanted to allocate balances from Company B to Cost Centers 2 and 3, then the values would be as follows:

- Key Leaf dimension would be Organizational Unit
- Key Leaf values would be Company A and Company B
- Target Leaf dimension would also be an Organizational Unit

- Target Leaf values would be Cost Centers 1, 2, & 3
- Enabled combinations would be A-1, A-2, B-2, and B-3

1.3 Working with Exported Static Table Driver Data

During the initial set up on the Definition tab, a Static Table Driver rule has a set of possible Key ' Target combinations equal to the cross product of each of the Key and Target leaves you have defined for your rule. For example, a Static Table Driver rule having one Key leaf dimension with 10 defined members and one Target leaf dimension with defined 100 members has a total of 1,000 possible Key ' Target combinations. Of these 1,000 possible combinations, you may have defined 75, or 125, or any number coefficient values up to 1,000.

The Excel Export feature exports "active" Key ' Target combinations, which are combinations where you have already established coefficients.

The structure of your exported Static Table Driver depends on how many Key dimensions and Target dimensions are used in your rule. The following example shows an exported data from a Static Table Driver having one Key leaf dimension and one Target leaf dimension with 11 defined coefficients.

Figure 1-10 Sample Illustration of Exported Static Table Driver Definitions

	A	B	C	D	E
1	F0_ID	F0_DESC	T1_ID	T1_DESC	COEFF
2	8100	Executive	8100	Executive	10
3	8100	Executive	8400	Facilities Management	35
4	8100	Executive	8200	Finance Department	60
5	8100	Executive	8300	Human Resources	85
6	8100	Executive	8500	Information Technology Unit	110
7	8400	Facilities Management	8100	Executive	135
8	8400	Facilities Management	8400	Facilities Management	160
9	8400	Facilities Management	8200	Finance Department	185
10	8400	Facilities Management	8300	Human Resources	210
11	8400	Facilities Management	8500	Information Technology Unit	235
12	8200	Finance Department	8100	Executive	260

In this example, the first two columns (F0_ID and F0_DESC) contain the leaf identifiers and descriptions for the Key leaf dimension. For a Static Table Driver having a 2nd and 3rd Key leaf dimension, the exported spreadsheet would include ID's and descriptions for each Key leaf dimension (F0, F1, and F2 represent "from" dimensions, such as Key leaf dimensions, while T1, T2, and T3 represent your first, second, and third Target leaf dimensions).

Updating Exported Static Table Driver Data

You may update the coefficient value for any combination in the spreadsheet (yellow cells in the example above).

Adding New Combinations to Exported Data

The Import Excel functionality does not support for any new rows introduced in the Excel file, meaning the Import functionality does not support for new member combinations of existing Key/Target dimensions. It supports only for the member combination already selected through

the Definition facility in the UI. Any additional rows introduced in the Exported Data will be ignored during the Import.

Validating the Imported Data

On Import, the system validates each row in your spreadsheet. Rows failing validation will not be imported. The validation requirements are as follows:

The spreadsheet structure must match the definition of the rule to which it is being imported. This is not an important restriction because the typical workflow for maintaining a Static Driver Table in a spreadsheet begins with an Export of the rule that you want to edit.

Each Key leaf value and each Target leaf value must be part of the definition of your Static Table Driver rule. In the example above, the Key leaf value of 8200 and the Target leaf value of 8400 must be included in the initial set up of the Static Table Driver rule (on the Definition tab).

Note

You must define a Key ' Target combination on the Static Table Driver Definition tab before you can add that combination to your spreadsheet.

1.4 Large Cross Product Static Table Drivers

Static Table Drivers are generally used in a distributive fashion, and the Static Table Driver user interface is engineered for this typical use case. Some features of the user interface are limited for Static Table Drivers having large numbers of Key leaf values (or node values) in conjunction with large numbers of Target leaf values. For these cases, you must maintain your large Static Table Driver rules using Excel Export/Import functionality.

Limit on Large Cross Products

The Static Table Driver user interface is designed to allow you to specify coefficient values for any combination - or even for every combination - of your Key leaves and Target leaves. For example, a simple Static Table Driver having 50 Key Leaf values (in one Key Leaf dimension) and 100 Target Leaf values (in one Target Leaf dimension) could have as many as 5,000 "active" combinations (that is, combinations for which coefficients are defined). Typically, the number of defined combinations is a small fraction of the number of possible combinations.

The number of possible combinations is determined by the Cartesian product of the number of leaf values in each dimension in your Static Table Driver rule. For example, a Static Table Driver rule having 5,000 Key Leaf values (in one Key Leaf dimension) and 5,000 Target Leaf values (in one Target Leaf dimension) has a cross product of 25 million. The performance and response time of the Static Table Driver user interface can degrade with extremely large cross products. For this reason, the application applies a limit of 20 million on the size of the cross product. You may modify the default limit by manually updating.

SETUP_PARAMETERS_MASTER.STATIC_TABLEID_TEMP_TABLE_CROSS_JOIN_LIMIT.

When you are working with a Static Table Driver whose cross product exceeds the cross-join limit, the Coefficients tab of the Static Table Driver user interface displays only the "defined" combinations, which are combinations where coefficients are previously established.

Managing Large Cross Product Static Table Drivers

To build a Static Table Driver that will have a very large cross product, follow the normal steps of building out your Key leaf (or node) values and your Target leaf values on the Static Table

Driver Definition tab. If you start with a modest number of defined Key and Target leaves, the Coefficients tab operates normally, and you may save coefficients for any possible combination of Key and Target leaves that you have defined on the Definition tab.

If you navigate to the Definition tab, add more Key leaves and Target leaves, and then return to the Coefficients tab, the Coefficients tab allows you to edit coefficients for any possible combination of your selected Key and Target leaves. This is applicable as long as you have not exceeded the cross-product limit. After you have added enough combinations on the Definition tab for the rule to exceed to cross-product limit, the Coefficients tab no longer shows the unmapped combinations. In this state, you can edit the coefficient values for any previously mapped combination, but you can no longer establish new combinations and coefficient values within the Coefficients tab.

Note

Instead of starting the build process with a modest number of Key leaves and Target leaves, you might also begin by specifying a very large number of Key and Target leaf values. If you specify enough values in the Definition tab to exceed the cross product limit, then when you initially transition to the Coefficients tab it will appear blank.

Regardless of whether your Static Table Driver rule begins as a small rule and evolves into a large cross product rule or your Static Table Driver rule was "large" at the time it was defined, the Coefficients tab only displays the "defined" combinations after you have exceeded the cross-product limit.

Editing Existing Coefficient Values

You can edit the coefficient value for any defined combination within the user interface. Alternatively, you can also export your data and edit coefficient values offline.

Adding New Combinations and Coefficients

To add new combinations and coefficients, perform the following steps:

1. Navigate to the **Definition** tab and add new **Key & Target dimension** values.
2. Navigate to the **Coefficient** tab and export your rule to a spreadsheet.
3. Add your new combinations and their coefficients to the spreadsheet.
4. Save and import the spreadsheet.

Removing Combinations and Coefficients

You can remove coefficients within the Coefficient tab by deleting the coefficient and saving the rule. After you have removed the coefficient for a combination of Key ' Target leaves, that combination is no longer updatable within the Coefficient tab. However, the combination remains defined (that is, you could still add a coefficient to this combination offline).

Navigate to the Definition tab to completely remove defined Key and Target leaf values, and remove the leaves that are no longer required.

1.5 Using Static Table Drivers

Static Table Drivers are declared as drivers in the Driver process tab for allocation rules of the type Static Driver Table.

(For more information, see [Allocation Rules](#).)

Static Drivers Table allocation rules are similar in many ways to Dynamic Driver allocation rules. Both are used to distribute balances, but while Dynamic Driver allocation rules obtain their driver data directly from your business data, Static Driver Table allocation rules obtain their driver data from a Static Table Driver rule.

Static Table Drivers are used in conjunction with Allocation rules for the following purposes:

- To distribute balances at the Management Ledger level.
- To perform a lookup table function against instrument tables.

Distribution with the Management Ledger-level

Static Driver Table Allocation rules that distribute balances at the management ledger-level function similarly to Dynamic Driver allocation rules.

- Key Leaves function similarly to Dynamic Driver allocation rules that utilize < Match Source & Driver >
- Target Leaves function similarly to Dynamic Driver allocation rules that utilize < Match Driver >

Instrument Level Update

Static Driver Table Allocation rules perform a lookup table function against an instrument table to match dimension values for each instrument row against the Key Dimension values you define in your Static Table Driver rule. When you find matching rows, the allocation performs an arithmetic operation combining source balance columns and a coefficient value you specify to update a result column.

Static Table Drivers Use Case

In the following example, your goal is to “product align” your Management Ledger data (your initial General Ledger data is aligned to Organizational Unit and General Ledger Account, but not to Product). You need to write allocation rules that distribute expenses within each cost center to the Product. In this example, you are focusing on expenses incurred in two rollup points within your Organizational Unit hierarchy: Mortgage Origination (a rollup point of multiple regional origination centers) and Statement Processing (a rollup point of multiple statement processing centers).

Your cost studies have told you that 55% of mortgage origination expense is attributable to your 30 Year Fixed Mortgage product, and 45% to your 15 Year Fixed product. At the same time, historical balance reports tell you that 55% of your retail deposits are Savings, and 55% are Time Deposits. On the assumption that balance ratios are a good way to distribute Statement Processing expense, you decide to use a 45-55 split.

To build this allocation, start by constructing a Static Table Driver rule that uses an Organizational Unit Key Leaf and a Product Target Leaf. Select the Mortgage Origination and Statement Processing rollup points from your organizational hierarchy for your Key Leaf values. Select the three mortgage products plus the Checking, Savings, and Time Deposits products as your Target Leaf values. Finally, enable the appropriate combinations of Key Leaf and Target Leaf and enter your coefficient values.

Next, build a new Static Driver Table allocation rule. In the Driver tab, select the Static Table Driver you just built.

In the Source tab, constrain the General Ledger Account dimension with a rollup point whose meaning is Total Non-Interest Expense. Alternatively, you may specify the Financial Element Leaf value 457 – Non-Interest Expense.

Note that you could specify an Organizational Unit constraint in your Source specification narrowing the source data down to just the Mortgage Origination and Statement Processing rollup points. Doing so is not strictly necessary as the allocation rule insists on the matching of Source cost centers, Driver cost centers, and you have already constrained the Driver cost centers in your Static Table Driver rule.

In your allocation Output Debit, specify < Same as Table > for the Organizational Unit dimension and specify < Same as Source > for every other dimension.

Note the similarity between the Static Driver Table allocation rule defined above and a very similar allocation built using dynamic drivers. If the statistics we used in the Static Table Driver were available from an external source that we could load every month to the data model, we could achieve the same results with a Dynamic Driver allocation rule. The Output Debits in the following table show the values you would use for the two rule types.

Note the similarity between the Static Driver Table allocation rule defined above and a very similar allocation built using dynamic drivers. If the statistics we used in the Static Table Driver were available from an external source that we could load every month to the data model, we could achieve the same results with a Dynamic Driver allocation rule. The Output Debits in the following table show the values you would use for the two rule types.

Table 1-1 Static Table Driver - Output Debits

Dimension	Dynamic Driver Allocation Debit Definition	Static Table Driver Leaf Type	Static Driver Table Allocation Debit Definition
Organizational Unit	< Match Source and Driver >	Key Leaf	< Same as Source >
General Ledger Account	< Same as Source >	Not defined	< Same as Source >
Product	< Match Driver >	Target Leaf	< Same as Table >