



PeopleSoft Enterprise Sales Incentive Management 8.9 PeopleBook

December 2004

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About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

You might also want to complete at least one PeopleSoft introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications. For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

As of Date

The last date for which a report or process includes data.

Business Unit

An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description

Enter up to 30 characters of text.

Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and Don't Run	<p>Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	An ID that represents a set of selection criteria for a report or process.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	<p>An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.</p>
Short Description	Enter up to 15 characters of text.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Sales Incentive Management Preface

This preface discusses:

- PeopleSoft Products
- PeopleBook structure.
- Additional resources.
- Deferred processing.
- Common elements in this PeopleBook.

See Also

PeopleSoft Enterprise Sales Incentive Management for High Tech and Industrial 8.9 PeopleBook, “PeopleSoft Enterprise Sales Incentive Management for High-Tech and Industrial Preface”

PeopleSoft Enterprise Sales Incentive Management for Banking and Capital Markets 8.9 PeopleBook, “Sales Incentive Management for Banking and Capital Markets Preface”

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Sales Incentive Management.

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application, or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook:

Chapters	Description
Preface	<p>This is the chapter you're reading now. It explains:</p> <ul style="list-style-type: none"> • How to use this book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With...	<p>This chapter discusses product implementation guidelines. It explains:</p> <ul style="list-style-type: none"> • The business processes that are documented within the book. • Integrations between the product and other products. • A high-level discussion of how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	<p>(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages.</p> <p>Note. Not all applications have delivered custom navigation pages.</p>
Understanding...	<p>(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.</p>
Setup and Implementation	<p>This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if a certain functionality is part of a product, this chapter is devoted to explaining how to set up the functionality, not necessarily how to use it. Use the corresponding business process chapter to learn how to use the functionality.</p> <p>Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.</p>

Chapters	Description
Business Process	<p>This can be one or more chapters. These chapters contain documentation that addresses specific business processes, with each chapter generally devoted to a specific functional area. For example, if a certain functionality is part of a product, this chapter is devoted to explaining how the functionality works, not necessarily how to set it up. Use the corresponding setup and implementation chapter to learn how to set up the functionality.</p> <p>Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.</p>
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information that is considered supplemental to the primary documentation.
Delivered Workflow Appendix	<p>(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application.</p> <p>Note. Not all applications have delivered workflows.</p>
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Patches + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Data models	Support, Documentation, Data Models

Resource	Navigation
Enterprise Integration Point (EIP) catalog Note. Also known as the Interactive Services Repository	Interactive Services Repository on Customer Connection
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Implement, Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes
Table-loading sequences	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Table Loading Sequences
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Implement, Optimize + Upgrade, Upgrade Guide

Deferred Processing

Several pages in PeopleSoft Enterprise Incentive Management applications operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value that you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

Common Elements Used in this PeopleBook

This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook. The following page elements are common to this PeopleBook:

Enterprise Incentive Management or EIM

The term EIM has two meanings in the PeopleSoft system. First, it is a term that encompasses the various PeopleSoft Enterprise Incentive Management products that you use to construct an incentive compensation application: the generic functionality, the industry-specific functionality (Product Category applications), and the industry-specific templates (Market Template applications). Secondly, it refers to the generic functionality that is required by all Incentive Management products to operate.

Note. Many of the Sales Incentive Management PeopleTools records have prefixes of *EI_*.

Participant ID

The Participant ID is an identifying code for an individual participant. *Participant* refers to the person for whom you are calculating incentive compensation pay results. For example, with the Sales Incentive Management product, participants are generally salespeople and sales managers.

Product Category

A product category is a vertical application for a specific market, added on top of the generic functionality of the EIM foundation. When you define a product category value for an object, you limit where that object can be used. Select *Sales Incentive Management*, or *SIM*.

Market Template

EIM market templates include objects, features, and plans that add functionality to a specific product category. When you define a market template value for an object, you limit where that object can be used. Select *High Tech and Industrial*, or *Banking & Capital Markets*.

System Data

The system automatically selects this check box if this data is delivered by PeopleSoft.

CHAPTER 1

Getting Started with Sales Incentive Management

This chapter discusses:

- Sales Incentive Management overview.
- Sales Incentive Management integrations.
- Sales Incentive Management implementation.

Sales Incentive Management Overview

Implementing Sales Incentive Management (SIM) for your organization involves designing the system's structure and putting it in place. Before you can make the most of its flexible design you have to spend some time planning and determine the best way to map the application to your business structures, practices, and procedures. Carefully mapping out your ideas before implementation saves time, effort, and money.

This list describes the process flow for Sales Incentive Management:

- Setting up general application implementation options.
- Configuring specific SIM options for your organization.
- Importing source data.
- Defining plans and plan templates.
- Defining compensation structures.
- Running jobs to process transactions.
- Reviewing, adjusting, and publishing payout information for participants.
- Maintaining the payout results and problem reporting functionality of participant pages.

See Also

[Chapter 2, “Understanding Sales Incentive Management,” page 9](#)

Sales Incentive Management Integrations

Implementing Sales Incentive Management depends on your application environment, whether the source data is derived solely from integrations with PeopleSoft applications or from integrations with other applications.

- An “all PeopleSoft” or homogeneous environment means that you are deriving source data from PeopleSoft Enterprise Human Capital Management, Customer Resource Management, Supply Chain Management, and Financials applications tables.

Sales Incentive Management delivers pre-configured Extract, Transform, and Load (ETL) maps to transfer data from your organization’s source systems into the Sales Incentive Management tables.

- A “mixed application” or heterogeneous environment means that you are deriving source data from other applications.

In this case, you must develop ETL maps to transfer data from your organization’s system into the Sales Incentive Management system.

Prior to installing Sales Incentive Management, you should ensure that these systems are running correctly and producing valid data output. Whether your organization works in a homogeneous or heterogeneous environment, Sales Incentive Management requires that PeopleTools is implemented to function.

See Also

Enterprise PeopleTools PeopleBook documentation

Sales Incentive Management Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Sales Incentive Management also provides component interfaces to help you load data from your existing system into Sales Incentive Management tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

Component	Component Interface	References
EI_BC_BRLICENSE	EI_BC_BRLICENSE_CI	See Chapter 10, “Managing Reference and Participant Objects,” Managing Broker Licenses, page 231 .
EI_BC_WORKHOURS	EI_BC_WORKHOURS_CI	See Chapter 10, “Managing Reference and Participant Objects,” Managing Work Hours, page 230 .
EI_BO_BANKACCTGRP	EI_BO_ACCNTGRP_CI	See Chapter 10, “Managing Reference and Participant Objects,” Managing Account Groups, page 228 .
EI_BO_BANKACCOUNT	EI_BO_BANKACCOUNT_CI	See Chapter 10, “Managing Reference and Participant Objects,” Managing Accounts, page 226 .

Component	Component Interface	References
EI_BO_BANKACTGRP	EI_BO_BANKACTGRP_CI	See Chapter 10, “Managing Reference and Participant Objects,” Managing Account Groups, page 228.
EI_BO_BANKCUSTOMER	EI_BO_BANKCUSTOMER_CI	See Chapter 10, “Managing Reference and Participant Objects,” Managing Customers (Banking), page 219.
EI_BO_BANKPRODUCT	EI_BO_BANKPRODUCT_CI	See Chapter 10, “Managing Reference and Participant Objects,” Managing Products (Banking), page 221.
EI_BO_CHANNEL	EI_BO_CHANNEL_CI	See Chapter 10, “Managing Reference and Participant Objects,” Managing Channels, page 225.
EI_BO_CUSTOMER	EI_BO_CUSTOMER_CI	See Chapter 10, “Managing Reference and Participant Objects,” Managing Customers, page 217.
EI_BO_GEOGRAPHY	EI_BO_GEOGRAPHY_CI	See Chapter 10, “Managing Reference and Participant Objects,” Managing Geographies, page 222.
EI_BO_GRPS	EI_BO_GRPS_CI	See Chapter 10, “Managing Reference and Participant Objects,” Creating Reference Groups, page 235.
EI_BO_INDUSTRY	EI_BO_INDUSTRY_CI	See Chapter 10, “Managing Reference and Participant Objects,” Managing Industries, page 224.
EI_BO_ERRMSG	EI_BO_MSG_CI	See Chapter 9, “Loading Data,” Viewing Error Messages for Stage-to-Production Data Load, page 204.
EI_BO_PACKAGE	EI_BO_PACKAGE_CI	See Chapter 10, “Managing Reference and Participant Objects,” Managing Packages, page 229.
EI_BO_PRODUCT	EI_BO_PRODUCT_CI	See Chapter 10, “Managing Reference and Participant Objects,” Managing Products, page 220.
EI_BOGRP_ERRMSG	EI_BOGRP_ERRMSG_CI	See Chapter 9, “Loading Data,” Viewing Error Messages for Stage-to-Production Data Load, page 204.
EI_BOMEM_ERRMSG	EI_BOMEM_ERRMSG_CI	See Chapter 9, “Loading Data,” Viewing Error Messages for Stage-to-Production Data Load, page 204.

Component	Component Interface	References
EI_CO_BASE_TBL	EI_CI_COMP_STR_SAVE	See Chapter 13, “Working with Compensation Structures,” Associating Reference and Participant Objects with Nodes, page 298.
EI_CSTR_ERRMSG	EI_CSTR_ERRMSG_CI	See Chapter 9, “Loading Data,” Viewing Error Messages for Stage-to-Production Data Load, page 204.
EI_EI_PERF_MEASURE	EI_EI_PERF_MEASURE_CI	See Chapter 3, “Defining Sales Incentive Management General Options,” Defining Performance Measures, page 70.
EI_EI_ROLE_ERRMSG	EI_EI_ROLEMSG_CI	See Chapter 9, “Loading Data,” Viewing Error Messages for Stage-to-Production Data Load, page 204.
EI_MAINT_SOURCE_TX	EI_MAINT_SOURCE_TX	See <i>PeopleSoft Enterprise Sales Incentive Management for High Tech and Industrial 8.9 PeopleBook</i> , “Managing HTI Order Transactions,” Correcting Staged Order Transactions.
EI_MAINT_TRANS	EI_MAINT_TRANS	See <i>PeopleSoft Enterprise Sales Incentive Management for High Tech and Industrial 8.9 PeopleBook</i> , “Managing HTI Order Transactions,” Pages Used to Manage Order Transactions.
EI_PAYMENT_CD	EI_PAYMENT_CD_CI	See Chapter 3, “Defining Sales Incentive Management General Options,” Setting Up Payment Codes, page 67.
EI_PCGRP_ERRMSG	EI_PCGRP_ERRMSG_CI	See Chapter 9, “Loading Data,” Viewing Error Messages for Stage-to-Production Data Load, page 204.
EI_PCMEM_ERRMSG	EI_PCMEM_ERRMSG_CI	See Chapter 9, “Loading Data,” Viewing Error Messages for Stage-to-Production Data Load, page 204.
EI_PCPN_GRP	EI_PCPN_GRP_CI	See Chapter 10, “Managing Reference and Participant Objects,” Creating Participant Groups, page 233.

Component	Component Interface	References
EI_PCPN_ERRMSG	EI_PCPN_MSG_CI	See Chapter 9, “Loading Data,” Viewing Error Messages for Stage-to-Production Data Load, page 204.
EI_EI_ROLE_TBL	EI_ROLE_CI	See Chapter 3, “Defining Sales Incentive Management General Options,” Defining SIM User Roles, page 69.
EI_SI_PARTICIPANTS	EI_SI_PARTICIPANT_CI	See Chapter 10, “Managing Reference and Participant Objects,” Managing Sales Participants, page 214.
EI_VARIABLE_MSG	EI_VARIABLE_ERRMSG_CI	See Chapter 9, “Loading Data,” Viewing Error Messages for Stage-to-Production Data Load, page 204.

Other Sources of Information

Implementing Sales Incentive Management involves coordination between the system administrator and the compensation administrator, or whoever in your organization may be performing these roles. In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface, with information about where to find the most current version of each.

Additional Setup Manager Information

This section provides further instruction beyond what is stored in the Additional Configuration component of Setup Manager.

PeopleSoft Setup Manager allows for the definition of additional configuration steps that need to happen before or after a given component. Sales Incentive Management uses this functionality to note additional steps like running data mover scripts or implementing EIPs for prompt tables. It also uses this functionality to note steps that are related to using the Data Migration tool to move data from the Demo to the SYS database.

The Additional Configuration component of Setup Manager does not allow for detailed instructions. Therefore, the following tables provide the detailed instructions to supplement what is in Setup Manager. The table shows components with additional configuration at the publication time for this PeopleBook. For the most up-to-date list, query PS_EOLT_ADDNL_CFG for the list of components.

Setup Component	Pre or Post	Feature Specific	Type	Name	Description	Instructions
EI_ODS_TO_EIM	Pre	Yes- IMSIM1010, Compensation Structures	Other	TREE LOAD	Load source tree	Load tree manager data from source to Sales Incentive Management.
EI_PYCD_MAP	Pre	Yes- IMSIM2000, Interface to North American Payroll	Other	EARNINGS_TBL EIP	Populate EARNINGS_TBL	Subscribe to the EARNINGS_TBL integration in order to synchronize PeopleSoft payroll for North America earnings codes to the Sales Incentive Management mapping table.
EI_SEQUENCE	Pre	No	Other	SCRIPT	Run script to update sequence numbers.	<i>New Installations Only:</i> Run Data Mover script IMSEQSYS.DMS in order to update the sequence values. This is listed as “Pre” but there is no other action to take after running this script.
EI_SI_PARTICIPANTS	Pre	No	Other	FREQUENCY_TBL EIP	Load Comp Frequencies if Needed for Rules	Compensation Frequency is an attribute of the participant, but not a required field. First, determine if your implementation requires this field to be populated. Are you using Compensation Frequency within your plan rules, for instance? If you need this attribute, you should subscribe to the FREQUENCY_TBL EIP to synchronize these values from PeopleSoft Enterprise Human Resources.

See Also

“PeopleSoft Enterprise Sales Incentive Management Preface,” page xxix

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

CHAPTER 2

Understanding Sales Incentive Management

This chapter discusses:

- Incentive Management.
- Sales Incentive Management.
- Incentive compensation definitions.
- Incentive compensation processing.
- Incentive compensation reporting.

Incentive Management

The Incentive Management solution addresses the definitive goals of mature incentive management software, which are to capture and calculate incentive pay data, to administer compensation information that can be communicated to incentive plan participants in a timely and accurate manner, and to adjust compensation information as needed before final payout. This solution supports global incentive management needs regardless of your organization's size.

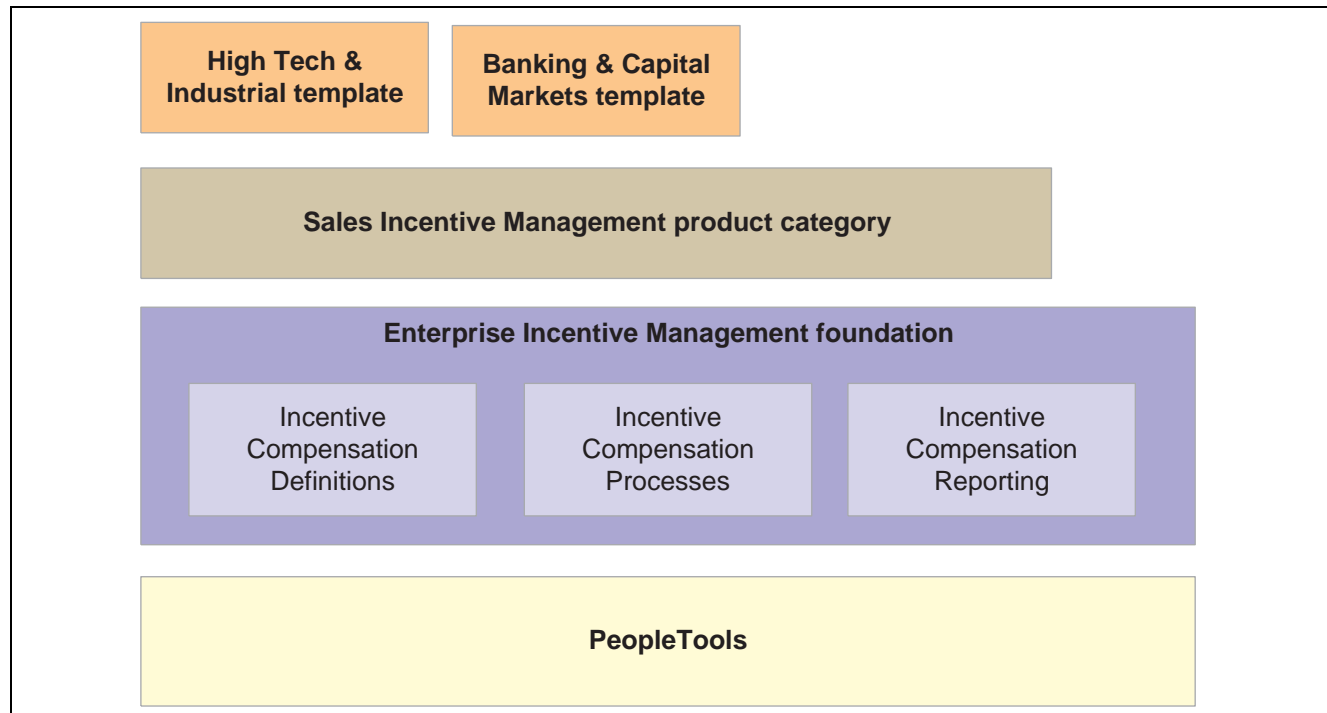
Incentive Management enables you to develop compensation processes that map to your organization's unique business processes and practices. You create flexible rules-based compensation structures and plans, then import reference and transaction data seamlessly into Incentive Management. Apply these compensation structures and plans to the reference and transaction data and process incentives to create payments to award to your incentive management participants. After you process incentives, participants can use the intuitive user interface to review their incentive compensation. Employees have access to extensive compensation-related and web-enabled reporting features, yet your organization has the ability to protect its incentive pay data by determining who can view what data through standard PeopleSoft security and control functionality.

To support different products, the Incentive Management solution comprises these architectural layers:

Enterprise Incentive Management (EIM) Foundation	Generic features and functionality (metadata objects, engines, and processes) that support industry-specific add-on functionality in the form of product categories and their associated market templates. All Incentive Management product categories and their corresponding market templates are built upon the EIM foundation.
Product Category	A vertical application designed to address a specific incentive management need (sales, MBO based, partners, royalties), added on top of the generic functionality of the EIM foundation.
Market Template	A packaged library of objects, common rules, functions, services, and tools that map to compensation business processes, sales models, and incentive approaches found within a specific industry or market.

Both product categories and market templates deliver components that address the unique needs of each industry to maintain compensation plans.

This diagram shows how the Sales Incentive Management product category and its market templates are layered upon the EIM foundation, which is fully integrated with PeopleTools:



Understanding Incentive Management architecture

The EIM foundation is built upon PeopleTools, and leverages dynamic Tree Manager, general security, business components, application classes, and portal navigation.

Within the EIM foundation, there are three generic areas of incentive compensation functionality: definitions, processes, and reporting. The foundation as a whole provides the architecture necessary to support various product categories.

Note. The three generic areas are abstract representations to help you conceptualize the EIM foundation. They are discussed in detail in later sections of this chapter.

Built upon the EIM foundation are the product categories. Currently, PeopleSoft delivers the Sales Incentive Management product category.

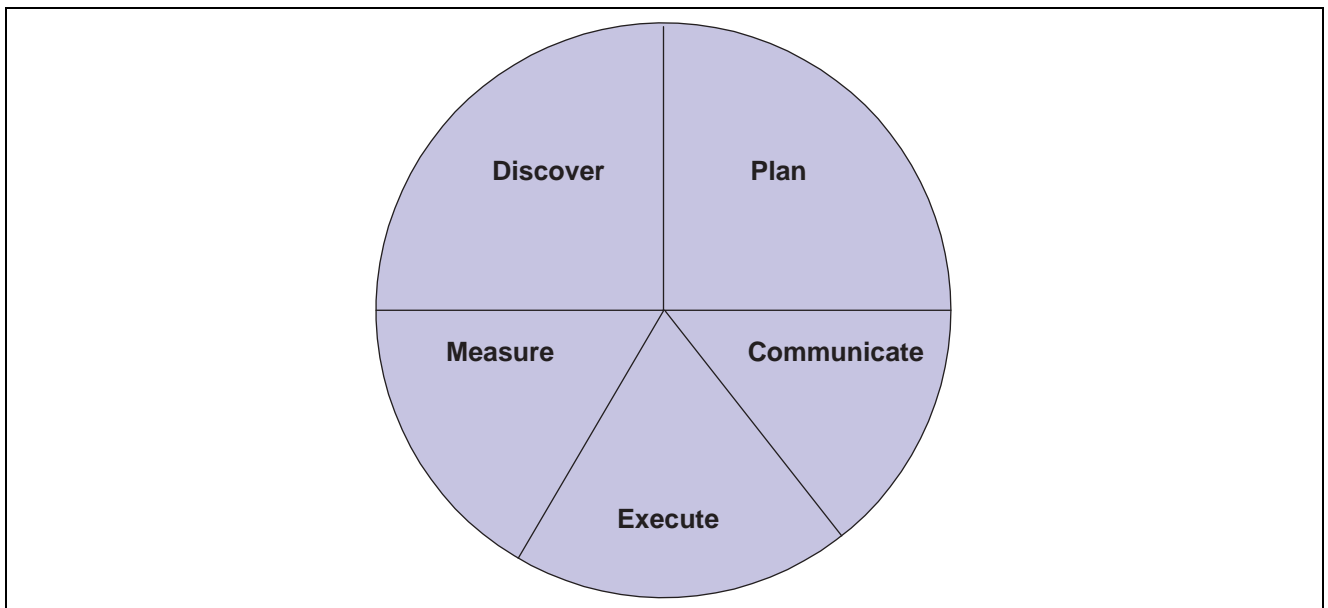
Market templates, such as the High-Tech and Industrial template and the Banking and Capital Markets template, are built upon the product categories.

The Incentive Management solution further extends market template capabilities through its Vertical Development Kit (VDK). The VDK enables you to easily tailor the market templates to your own business needs. It consists of documentation, design components, and utilities for the building, customizing, and configuring of the market templates.

Sales Incentive Management

Sales Incentive Management is the first product category offering within the Incentive Management solution and is designed to meet the needs of incentive management for sales organizations. This product category is built upon the EIM foundation and consists of the High Tech and Industrial market template and the Banking and Capital Markets market template. The High Tech and Industrial (HTI) market template offers items and functionality that support the direct sales models typically found within technology-related or industrial enterprises, business-to-business distribution, and high-tech hardware and software companies. The Banking and Capital Markets (BCM) market template offers items and functionality that address the management of sales incentive compensation in the banking industries.

Sales Incentive Management is a true end-to-end solution. This diagram shows the incentive management business process that Sales Incentive Management supports:



Supporting the incentive management business process

Plan: The cycle begins with plan design and modeling. Your compensation analyst can define complex plans and validate them against past, current, and forecast datasets.

Communicate: Next move on to communication and workflow. Your compensation administrator can deliver near real-time performance feedback to rewarded employees and managers. Sales Incentive Management provides the flexibility to implement and modify any plan without writing custom code as well as flexibility in how data is organized, integrated, and validated (define territories and quotas, collect data inputs, process adjustments, validate and audit, calculate payments).

Execute: Manage and control routine data collection and processing, with minimal IT involvement. Most processing can be handled by your compensation administrator, with little intervention by IT. Sales Incentive Management does provide tools for IT to add additional formulas to support unique rules.

Measure: Results of the incentive calculation are put in the hands of management with personalized, interactive reports, enabling management to reinforce desired behaviors and look for opportunities to improve. Results of the calculation are also available through self-service to the sales force. Sales Incentive Management enables you to communicate to all stakeholders with personalized interactive documents, their quotas or commission rates, and their plan rules. And the incentive cycle continues when the compensation analyst reviews the results of the process. Using the reporting tools, you can inform compensation professionals and management of both individual performances and the effectiveness of incentive plans.

Discover: Finally, you can discover opportunities to improve plans and adapt and make changes to plan designs and performance objectives.

Incentive Compensation Definitions

This section discusses:

- SIM metadata and objects.
- Compensation structures.
- Plans and plan templates.

SIM Metadata and Objects

Metadata, which is data about data, is the primary building block for Sales Incentive Management, providing a defining layer that enables:

- Technical users to establish dynamic relationships between tables.
- Business users to easily identify the data that interests them without having to know the database structure.

Within Sales Incentive Management, all Sales Incentive Management (SIM) objects are defined using SIM metadata, and all SIM components, engines, rules, queries, and classes are fully metadata aware. There are three types of SIM objects: reference objects, participant objects, and user interaction objects (UIOs). These object types are discussed in detail where appropriate in this PeopleBook.

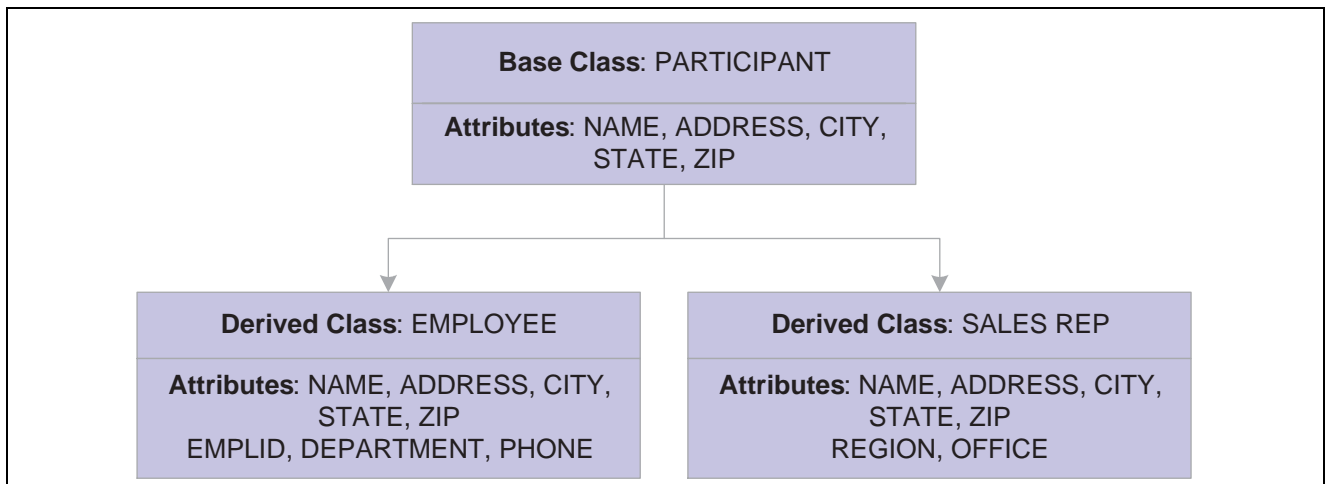
While PeopleTools already uses metadata to define objects and records, Sales Incentive Management extends this capability. For example, in PeopleTools Application Designer you can define whether a field is numeric or character, how long the field is, and so on. SIM metadata allows further definition, such as changing the name of a field throughout the application by means of metadata. This enables you to label the same field, Participant, as Sales Representative throughout the High Tech and Industrial Market template and perhaps Agent throughout a Banking and Capital Markets market template.

Using metadata makes for a product easily configurable to your organization's needs, as any newly created objects inter-operate with the system as integral built-in objects. New objects are registered to the SIM system by using the metadata with the proper product category (and market template, if applicable).

Sales Incentive Management delivers a Metadata Objects Catalog, which contains a comprehensive set of predefined objects that are categorized into either base or derived object classes. This table describes the metadata object classes:

Metadata Object Class	Description
Base class objects	Include all of the attributes common or necessary to a class.
Derived class objects	Include all of the common attributes of their parent base class, and whatever unique attributes are required by the specific derived object.

This diagram illustrates the relationship between a base class object and derived class objects:



Understanding base and derived classes

Sales Incentive Management uses the delivered Participant base class object to define any individual who receives incentive payments. All attributes common to all participants are stored here. As illustrated in the diagram, you can use SIM metadata functionality to easily create additional derived class objects Employee and Sales Rep to further refine the Participant base class object and better represent your organization's business structure. The derived class objects are child objects and include all attributes of their parent base class object (Participant), plus those specific attributes required by an employee or sales representative.

See Also

[Chapter 4, "Registering Base and Derived Classes," page 77](#)

[Chapter 5, "Managing User Interaction Objects," page 91](#)

[Chapter 10, "Managing Reference and Participant Objects," page 211](#)

Compensation Structures

A compensation structure is a hierarchical relationship of compensation objects representing the compensation-related relationships among them. To define a compensation structure, you need to build the structure with participant and reference objects, which are defined in SIM metadata, and associate the structure with an incentive plan that contains programmatic logic for processing incentive transactions.

A compensation object is a node within the compensation structure, and it is the building block that makes up the compensation structure's hierarchical representation. Compensation objects can be the parent or child of other compensation objects to create the hierarchical compensation structure. There is a one-to-many relationship between parent and child compensation objects to build the hierarchical structure.

A compensation structure is built of compensation objects linked to participant and reference objects using one of these relationships:

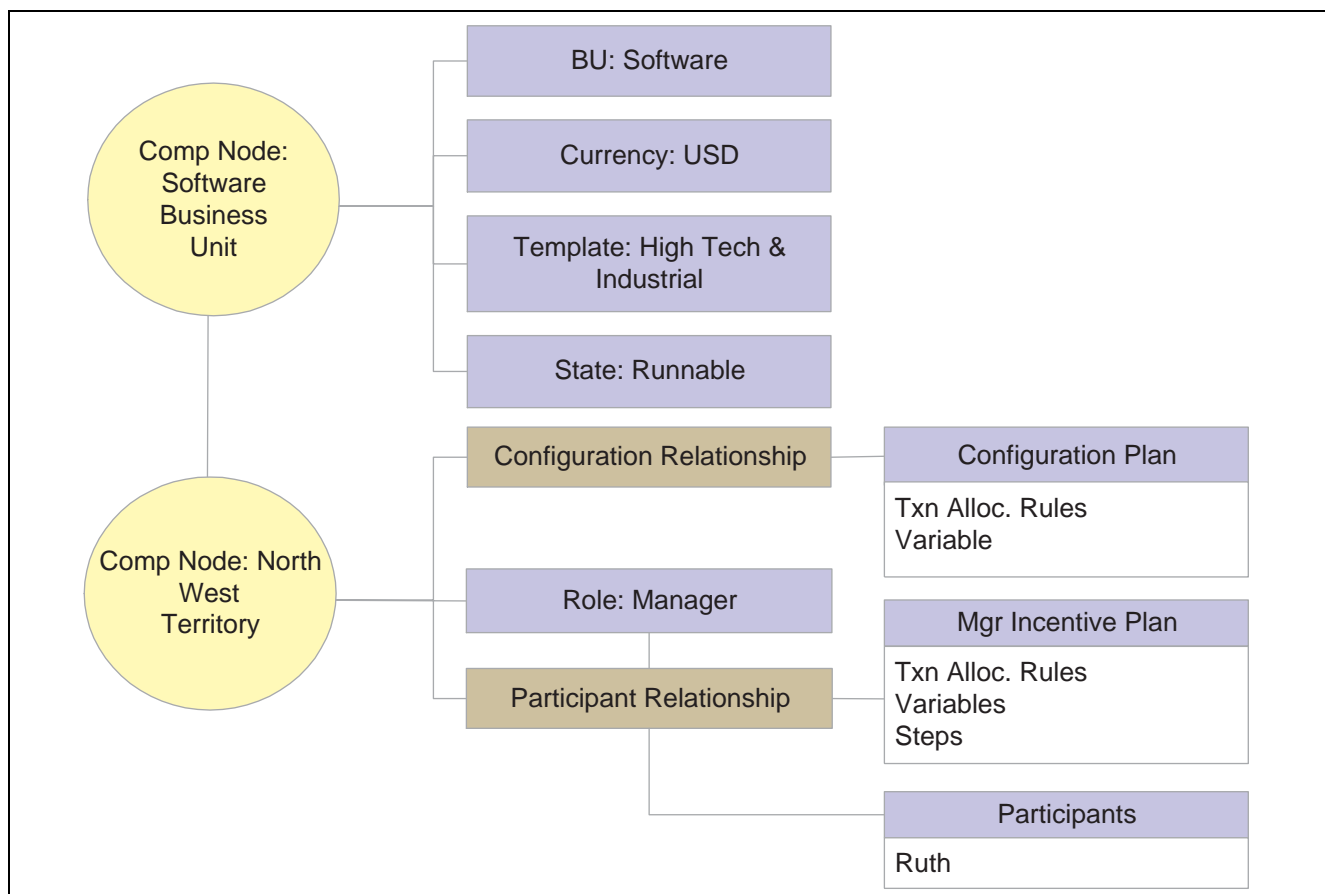
- *Access*: Defines security access for participants who are not associated with an incentive plan.
- *Configuration*: Defines common rules and variables used for processing incentives.
- *Connection*: Defines the connection between two compensation structures.
- *Participant*: Defines the participants who are receiving the results of the incentive calculation and defines security access.
- *Reference*: Defines the type of relationship between the objects by pointing to reference objects to define the territory.

Relationships allow the compensation structure nodes to be fully defined to enable correct transaction processing. For example, reference relationships can define the products belonging to a particular territory by pointing to a list of products defined elsewhere in the database.

All compensation objects contain common information in the compensation object base class. Any compensation object will be a derivative of this base class with mandatory data about that compensation object such as an unique identifier, an effective date, and a compensation object type.

Derived classes, or subclasses, of compensation objects include attributes additional information associated with a specific compensation object type. This can be any information necessary to resolve the incentive compensation and is helpful for the compensation calculation and logic. For example, compensation objects of the compensation object type *Business Unit* define the currency to be inherited by all the derived (or “child”) compensation objects. This defined currency is used for calculations and business unit reporting.

This diagram shows how a compensation structure is a hierarchical representation of your sales organization based on a territory hierarchy, and how multiple relationship objects further define the structure’s territories:



Viewing a compensation structure

Compensation structures consist of objects arranged as nodes on a territory tree. The root node of a compensation structure must always be a business unit. A business unit can have multiple compensation structures, and structures from one business unit can be linked to a structure from another business unit to allow data from one business unit to roll into another business unit.

The configuration relationship in the diagram links the configuration plan to the Northwest territory. The Participant relationship links the role of Manager, the Mgr. Incentive Plan, and the Participant rule together.

Sales Incentive Management leverages existing PeopleSoft Tree Manager functionality to define compensation structures.

See Also

Chapter 13, “Working with Compensation Structures,” page 289

Plans and Plan Templates

Plans are the programmatic representation of an organization’s incentive calculation process. Sales Incentive Management uses two types of plans: configuration plans and incentive plans.

- Configuration plans — store common transaction allocation rules and variables needed by other plans so that you do not have to redefine them for every plan. These plans are attached to a node on a compensation structure as part of a configuration relationship. Configuration plans are optional. They are intended to make it easier to define common variables and allocations.
- Incentive plans — direct the SIM Engine on how to calculate sales incentives or perform other tasks. These plans are assigned through the participant relationship to a node on a compensation structure. During incentive calculation processing, the SIM Engine uses the information in both the incentive plan and its corresponding compensation structure to process transactions and calculate incentive payout results.

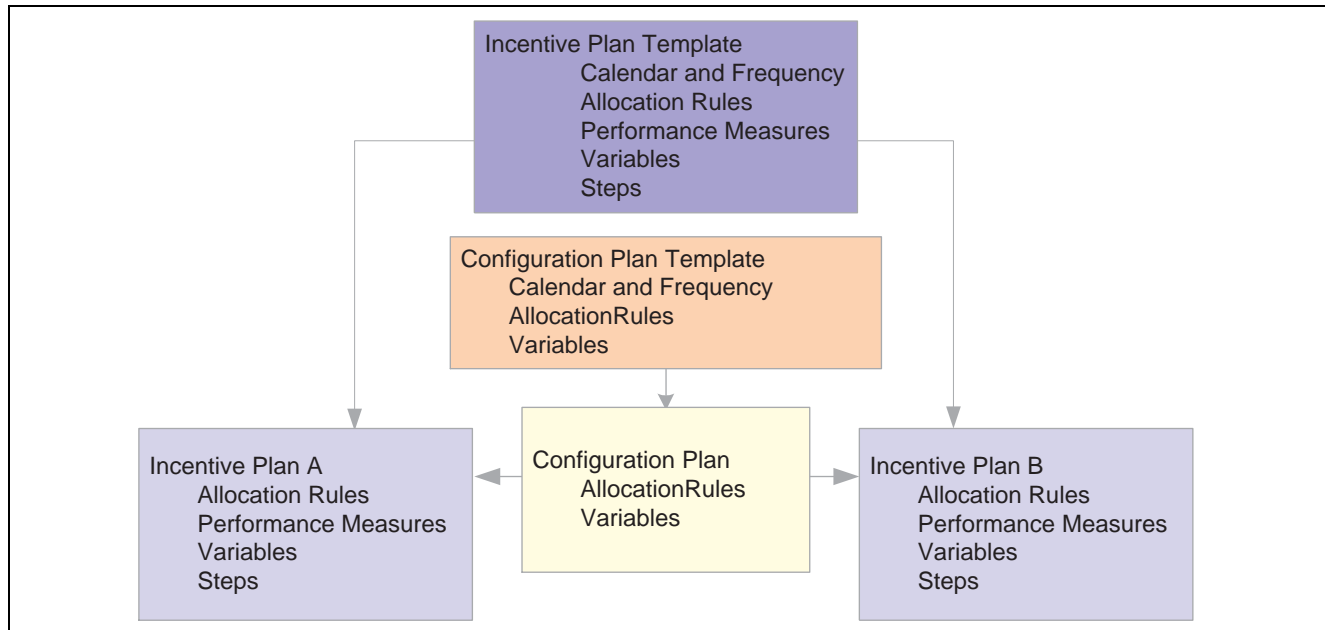
In addition to other information necessary for system processing, plans contain:

- Calendars and calendar frequencies, which establish the period over which the plan executes and control the lifetime of the variables that you use in a plan.
- Sections, which are a collection of rules responsible for a subset of the plan.
Sections are associated with a single, specific type of SIM transaction, such as orders or shipments.
- Steps, which define payout calculation and processing.
- Allocation rules, which define the incentive payout calculation process and may perform various functions such as calculating compensation, updating information, and managing transactions on the SIM Payout table.
- Variables, which are measurements used by the transaction allocation rules for compensation calculation.

Variables can be simple numbers and constants or more complex structures such as aggregators and quotas. Plan variables persist from run to run, while *local* variables exist just for the life of the section.

Incentive plans and configuration plans must be created from plan templates. Plan templates map the steps in your business process. Configuration plans are created from configuration plan templates and incentive plans are created from incentive plan templates. Inheritance allows plans to take on the attributes of the template: calendar and frequency, transaction allocation rules, variables, and steps.

This diagram shows that configuration and incentive plans are derived from plan templates and control how Sales Incentive Management calculates sales incentives for plan participants:



Templates and plans

You create calendars, calendar frequencies, transaction allocation rules, performance measure variable groupings, variables, and steps in the plan template. You create transaction allocation rules and variables in either a configuration plan or an incentive plan. If you create transaction allocation rules and variables in the configuration plan, incentive plans use the transaction allocation rules and variables either on the same level or lower down on the compensation structure. This enables you to define common transaction allocation rules and variables once so that you can use them in all incentive plans in a structure. Within limits that may be imposed by the plan template, you can define incentive plans with transaction allocation rules, variables (measurements used by the rules for compensation calculation), performance measure variable groupings, calculation processing steps, and incentive plan rules.

In addition, Sales Incentive Management includes pre-configured formulas that assist you in writing computation rules for your organization's incentive plans. These delivered formulas should cover most of your organization's business needs. They are stored in the Formula Catalog. You can create new formulas as necessary.

Sales Incentive Management delivers sample plans and plan templates.

Incentive Compensation Processing

This section discusses:

- Data acquisition and integration.
- Sales Incentive Management process model.
- Engine architecture.

Data Acquisition and Integration

A major feature of Sales Incentive Management is the ability to import business definition and source data from PeopleSoft solutions and third-party enterprise applications, such as order entry systems, shipping systems, HR systems, and CRM systems. The data from these sources provide Sales Incentive Management with reference data, such as employee and customer names, and transaction data, such as order and return information. You can use the data from these sources to define compensation structures and prepare for incentive calculation processing.

Data transference occurs in two steps:

1. Import data from source system to the SIM staging tables.
2. Load data from SIM staging tables to SIM production tables.

At each step, data is transformed in preparation for incentive calculation processing.

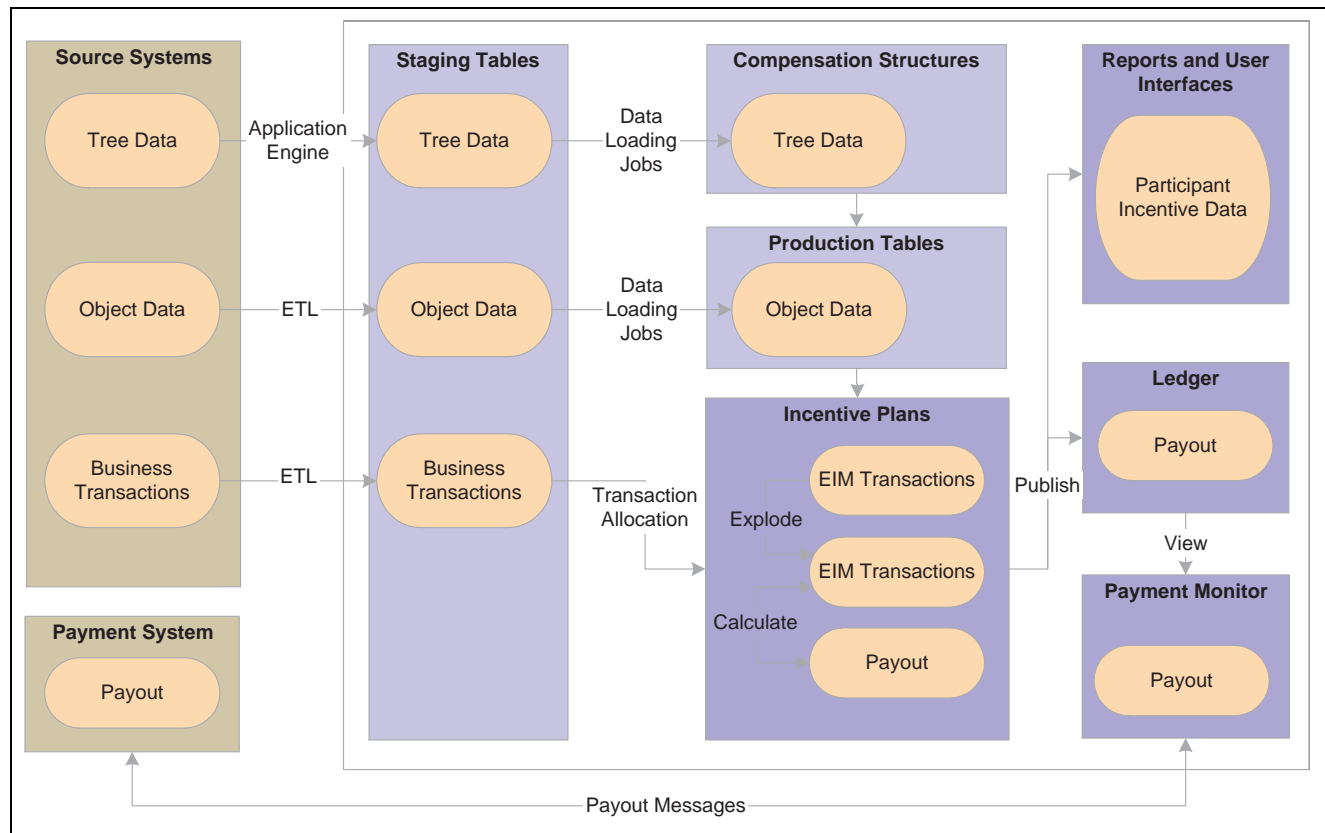
You can import source data into Sales Incentive Management from PeopleSoft solutions and non-PeopleSoft applications:

Sales Incentive Management uses:

- Customer Relationship Management (CRM) quotas and territories to define incentive plan hierarchies and rollups.
- Human Resources Management Services (HRMS) organizational data related to employees and reporting hierarchies.
- Supply Chain Management (SCM) orders and shipments as input for sales credit.
- Financial Management (FIN) invoices and other transactions for use in assigning sales credit.
- Payroll for North America for the bidirectional exchange of payout messages.

Sales Incentive Management Process Model

Sales Incentive Management accepts data from external sources for incentive calculations and then publishes payment data to payroll and financial systems. This diagram presents a simplified overview of the incentive pay process from data acquisition to final payout:



Understanding the Sales Incentive Management process model

The Sales Incentive Management process model is:

1. **Source Systems:** Sales Incentive Management leverages an Extract, Transform, and Load (ETL) data acquisition tool to transfer business transaction data, reference object data, and participant object data from source systems to the SIM staging tables, and provides an ETL Application Engine process to accomplish loading compensation structure data from PeopleTools tree tables into SIM staging tables.

Source systems include PeopleSoft applications, legacy systems, flat files, existing data warehouse external data, and PeopleTools tree tables. Sales Incentive Management delivers ETL maps for PeopleSoft sources. You must build your own maps for other sources. The system loads source data into the appropriate SIM staging tables that correspond with the objects in the metadata Object Catalog.

2. **Staging Tables:** At this stage you can review and correct data errors in the SIM staging tables.

You can then use the delivered data loading SIM Engine jobs to load reference and participant data from the to the SIM production tables and tree data into compensation structures. For transactions, you must include an allocate step in the incentive calculation process to move data from the staging tables to the production tables. After you load reference and participant data into the SIM production tables and tree data into compensation structures, you can use the data during the incentive calculation process.

3. **Incentive Plans:** The system performs most of the incentive calculation work—credit allocation and incentive calculation—in the incentive plans.

Here the system processes SIM transactions according to the incentive plans of the participants who claim the transaction. The system explodes data, meaning the data is enhanced based upon business rules within the incentive plan to assign credits to participants. Examples are rollups or splits. After data is exploded, the system calculates compensation based upon rules in the incentive plan.

During processing in the SIM engines, the system processes transactions in steps that correspond with your business process. Within the steps, the system processes transactions by section. Plan sections contain the rules that are used to calculate incentive compensation values, modify variables, and implement the plan logic. Within plan rules, the system promotes transactions to an incremental series of transaction states that route transactions through your business process.

4. *Reports & User Interfaces*: The system publishes report-worthy data from the incentive calculation results to reporting objects, which provide results data for compensation administrators' and participants' user interfaces and reports.
5. *Ledger*: The system publishes payout data from the incentive calculation results to the ledger (EI_LEDGER).

From the ledger the system sends payout messages to the payment systems and reverses the ledger line items. The payout messages are viewable through the payment messages monitor.

6. *Payment Monitor*: The system delivers finalized data to either internal PeopleSoft or external third-party payroll and financial systems.

The system uses a Sales Incentive Management engine in conjunction with a PeopleTools Integration Broker Enterprise Integration Point (EIP) to publish a message to PeopleSoft Payroll for North America. The message contains the amount to be paid to or adjusted for each participant, all of the data elements that each payroll system needs to identify the sales period to which the payment applies, and the desired payment date. You can also use PeopleTools Integration Broker and predefined codesets to transform the data for delivery to external third-party payroll and financials systems.

In addition to sending payout messages, Sales Incentive Management receives incoming messages from the payment system. Payment information and status are viewable to participants through the participant user interfaces and reports.

SIM Engine Architecture

Sales Incentive Management engine architecture has three distinct functions:

- SIM process controller.
- SIM processing contexts.
- SIM engines.

SIM Process Controller

The Sales Incentive Management process control monitor interface supports definable business processes and the use of engine metadata to register and invoke various engines in the execution of the business process.

Sales Incentive Management executes its processes (for example, transaction processing, incentive calculating, and data loading) through a collection of processing steps that constitute an SIM job. A job defines the processing scope, period, run-as date, batching query and business process, or *steps*. Processing steps are defined to match your business process, and associated with the particular engine that is responsible for executing the step. The process controller then orchestrates the execution of steps by invoking the appropriate engines in order during the *run* of a job. A run represents a specific execution instance of a job, and runs are executed by the PeopleTools Process Scheduler on either an ad hoc or scheduled basis.

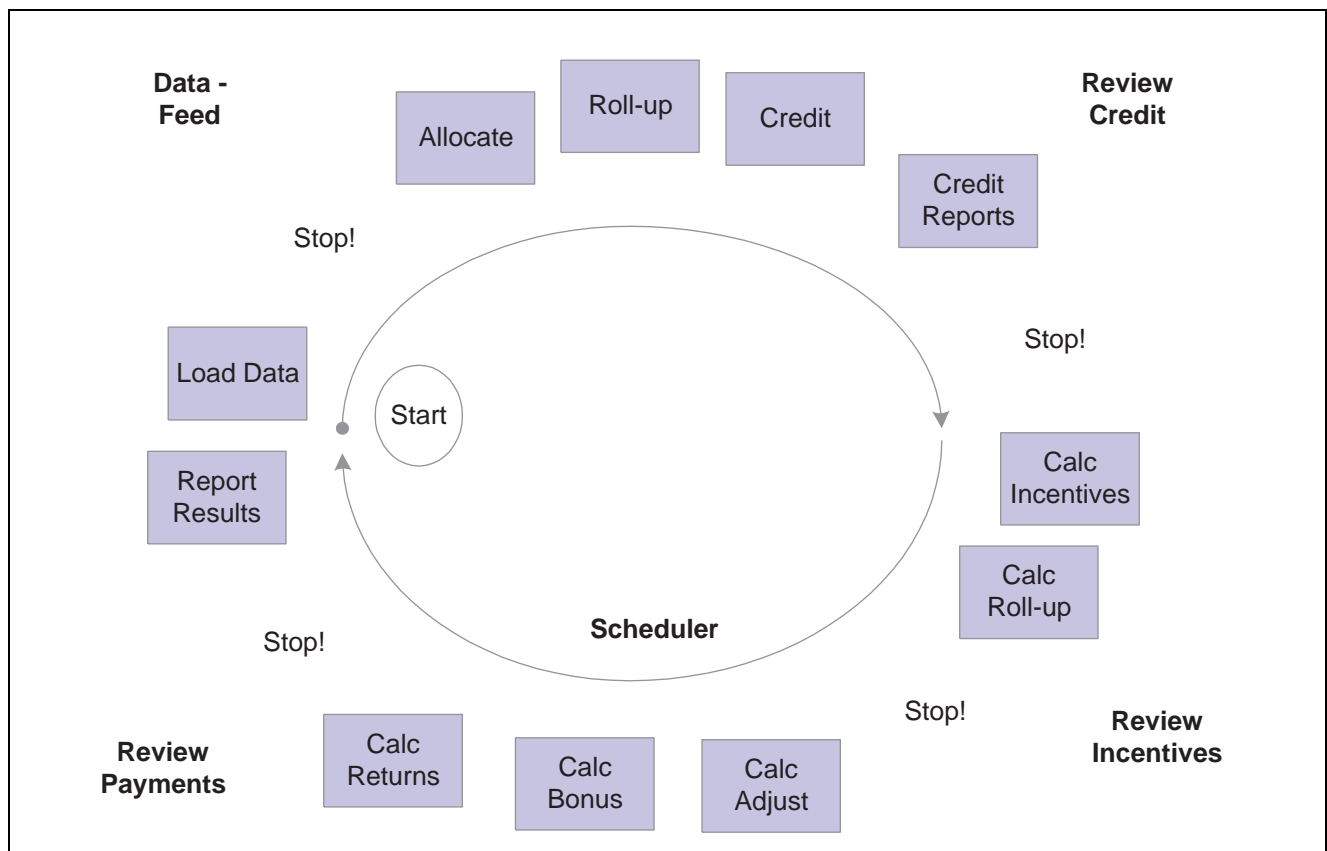
When a job is defined, it is associated with a particular compensation structure and one or more incentive plans. You can narrow the job scope to a portion of the compensation structure, down to an individual participant on that structure.

For incentive calculation, the steps are defined within your plan templates and plans. You set up an SIM job definition to perform these steps, and use the Process Control Monitor interface to define, schedule, and monitor processing. Job steps may perform any task that is relevant to your business processing and which can be tied to the main SIM engine (EI_MASTER).

SIM Engine job definitions have certain logical restrictions. For example, when defining a job for a specific compensation structure, any incentive plans that are selected for processing must all be based on the same plan template, and all of the plans executed in a job must be on the same calendar. The system enforces these restrictions to ensure correct transactional processing.

You initiate plan processing using the SIM Process Control Monitor interfaces. These interfaces enable you to define jobs, schedule and execute runs based on these jobs, and monitor the progress and status of executing or previous runs.

SIM jobs are slightly different than jobs from some traditional job-scheduling systems. An SIM job can be stopped for workflow approval or to enter manual changes or corrections to be applied between steps. After a stop or workflow step, you can continue a run, picking up the engine processing where it left off and continuing with the next step. You can also restart a run, which begins processing over again from the first step. When you restart a run, the system generally includes any new transactions and processes them incrementally.

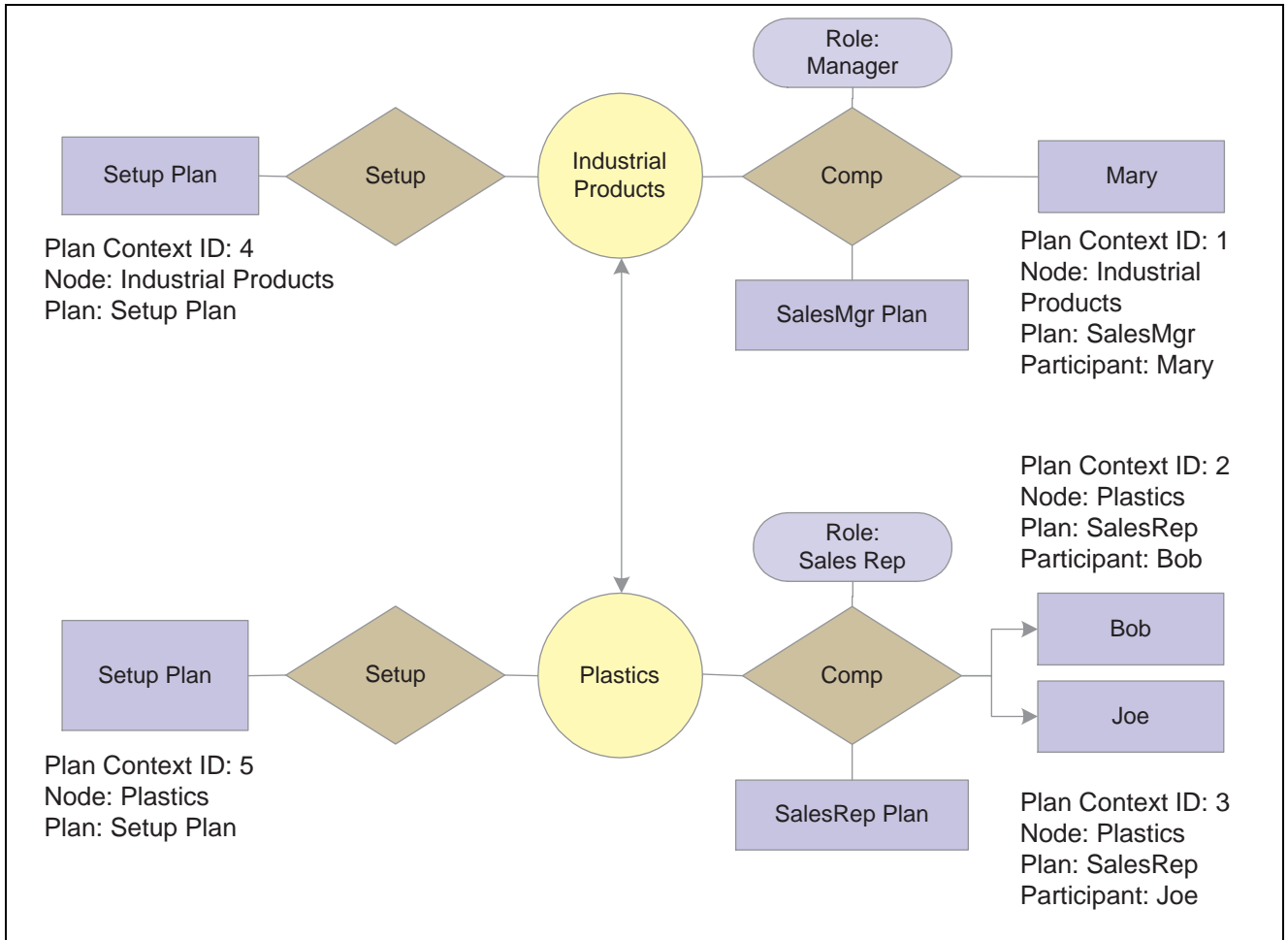


Viewing the SIM business process flow

SIM Processing Contexts

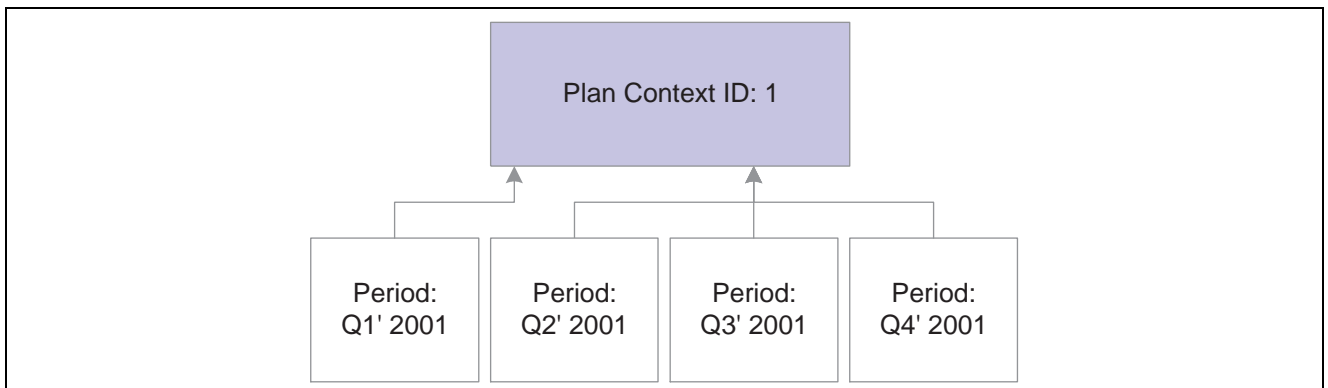
When a job is run, the engine needs to determine what to execute in the scope of the run. The SIM processing context defines a set of objects that relates transactions and processing results to the context under which they were generated. This context enables the results to be easily tracked to the specific participant, incentive plan, compensation structure node, and period from which the context was generated. To facilitate this, there are three types of contexts: plan contexts, period contexts, and run-level contexts.

Plan Context: As illustrated in the diagram, a plan context correlates every participant with the incentive plan and node to which they are assigned. From this context it is possible to find anything associated with the node that is necessary during compensation processing.



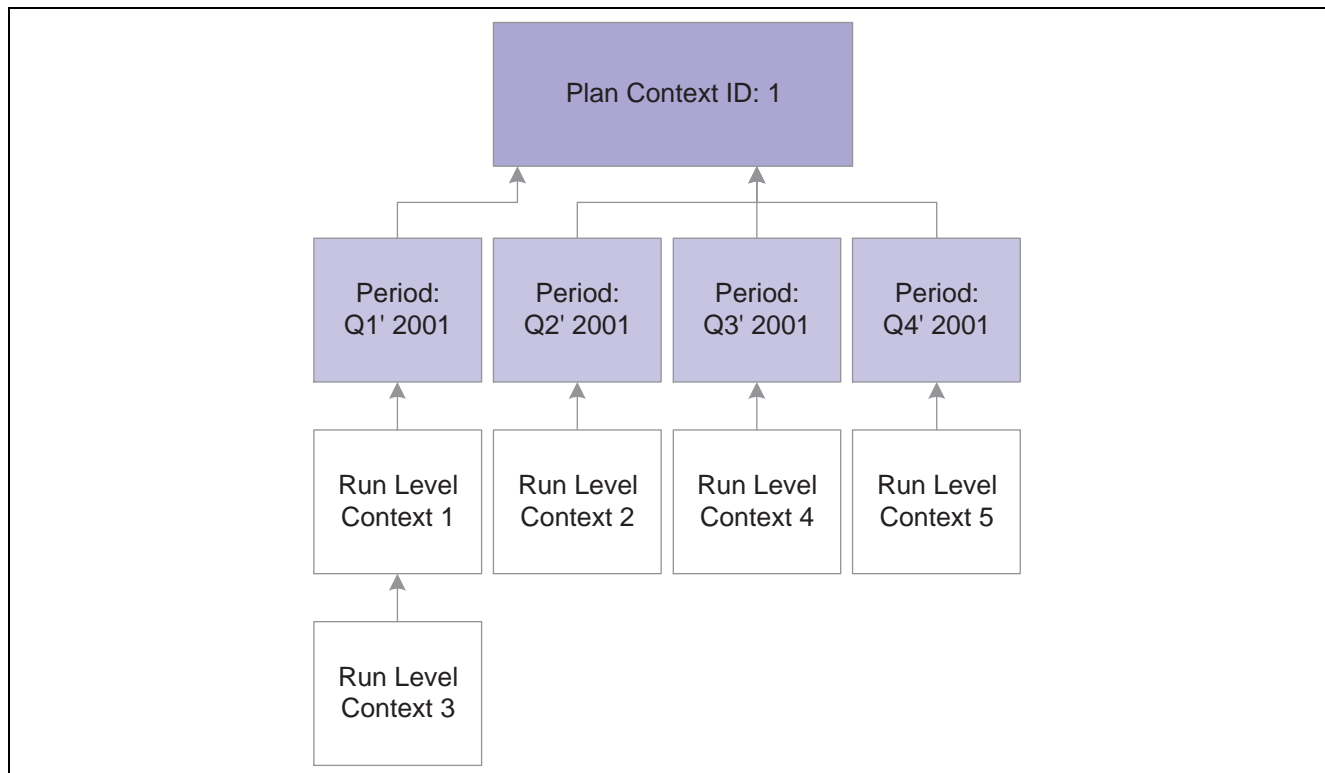
Viewing plan context

Period Context: Associates a plan context with a specific calendar period and fiscal year, as illustrated in the graphic. The period context has a reference to the associated plan context, forming a chain. Each plan context has a corresponding set of period contexts.



Viewing period context

Run-Level Context: As shown in the diagram, a run-level context associates a particular run (and BatchID number) with a period context and plan context. There is a separate run-level context for every plan context that participates in a run. As a run cannot span periods, there is never more than one run-level context associated with a plan context.



Viewing run-level context

SIM Engines

Just as you define and build the compensation structure, you define and build the incentive calculation process for the Sales Incentive Management engines. The main SIM engine (EI_MASTER) is the primary transaction-processing component of Sales Incentive Management and thus the main engine responsible for executing the rules contained in incentive plans against the input stream of transactions. It processes incentive-related transactions in order to calculate incentive compensation. It can process transactions with complex interactions between variables and reference objects in both real-time and batch modes. This engine combines the set-based processing capabilities of PeopleSoft's Application Engine functionality with a procedural formula evaluation processor for calculating values based on transactional input and updating plan variables during processing. The SIM Engine process is different than most engine processes, as you can review and manually change transactions through the processing stages, prior to publishing compensation results data to the participants. The process control monitor and processing contexts are at the center of the SIM Engine process. The SIM Engine is built to run in tandem with the PeopleTools Process Scheduler functionality.

The main SIM Engine invokes smaller SIM engines to perform specific job steps, and these smaller engines invoke specific processes in tandem with PeopleTools Process Scheduler to complete the calculation process. Each engine is autonomous from the processing point of view, interacting with the data and component within its context, and also having access to global data. The SIM engine processing concept is for the engines to accept and handle transactions, and then push these transactions from one processing stage to the next until run completion.

In addition, by using the context processing formulas, transactions are fully traceable throughout the entire system, with rollback functionality to remove specific transactions from the system and restart processing with a clean database.

See Also

Chapter 2, “Understanding Sales Incentive Management,” Incentive Compensation Processing, page 16

Incentive Compensation Reporting

One of the goals of incentive management software is to effectively manage communication about compensation pay results between you and your participants. SIM reporting functionality enables you to define and control the incentive calculation reporting process.

This section discusses:

- User interaction objects (UIOs).
- Participant user interfaces.
- Reporting infrastructure components.
- Report Manager.
- Query Builder.

UIOs

A UIO is a metadata object that describes a particular reporting object, such as a page or report. By attaching a UIO to a participant on a compensation structure using a relationship, you define the reporting object that a participant can access in his or her context. UIOs drive the web pages and reports that are available to participants. The system uses these UIO definitions, along with security settings, to dynamically generate a main compensation page for the participant (or multiple main pages, if the participant is attached to multiple compensation structures) of reporting information for a specific participant, enabling access to that person's compensation information.

There are four types of UIOs:

- *Configurable UIO*: Contains all the incentive information that participants see when they access the participant user interface (UI) pages that are based on UIOs that you configure through PeopleSoft Pure Internet Architecture setup pages.
- *UIO Page*: Contains information to display a SIM page, such as the Compensation Snapshot or Project Compensation pages.
- *UIO Report*: Contains information to display a SIM report, either an SQR or Crystal report.
- *UIO Groups*: Contains information to display one or more reporting objects, such as a group of SIM pages or SIM reports. Using this feature enables you to assign multiple reporting objects to a participant. When dynamically generating the participant's main compensation page, the system uses UIO Group information to create the page display.

Like all other SIM metadata objects, you can create and register unique UIOs to accommodate your organization's reporting requirements.

See Also

Chapter 2, “Understanding Sales Incentive Management,” Incentive Compensation Processing, page 16

Participant Reporting User Interfaces

The term *report* in SIM encompasses more than the standard PeopleSoft Crystal or SQR report. In SIM, a reporting object means any user interface populated with compensation results data. Sales Incentive Management delivers dynamically generated participant pages that access inquiry pages, and predefined Crystal reports.

The participant UI provides the interface for all participants to interact with the system and view calculated incentive compensation. A participant’s main compensation page is dynamically constructed based on his or her assigned role and UIOs. Participants with a *Manager* role are provided with additional functionality—they can view and access their subordinates’ information. For any participant attached to multiple compensation structures, a display page enables them to select a specific structure (in SIM, a territory) to view.

The participant UI also includes problem reporting functionality. Participants can send an email to report issues or discrepancies with their incentive compensation information. The system automatically addresses the email to the compensation administrator managing that particular compensation structure.

Though Sales Incentive Management does not deliver predefined SQR reports, you can define a UIO with your SQR report parameters and attach this customized UIO to a participant.

See Also

Chapter 20, “Managing the Participant Reporting Interfaces,” page 439

Reporting Infrastructure Components

Reporting is an integral part of Sales Incentive Management. Unlike traditional reporting paradigms where reporting information is typically populated at the end of the business process as a batch, SIM reporting is an integral part of the process.

Sales Incentive Management reporting infrastructure consists of the following architectural components:

- Reporting data model
- Various reporting engines
- UIOs

The reporting data model is all of the reporting tables. Reporting tables hold the data output from the replication engine. These tables store report-worthy incentive information, maintain its historical information, and facilitate the reporting and participant UI access. Within the reporting data model there are two reporting table types: real and projected. Each type consists of a base transaction reporting table as well as base/derived class variable reporting tables. These reporting tables are the source tables for participant UI pages and reports. Real transactions are actual transactions from the source that are used to calculate official incentive information for payout. Projected transactions are ‘what-if’ transactions that can be created in various ways but their purpose is to simulate an incentive calculation to arrive at a “projected” result. The reporting tables store projected results separate from real results.

Reporting engines are the mechanisms used to replicate incentive calculation results and generate reporting information from the reporting tables. Unlike traditional reporting paradigms where reporting objects are typically populated at the end of the business process as a batch, in Sales Incentive Management these tasks are performed during the incentive calculation process.

As discussed above, UIOs are objects that define the participant UI pages and reports that the system renders to the participant. You attach UIOs to participants and plans on compensation structures. This relationship between compensation structure node, participant, plan, and the UIO is the reporting context. The system uses the reporting context for processing purposes.

Participants can see processing results once the data is replicated to the reporting tables. When a participant accesses their main compensation page, the system, through the participant UI framework, acquires the reporting context and period context for which a participant wants to view incentive data. The participant UI framework then provides a main compensation page for the participant with links to access the participant UIs that the system renders based on the UIOs, reporting context, and period context. Note that while the reporting engines automatically generate the reports, participants can also generate reports manually through the participant UI pages.

Reporting tables are the sole source from which participants can view reporting data. However, compensation administrators can use both the reporting tables and production tables to view and query data. Sales Incentive Management provides a UI for compensation administrators to see what reporting-worthy data resides in the reporting tables and to select which reports you want viewable to participants. Then through the Report Manager interface, compensation administrators can control what incentive information the reporting engines publish and make accessible to participants.

See Also

[Chapter 4, “Registering Base and Derived Classes,” page 77](#)

[Chapter 13, “Working with Compensation Structures,” page 289](#)

[Chapter 5, “Managing User Interaction Objects,” page 91](#)

[Chapter 20, “Managing the Participant Reporting Interfaces,” Using Reporting Infrastructure Engines, page 454](#)

Report Manager

The Report Manager is a user interface for compensation administrators to manage participant reports. It enables you to see what reporting-worthy data resides in the reporting tables, and select which reports you want viewable to participants.

Query Builder

The SIM Query Builder is similar to the PeopleSoft Query Manager, providing a single querying interface that can be leveraged for a number of querying, assignment, editing, and navigation tasks. It provides users (system and compensation administrators) with secure, ad hoc querying capability to create queries of unlimited length and complexity.

Query Builder is a standalone tool built on top of PeopleSoft Query functionality. It can be used to run predefined queries, as well as ad-hoc queries. Many SIM components also use Query Builder for prompting and searching. A key difference between PeopleSoft Query Manager and SIM Query Builder is the query parameters you select. In Query Manager, you select *fields* and *records*, while in Query Builder you specify the *objects*, *attributes*, and *relationships* on which to query.

The SIM Query Manager object model is comprised of two primary metadata objects: the SIM Query Builder Object that interacts with UI components and other PeopleCode entities, and the SIM Query Engine object that translates SIM business object selections and criteria into the PeopleTools Query object mode 1, encapsulating the PeopleTools Query object.

During the SIM reporting process, Query Builder is used extensively by the replication formulas to copy from the internal metadata objects to the reporting tables.

See Also

Chapter 19, “Using Query Builder,” page 425

CHAPTER 3

Defining Sales Incentive Management General Options

This chapter provides an overview of general setup for Sales Incentive Management (SIM) and discusses how to:

- Establish installation options.
- Define product categories.
- Define market rates.
- Establish market rates.
- Define business unit options.
- Define transaction processing states.
- Review delivered sequence numbers.
- Configure load definitions.
- Configure engine rollback specifics.
- Define job process steps.
- Define SIM workflow.
- Review delivered currency codes.
- Define calendars.
- Review delivered country codes.
- Review units of measure (UOMs).
- Set up payment system interface.
- Define SIM user roles.
- Define performance categories.
- Define performance measures.
- Define compensation rollup layers.
- Define SIM table structures.
- Review delivered EIP job definitions.

Understanding General Setup

Sales Incentive Management relies on tables to store the structure and processing rules that drive your system. Before using your system, you need to set up your basic system framework using pages located in the Define Sales Incentive Options menu.

General Options and Corresponding Derived Classes

The table shown lists specific derived classes in the Object Catalog that have the same name as certain general options discussed in this chapter. All these classes are registered in the SIM metadata as derived classes with no base class, and all have a data object type of *Configuration* (the Object Use field on the Object Catalog page stores data object type values).

These classes are not directly tied to the general options definitions in this chapter—instead, their primary use is for the SIM Query Builder. The configuration pages for SIM general options are metadata-aware and accessible to the Query Builder. When you create a query for a general option, Query Builder uses the general options definition metadata to help retrieve the correct information from the system metadata.

General Option Name	Corresponding Derived Class ID
Roles	ROLE
Compensation Rollup Layer	LAYR
Payment Code	PMCD
Performance Category	PGCL
Product Category	MRKT
Transaction States	TRXN

See Also

[Chapter 19, “Using Query Builder,” page 425](#)

Establishing Installation Options

To establish installation options, use the Installation (INSTALLATION_EI) component.

Before you can begin working with the SIM application, you must specify installation options to let the system know how you will use the system and which applications you will use. Installation options are defined for your entire database—they are not specific to a business unit or setID.

See Also

Chapter 3, “Defining Sales Incentive Management General Options,” Establishing Installation Options, page 28

Page Used to Set Up Installation Options

Page Name	Object Name	Navigation	Usage
EIM Products	INSTALLATION_EI	Compensation, Sales Incentives, Define Sales Incentive Options, Installation, EIM Products	Indicate which SIM products you are installing on the system.

Setting Up Installation Options

Access the EIM Products page.



The screenshot shows the 'EIM Products' page with a list of four options, each with a checkbox. The first three options are checked: 'Enterprise Incentive Mgmt', 'Sales Incentive Mgmt', and 'SIM for Banking & Capital Mkts'. The fourth option, 'SIM for High Tech & Industrial', is unchecked.

EIM Products page

During installation, the Installation Wizard selects the Enterprise Incentive Mgmt (Enterprise Incentive Management) and Sales Incentive Mgmt (Sales Incentive Management) check boxes, along with any check boxes for market templates that your organization has licensed. Confirm that these check boxes are properly selected for your SIM installation.

Defining Product Categories

To define product categories, use the Product Categories (EI_PLTFRM) component.

This section provides an overview of product categories and discusses how to set product category values.

Understanding Product Categories

The SIM system is built on a generic foundation designed to support several incentive compensation-related products. To support different products, the SIM system uses the concepts of *foundation*, *product category*, and *market templates*:

- The foundation provides generic features and functionality required by all vertical applications (or incentive management (IM) products) and their corresponding market templates.

As multiple vertical applications can extend the foundation, the Product Categories page is where you specify which vertical applications you are adding, grouped with their associated market templates.

- A product category identifies the specific market addressed by a vertical application within the IM solution set.

For example, SIM is identified by the product category SIM; the SIM product is designed to manage an organization's compensation business processes that are related to sales incentives—commissions, bonuses, splits, and so on.

- A market template identifies specific objects and functionality—incentive plan templates and incentive plans, business objects, reports, and so on—that map compensation business processes that are often found within a specific industry or a market.

For example, the High-Tech and Industrial template provides items and functionality that address sales models that exist within technology-related or industrial enterprises. Each template is thus based upon a specific product category.

All components within SIM are associated with a product category and market template, and have a hierarchy of inheritance. Components that are shared between several templates within SIM are marked with the lowest common denominator category to be shared by the templates on top. For instance, an incentive plan rule that is shared by two different SIM market templates is marked with the product category *SI*.

Note. Sales Incentive Management delivers this page predefined with the field values required for implementation.

Page Used to Set Product Categories Values

Page Name	Object Name	Navigation	Usage
Product Categories	EI_PLTFORM	Compensation, Sales Incentives, Define Sales Incentive Options, Product Categories, Product Categories	Configure the vertical applications and market template products for your SIM system.

Reviewing Product Categories Page Values

Access the Product Categories page.

Product Categories
Foundation EIM

Product Category

Product Category SI ☒ **System Data**

***Description** Sales Incentive Management

Short Description SIM

Market Template Find | View All | First 1-2 of 2 Last

	Market Template	*Description	Short Description		
1	BC	Banking & Capital Markets	BCM	+	-
2	HT	High Tech & Industrial	HTI	+	-

Product Categories page

Product Category	Enter a description and short description for an incentive management product. For implementation of the SIM product, Sales Incentive Management delivers the following values: the Product Category is <i>SI</i> , the Description is <i>Sales Incentive Management</i> , and the Short Description is <i>SIM</i> . This information appears as an available value on numerous pages.
Market Template	Use this section to identify all market templates installed in the SIM Foundation, grouped by their respective product category. Enter a code for the Market Template (up to four characters), and complete the Description and Short Description fields. <hr/> Note. If you develop a custom market template for your SIM implementation, enter its information here. <hr/>

Defining Market Rates

The PeopleSoft approach to market rates and currency conversion is driven by the need to accommodate business practices related to the European Common Currency (euro). In addition to currency exchange rates, PeopleSoft supports the many different types of global market rates, such as interest rates, stock exchange indexes, and economic indicators.

This section discusses how to:

- Define market rate indexes.
- Define market rate types.
- Define market rate tolerances.

Pages Used to Define Market Rates

Page Name	Object Name	Navigation	Usage
Market Rate Index	RT_INDEX_TBL	Compensation, Sales Incentives, Define Sales Incentive Options, Market Rates, Market Rate Index, Market Rate Index	Describe the indices for which you track rates. Typical market rate indexes include LIBOR, Bloomberg foreign exchange, and Reuters foreign exchange. An index categorizes the various market rates that you track.
Market Rate Type	RT_TYPE_TBL	Compensation, Sales Incentives, Define Sales Incentive Options, Market Rates, Market Rate Type, Rate Type	Define market rate types. Rate types include commercial, floating, average, and historical.
Market Rate Definition	RT_RATE_DEF_TBL	Compensation, Sales Incentives, Define Sales Incentive Options, Market Rates, Market Rate Definition, Rate Definition	Define tolerance limits for rates and determine what action should occur if a new rate falls outside the tolerance limit. The fields on this page differ according to the rate category of the market rate index.

Defining Market Rate Indexes

Access the Market Rate Index page.

Market Rate Index

Market Rate Index

Index: MODEL

***Rate Category:** Exchange Rate

***Description:** Default

☒ **Default Exchange Rate Index**

Market Rate Index page

Rate Category

Select a Rate Category from the list: Options include: *Commodity Price, Economic Indicator, Exchange Rate, Futures Price, Interest Rate, Other, Stock Exchange, Index, or Stock Price.*

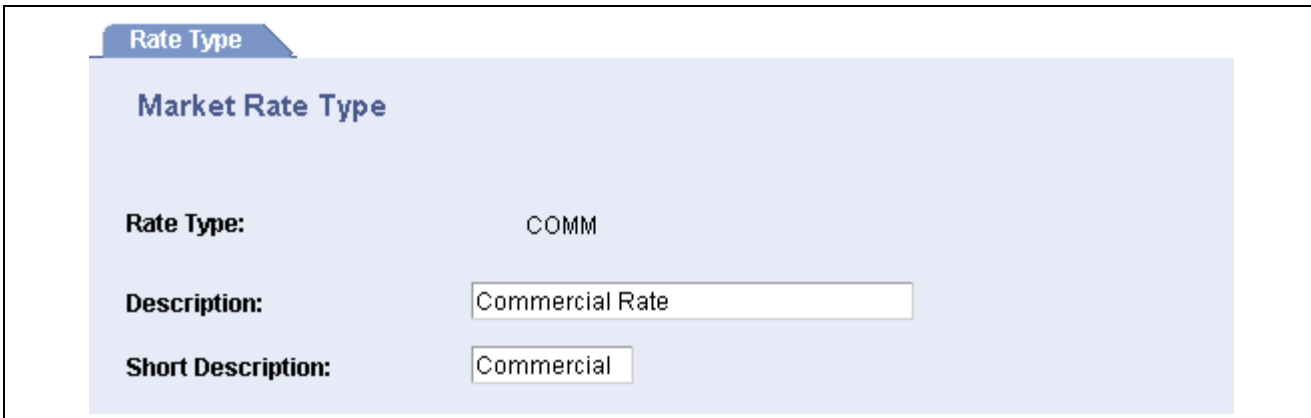
Default Exchange Rate Index

If you are entering *Exchange Rate* indexes, select the Default Exchange Rate Index check box to indicate which index should be used to retrieve currency exchange rates. You can specify only one index code as the default.

Note. Typical indices include LIBOR, Bloomberg foreign exchange, and Reuters foreign exchange. An index categorizes the various market rates that you track.

Defining Market Rate Types

Access the Market Rate Type page.



The screenshot shows a web-based form for defining market rate types. At the top, there is a blue tab labeled "Rate Type". Below the tab, the title "Market Rate Type" is displayed in a large, bold font. The form contains three fields: "Rate Type" with the value "COMM", "Description" with the value "Commercial Rate", and "Short Description" with the value "Commercial".

Market Rate Type page

Enter a description and short description for each market rate type you use.

Defining Market Rate Tolerances

Access the Market Rate Definition page.

Rate Definition

Market Rate Definition

Index:MODELDefault

Rate Category:Exchange Rate

From Currency Code:AED

Refresh

Rate Definition

Find | View AllFirst1-6 of 6Last

Term	From Currency	To Currency	Maximum Variance	*Error Type	
0	AED	USD	2.50	Warning	+ -
0	AED	CAD	2.50	Warning	+ -
0	AFN	USD	2.50	Warning	+ -
0	AFN	CAD	2.50	Warning	+ -
0	ALL	USD	2.50	Warning	+ -
0	ALL	CAD	2.50	Warning	+ -

Market Rate Definition page

Note. The information you see on this page depends on the type of index that you select. For example, if you select an index with interest rates, you see interest rates on this page.

Market rate definitions specify the valid term, currency, and other appropriate field combinations for market rates. For example, if you have a market rate definition for an exchange rate with a term of 30, a from currency of *EUR*, and a to currency of *USD*, you can enter a rate using this combination in the market rate table. If you do not have a market rate definition, the system creates one for you using the default values.

- From Currency Code

Enter the from currency code.
- Refresh

Click the Refresh button to limit the display to the specified from currency code.
- Term

Enter the desired term (expressed in days). A zero term indicates a spot rate.
- From Currency

Enter the appropriate from currency. This value is used with the to currency value as part of an exchange rate pair. When you use triangulation, include a definition for each of the currency pairs involved in the triangulation.
- To Currency

Enter the appropriate to currency. This value is used with the from currency value as part of an exchange rate pair.
- Maximum Variance

Indicate the percentage of variance that is allowed when the user maintains the market rate. You get an error message if the change exceeds the tolerance. The default value is 2.50 (2.5%).
- Error Type

Enter the type of error processing that should occur if the maximum variance is exceeded:

None: No error processing occurs, and the new rate is used even though it exceeds the limit.

Stop : Processing halts, and the system prevents you from saving the new rate.

Warning : Default value. A warning appears; you can ignore it and save the new rate.

Establishing Market Rates

This section describes how to:

- Define market rates.
- Establish rate definitions.
- Maintain exchange rates.
- Load market rates.

Pages Used to Establish Market Rates

Page Name	Object Name	Navigation	Usage
Market Rate	RT_RATE_PNL	Compensation, Sales Incentives, Define Sales Incentive Options, Market Rates, Market Rate Value , Market Rates	Define market rates.
Rate Definition	RT_RATE_DEF_SEC	Click the Rate Definition link on the Market Rate page.	Establish rate definitions.
Exchange Rate Detail	EXCH_RT_DTL	Click the Exchange Rate Detail button on the Market Rate page.	Maintain exchange rates.

Defining Market Rates

Access the Market Rate page.

Market Rate page

Enter the rate as of the effective date.

Rate The Rate field displays the *visual rate* or, in the case of triangulated exchange rates, the *primary visual rate*. The visual rate is typically the cross rate, but it can also be one of the other component rates of the triangle.

You can edit the rate for non-triangulated rates and for triangulated rates if a quotation method has been defined for the currency pair and the Cross rate Allow Override check box is selected on the Currency Quotation Method page. If an override is not allowed, you can update the exchange rate values to and from the reference currency on the Exchange Rate Detail page.

Changing a Triangulated Cross Rate

If you change a triangulated cross rate, the system recalculates one of the component rates. This can result in the cross rate being recalculated that is slightly different from the one that you entered. For example, you start with a triangulated rate of RM = 6.80000000 and RD = 1.25000000 for a cross rate of 5.44000000. If you change the cross rate to 5.43550000:

- The system first recalculates RD = 1.25103486.
- The system then recalculates the cross rate to 5.43550001 based on the first recalculation.

In rate maintenance, you have no choice but to accept the recalculation. However, in a situation such as journal entry, a warning message gives you the opportunity to override triangulation and to use the exact rate that you entered, which results in the rate being stored as RM = 5.43550000 and RD = 1.

You can edit the Rate field except when *all* of these conditions are true:

- The rate is triangulated.
- The primary visual rate is the cross rate.
- The Allow Override check box on the Currency Quotation Method page is cleared for the exchange rates quotation method.

Note. Typically, you do not maintain triangulated exchange rates online. Instead, maintain the rates of the *from* currency to the *reference* currency and the *reference* currency to the *to* currency, then run the Cross rate Reciprocal SQR (EO9030.SQR) to define the triangulated exchange rates.

Reciprocal Currency Pairs

If a quotation method has been defined for the currency pair and if the Auto Reciprocate check box is selected, creating or maintaining a rate for a currency pair automatically creates or updates the rate of the reciprocal currency pair. For example, if you change the USD to GBP rate, the GBP to USD rate automatically updates. You can only automatically reciprocate currency pairs for which quotation methods have been defined.

If a rate definition does not already exist for the currency pair, one will be automatically created with the default values of 2.5 percent maximum variance and warning message processing.

Establishing Rate Definitions

Access the Rate Definition page.

Term	From Currency	To Currency	Maximum Variance	*Error Type
0	AUD	DEM	2.50	Warning

OK Cancel

Rate Definition page

Maximum Variance

You can modify the Maximum Variance, the percentage of variance allowed when you maintain the market rate. If the change exceeds the tolerance, an error results. The default value is 2.50 (2.5 percent).

Error Type

You can modify the type of error that results when the tolerance defined in the Maximum Variance field is exceeded during data entry. Error type values are:

None: No error processing occurs. The new rate is used even though it exceeds the limit.

Stop : Processing halts. The system prevents you from saving the new rate.

Warning: A warning displays. You can ignore it and save the new rate.

Note. The results of changing the rate definition do not take effect until you save the Market Rate page.

Click OK to return to the Market Rate page.

Maintaining Exchange Rates

Access the Exchange Rate Detail page.

Exchange Rate Detail

Rate Quotation Basis:Direct

Quote Units:1

Triangulate:N

Reference Currency:

Current Quote

1 AUD = 1.28447398 DEM

Historic Quote

Not Applicable

Exchange Rate

From	To	Rate
AUD	DEM	1.28447398

OK

Cancel

Exchange Rate Detail page

The read-only fields include:

Rate Quotation Basis	Displays the quotation basis for the exchange rate as it is defined on the Currency Quotation Method page. If no quotation method is defined, the quotation basis is <i>Direct</i> .
Quote Units	Displays the quote units for the exchange rate as defined on the Currency Quotation Method page. If no quotation method is defined, the quote unit is <i>1</i> .
Triangulate	Displays the triangulated setting for the exchange rate as it is defined on the Currency Quotation Method page. If no quotation method is defined, the triangulated setting is <i>N</i> .
Reference Currency	Displays triangulated exchange rates only, and shows the reference currency used in the triangulated exchange.
Current Quote	<p>Displays the current exchange rate used to convert the from currency to the to currency. A direct, non-triangulated rate shows quote units (or 1) on the left side of the equal sign and the visual rate on the right. For example: 1 USD = 1.40000000 CAD.</p> <p>A triangulated rate displays two component rates of the triangle: the rate for converting the from currency to the reference currency, and the rate for converting the reference currency to the to currency.</p>
Historic Quote	Displays a quote to indicate the quotation method originally used by a historic exchange rate if the system determines that the original quotation method

of the historic rate differs from the current quotation method. This field displays the following values:

- A quote if the historic rate has converted the from currency to the to currency directly using a calculated reciprocal rate, but the current quotation method for the currency pair is now indirect.
- A quote, if the historic quote method were non-triangulated and the current quote method is triangulated.
- *Not Applicable* if the system does not determine that the historic and current quote methods are different.

Exchange Rate

Displays a single visual rate for non-triangulated exchange rates or displays all three component visual rates for triangulated exchange rates. The cross rate for triangulated exchange rates is editable only if the Allow Override check box is selected in the exchange rate's quotation method definition.

Loading Market Rates

Market rates can be loaded to the RT_RATE_TBL table from any external source using the Ascential DataStage extract, transform, and load (ETL) tool.

Note. Use the Market Rate page to verify that the market rates were loaded correctly.

See Also

Chapter 9, "Loading Data," page 193

Defining Business Unit Options

To define business unit options, use the Business Units (BUS_UNIT_TBL_PF) and Business Unit Mapping (EI_BU_SRC_TBL) components.

This section provides an overview of business units and discusses how to:

- Define business units.
- Create setIDs.
- Modify tableset control information.
- Define business unit and setID security.
- Map source transaction business units.

Understanding Business Units

In PeopleSoft applications, a business unit is the smallest organizational entity that can maintain business transactions. A business unit defines a level of control that is significant and appropriate to the application you use. Business units can be independent legal entities that need to segregate their financial data for accounting purposes, or operational centers that segregate their operations for management purposes. You can share business units across any combination of PeopleSoft applications or define them within just one application.

SIM Business Units

Sales Incentive Management uses business units as compensation objects within compensation structures to define a structure's default calendar and currency: the first (root) level of a compensation structure is the business unit of the structure. Child objects on the structure inherit the currency defined for the business unit, which is used for calculations and business unit reporting.

Each business unit within SIM is autonomous from a compensation point of view; each unit can be managed and handled as an individual entity within the enterprise. Each business unit can process compensation incentives separately and independently from the other, and each may operate on a different currency. Since business units are autonomous entities, multiple business units can be processed simultaneously.

SIM enables compensation structures to be linked to other structures: the root node business unit of each structure is an autonomous entity and can use a different calendar and currency if required.

Business Units, Tablesets, and Tableset Sharing

As you establish your business units, tableset sharing is being set up behind the scenes. Tableset sharing:

- Shares control table information and processing options among business units.
- Minimizes redundant data and system maintenance tasks.

You can define a tableset in one of two ways:

- By adding a business unit and automatically creating a corresponding tableset with the same name.
- By adding an independent tableset through the PeopleTools Utilities, TableSet ID page.

When you create a business unit, it is automatically linked to each record group in the system that you are using. This is the beginning of tableset sharing.

As you define a new business unit, you are prompted for a default setID. The default setID determines your preliminary tableset sharing setup by assigning setIDs to each record group for the new business unit. The setID assigned to a record group determines which tableset provides the valid values for that business unit.

Note. To maximize system performance, always use exactly five characters when creating setIDs or business units.

You can either copy the tableset sharing setup of an existing business unit or create a generic tableset sharing setup for the new business unit you are creating.

Sharing tableset information enables you to:

- Promote efficiency and maintain consistency across business units. You do not need to set up as many tables during implementation and have fewer tables to maintain when operational.
- Use tablesets to control static information.
- Have all your business units share the same calendars. To do this, you create calendars in an independent setID and reference that setID in the TableSet control value.

The tableset ID (also called setID) stores most data recorded in the dimension tables. Whenever you enter information in a control table, you must enter the setID to establish the ownership of that information. A grouping of data that is keyed by the same setID is called a tableset.

SetIDs and Business Units

At the tableset level you store information such as structures, descriptions, codes, and processing rules. At the business unit level you store transaction data such as sales orders, inventory stock, invoices, vouchers, payments, assets, and journal entries.

SetIDs provide access to reusable pieces of information. They also control static information. Business units control transaction or results information. This information is dynamic and is subject to frequent changes.

On the TableSet Record Group Control page, you specify the setID and establish a business unit to use for each record group. You can specify a single setID for all record groups or a combination of any number of setIDs.

In the case of setIDs and business units, remember:

- Each business unit must point to a complete set of dimension tables in order for it to function.
- Each business unit can use, or share, dimension tables from one or more tablesets.
- A single tableset does not have to include data for all of the required dimension tables.
- The set control value points to a business unit.

Copying a TableSet Sharing Setup

If you want the tableset sharing for a new business unit to match another business unit, enter the business unit that you want to mirror as the default setID. When you create the new business unit, and it is linked to the record groups in your system, the system assigns each record group the same setID as used for that record group by the copied business unit.

Generic TableSet Sharing Setup

To define a generic tableset sharing setup for a new business unit, enter the name of the new business unit as the default setID. When you save the business unit, the system creates a new setID with the same name as the business unit and assigns that setID to each record group for the new business unit.

Tableset sharing is set up as soon as you create your business units. However, the sharing, especially if you have created a generic tableset sharing setup, may need some fine tuning.

Adjusting TableSet Sharing

You adjust tableset sharing by changing the setIDs that are assigned to individual record groups.

First access the PeopleTools, Utilities, Administration, TableSet Control – Record Group page. Here you can change the default setID or adjust it for individual record groups.

Warning! Remember that most record groups contain a number of tables and views. Therefore the setID that you assign to that record group must represent the information that you want to use from each of the control tables contained in that record group.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer* for details on tablesets.

Implementation Considerations

When implementing business units in Sales Incentive Management, consider these key points:

- All business units and setIDs should be five characters long.
- Business units are a means of organizing data.
- Business units have only one base currency.

- Business units drive transaction information.
- Business units drive security.
- You define currencies and calendars by business unit.

Also consider the following questions:

- What are the management reporting requirements?
- Will each unit produce reports and analyze data independently?
- Will analysis be completed in one location?
- What currency issues do you have?

Currency translation will hinge on where the analysis is to be done and business units are only allowed one base currency.

- What security issues does the organization have?

Source Business Unit Mapping

Business unit mapping is used to facilitate the data loading from source systems. The Extract, Transform, and Load (ETL) process uses the Source Unit Mapper table to convert source system business unit data to the mapped performance business unit. If you do not specify entries in this table, the ETL process will not copy the source business unit to the target tables. EIM data load jobs use the following Business Unit Source tables: BUS_UNIT_TBLRSF, BUS_UNIT_TBL_HR, and BUS_UNIT_TBL_BI.

EIM ETL Maps	Business Unit Source Tables
CRM890_RBPERSN_EIPCPNPERSSTG_Sequence	BUS_UNIT_TBLRSF
CRM890_RSFTERRITORY_EICOMPSTRSTGNODE_Sequence	BUS_UNIT_TBLRSF
CRM890_RSFTERRITORY_EICOMPSTRSTGROOT_Sequence	BUS_UNIT_TBLRSF
CRM890_RSFTRCUSTOMER_EICSTRCHLDSTG_Sequence	BUS_UNIT_TBLRSF
CRM890_RSFTTRINDUSTRY_EICSTRCHLDSTG_Sequence	BUS_UNIT_TBLRSF
CRM890_RSFTRPRODUCT_EICSTRCHLDSTG_Sequence	BUS_UNIT_TBLRSF
CRM890_RSFTRREGION_EICSTRCHLDSTG_Sequence	BUS_UNIT_TBLRSF
CRM890_RSFTRTEAM_EICSTRCHLDSTG_Sequence	BUS_UNIT_TBLRSF
CRM890_RSFSUSERQUOTA_EIVARIABLESTG_Sequence	BUS_UNIT_TBLRSF
HCM890_DEPTTBL_EICOMPSTRSTG	BUS_UNIT_TBL_HR
HCM890_JOB_EICSTRCHLDSTG	BUS_UNIT_TBL_HR

EIM ETL Maps	Business Unit Source Tables
HCM890_PERSON_EIPCPNPERSSSTG	BUS_UNIT_TBL_HR
SCM890_CUSTDATA_EITOBASESTG	BUS_UNIT_TBL_BI
SCM890_ORDLINE_EITOBASESTG	BUS_UNIT_TBL_BI
SCM890_SHIPINFINV_EITOBASESTG	BUS_UNIT_TBL_BI

Data must exist in the Business Unit source table in order to be able to use it for mapping. For example, BUS_UNIT_TBL_BI is used in the SCM890_ORDLINE_EITOBASESTG job (maps order data from Supply Chain). Your source business unit must exist on the BUS_UNIT_TBL_BI before you can use it in the Source Unit Mapper.

See Also

[Chapter 13, “Working with Compensation Structures,” page 289](#)

[Chapter 3, “Defining Sales Incentive Management General Options,” Setting Up Currency Codes, page 54](#)

Pages Used to Define Business Unit Options

Page Name	Object Name	Navigation	Usage
Business Unit	BUS_UNIT_TBL_PF1	Compensation, Sales Incentives, Define Sales Incentive Options, Business Units, Business Unit	Define general and default settings for business units.
TableSet Control	SETID_TABLE	PeopleTools, Utilities, Administration, TableSet IDs, TableSet Control	Create setIDs for tableset sharing.
Record Group	SET_CNTRL_TABLE1	PeopleTools, Utilities, Administration, TableSet Control, Record Group	Modify tableset control information.
Source Business Unit Mapper	EI_BU_SRC_TBL	Compensation, Sales Incentives, Define Sales Incentives, Business Unit Mapping, Source Unit Mapper	Map source business units to Sales Incentive Management business units.

Defining Business Units

Access the Business Unit page.

Business Unit

Business Unit GBIBU

Description GBIBU *** As of Date** 01/01/1900

Short Desc GBIBU

***Base Currency** US Dollar

***Rate Type** Current Rate

Default Properties

Calendar ID Monthly Calendar - 01

Holiday Calendar

Business Unit Type

☐ Consolidated

☐ Non-Processing

Last Batch Number

Business Unit page

Enter a description, as of date, and short description.

Base Currency	The primary currency for the business unit. A business unit can have <i>only one</i> base currency. This is usually the local currency for the organization, but accounting rules or other circumstances might dictate that it be different.
Rate Type	Select the rate type for currency conversion to be used by the business unit.
Calendar ID	Specify the default calendar for this business unit. This calendar ID appears as the default for the business unit on subsequent pages; however, you can override it.
Holiday Calendar	Not used by Sales Incentive Management.
Consolidated	Not used by Sales Incentive Management.
Non-Processing	Select this check box to create a business unit without stored set control values. The Create BU button will disappear when you select this check box. (Not recommended for Sales Incentive Management use.)
Last Batch Number	Not used by Sales Incentive Management.
SetID	When you are adding a business unit, you see a drop-down list box to specify a default setID. This setID is used for tableset sharing. You can select an existing setID for which you want this business unit to share tables or leave the field blank, in which case the system creates a setID with the same ID as the business unit when you click the Create BU button.
Create BU	Displays on adding a business unit. Click this button when you have entered your data to add the business unit to the system.

See Also

Chapter 3, “Defining Sales Incentive Management General Options,” Defining Business Unit Options, page 39

Creating SetIDs

Access the TableSet Control page.

You can create a setID on this page if you have not already created one when creating a business unit. You can create one setID that doesn't match any of your business units and use that setID to key information that is generic throughout your system. The rest of your setIDs can match the business unit with which they will be used. This method can help eliminate confusion.

Refer to your PeopleTools documentation for details.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer, "Planning Records, Control Tables, and TableSets.

Modifying Tableset Control Information

Access the TableSet Control - Record Group page.

Here you can modify any tableset record group controls as required.

Defining Business Unit and SetID Security

The Business Unit and SetID Security page enables you to give access to specific business units and setIDs to a particular user ID. You then set certain user IDs as your compensation administrators, depending on which business units and setIDs they require access to.

As compensation structures are associated with a single business unit at the root node level, assigning unique access to each of your user IDs adds a layer of security. To access a specific compensation structure, a compensation administrator (or user) must use a specific user ID.

See Also

Chapter 6, "Setting Up Security," Defining Compensation Administrator Security Access, page 147

Mapping Source Transaction Business Units

Access the Source Business Unit Mapper page.

Source Unit Mapper

Source Business Unit Mapper

Customize | Find | View 2 | First 1-12 of 12 Last

	Table Name	Business Unit	As Of Date	IM Business Unit		
1	BUS_UNIT_TBL_BI	CORP1	01/01/2003	CORP1	+	-
2	BUS_UNIT_TBL_BI	GBIBU	01/01/2003	GBIBU	+	-
3	BUS_UNIT_TBL_BI	US200	01/01/2003	CORP1	+	-
4	BUS_UNIT_TBL_FS	CORP1	01/01/2003	CORP1	+	-
5	BUS_UNIT_TBL_FS	GBIBU	01/01/2003	GBIBU	+	-
6	BUS_UNIT_TBL_FS	US200	01/01/2003	CORP1	+	-
7	BUS_UNIT_TBL_HR	CORP1	01/01/2003	CORP1	+	-
8	BUS_UNIT_TBL_HR	GBIBU	01/01/2003	GBIBU	+	-
9	BUS_UNIT_TBL_HR	US200	01/01/2003	CORP1	+	-
10	BUS_UNIT_TBLRSF	CORP1	01/01/2003	CORP1	+	-
11	BUS_UNIT_TBLRSF	GBIBU	01/01/2003	GBIBU	+	-
12	BUS_UNIT_TBLRSF	US200	01/01/2003	CORP1	+	-

Source Business Unit Mapper page

When you set up your system, it is important to map your source structure to the Sales Incentive Management business unit structure you've defined. Part of this mapping involves specifying how your source operational business units map to your newly defined strategic Sales Incentive Management business units (IM business units). You use the Source Unit Mapper page to achieve this goal quickly. The Extract, Transform, and Load (ETL) process uses this table to convert your business units.

After you have mapped your business unit structure, the data that was once tied to business units in your source system is applied to the IM business units as specified on this page. This page is used for all business units coming into the system through an ETL process.

To map a source business unit, simply enter the as of date after which you want to make the mapping to be effective and specify the IM business unit. You must map all business units and tables so that each table is mapped to a business unit. The table that needs to be mapped to the business unit is based on the table the business unit was created for.

Note. All of the fields on this page are required.

Defining Transaction Processing States

To define transaction processing states, use the Transaction Processing States (EI_TRSXN_LEVEL) component.

This section provides an overview of transaction processing states and discusses how to define them.

Understanding Transaction Processing States

Transactions have processing states that are referenced in incentive plans and that help track the movement of the transaction through the SIM system. Transaction processing states are used, along with transaction type and performance measure, to define the transactions that are processed by a plan section. (Transaction processing states are also sometimes called “transaction levels.”) Incentive plan rules change the value of the transaction processing state to signify that the transactions are ready for the next phase of processing. For example, a Credit section may process all transactions at state 100 (“Ready for Credit”) and then use the Promote formula to change the transaction processing state to 200 (“Ready for Rollup”). You can define transaction processing states with product category and market template information. This enables you to specify global processing states or restrict certain processing states to a specific product category and market template.

Sales Incentive Management delivers transaction processing states in the sample database, all of which have a defined Product Category value of *Sales Incentive Management*. Some also have a defined Market Template value of *High Tech & Industrial* or *Banking & Capital Markets*. You can use these delivered transaction processing states as examples when you develop your own.

Page Used to Define Transaction Processing States

Page Name	Object Name	Navigation	Usage
Transaction Processing States	EI_TRXN_LEVEL	Compensation, Sales Incentives, Define Sales Incentive Options, Transaction Processing States, Transaction Processing States	Define sequential processing states to track incentive transaction movement in the SIM system.

Define Transaction Processing States

Access the Transaction Processing States page.

Select a transaction state, which is a sequential number assigned to transactions that indicates where the transaction is in the processing cycle. Delivered values are: *Ready for Credit*, *Held for Shipment*, *Ready for Rollup*, *Duplicate*, *Ready for Calculation*, *Ready for Payout*, *Ready for Posting*, *Complete*, and *Continue*.

Product Category	Select <i>Sales Incentive Management</i> .
Market Template	Select the appropriate market template. Values are: <i>High Tech & Industrial</i> or <i>Banking and Capital Markets</i> .
Change Allowed	If selected, transactions marked with this transaction state can be edited on the Update Order Transaction page.
Split Allowed	If selected, transactions marked with this transaction state can be edited on the Create Split page.

Sales Incentive Management delivers these transaction processing state values:

Transaction Processing State	Description
100	Ready for Credit
110	Held For Shipment
200	Ready for Rollup
250	Duplicate
300	Ready for Calculation
400	Ready for Payout
500	Ready for Posting
600	Complete
998	Continue Note. Transaction Processing State 998 is used for skipping a section. It is used in conjunction with the ProcessInSection formula. 998 is used as a filter for any section that is reach via the ProcessInSection. This ensures that the only access to the section is via the ProcessInSection.

These states work in conjunction with the logic in the plan templates, so it is suggested that you do not modify the numbers. The plans use the transaction processing state to determine which transactions should be processed within a section. For example, 100 should remain “Ready for Credit” so that the plan CREDIT step pulls in the correct transactions. You can modify the value of the check boxes (change allowed, split allowed) to reflect your needs and you can add additional transaction processing states if you need them for your custom plan rules.

Reviewing Delivered Sequence Numbers

To define sequence numbers, use the Sequence Numbers (EI_SEQUENCE) component.

This section provides an overview of number sequencing and discusses how to set up sequence numbers.

Understanding Number Sequencing

Sequence numbering functionality is used to facilitate various processes in the system. Several components use the Sequence table to assign key values to data. For example, when you create a new variable within a plan, the Plan editor pulls the next available sequence number from the sequence table and assigns it to the new variable, then it increments the value in the Sequence table.

You can specify number sequencing functionality for class IDs, defining starting, incremental, and maximum values to recalculate and reset class ID numbers. Sequences can be *global* or *local*. A global sequence number is not specific to any class ID, and the class ID value is set to *Null* in the SIM Sequence record (EI_SEQ_TBL). A local sequence number has a specific class ID set for the Sequence Number field (EI_SEQ_NUM) of the SIM Sequence record. If a global sequence name exists, you cannot enter a new global or local sequence name using the existing global sequence name. However, you can create a new local sequence name for a specific class ID using an existing local name of another class ID. In the plan variable example above, class ID PVAR is incrementally increased whenever a new variable is created.

Sales Incentive Management delivers the Sequence Numbers page predefined with initial values. But you may want to reset the sequence number functionality to differentiate the sequence numbering of new transactions from your existing source system transaction data. This will enable you to distinguish the “original” legacy system transactions from the “new” Sales Incentive Management transactions.

Page Used to Set Up Sequence Numbers

Page Name	Object Name	Navigation	Usage
Sequence Numbers	EI_SEQUENCE	Compensation, Sales Incentives, Compensation, Define Sales Incentive Options, Sequence Numbers, Sequence Numbers	Define start, incremental, and maximum values for a global or local sequence number.

Set Up Sequence Numbers

Access the Sequence Numbers page.

Class ID	To define a local sequence number to a field on a specific base object or derived object, enter the class ID of that object. If defining a global sequence number, this field remains blank. Any component that uses this table needs to use the class ID to access the appropriate row on the table.
Sequence Name	Enter the field name to which you want to associate an incremental sequence number.
Sequence Number	Enter the number from which the system should begin the sequence numbering.
Initial Value for Sequence	Enter the initial value amount, usually 1.
Increment by for Sequence	Enter the incremental number amount, usually 1.
Maximum Sequence Number	Enter the maximum incremental number allowed, such as 999999999999999. This field holds fifteen characters but should not overflow the field that is storing the sequence itself.

Configuring Load Definitions

The Configure Load Steps page is part of the staged data loading Application Engine process (EI_LOAD_STG), which transfers data from the SIM staging tables to the SIM production tables.

See Also

[Chapter 7, “Setting Up Engine Processing,” Configuring Load Definitions, page 153](#)

[Chapter 9, “Loading Data,” Loading Reference and Participant Data from Staging Tables to Production Tables, page 202](#)

Configuring Engine Rollback Specifics

Use the Rollback Groups and Rollback Definitions pages to define objects reset by the SIM Engine during rollback processing.

See Also

[Chapter 7, “Setting Up Engine Processing,” Specifying Engine Rollback Definitions, page 157](#)

Defining Job Process Steps

Use the Step Definition page to define processing steps for the SIM Engine.

See Also

[Chapter 7, “Setting Up Engine Processing,” Defining Process Steps, page 159](#)

Setting Up SIM Workflow

To set up workflow, use the Transaction Workflow (EI_WF_CONF) and Process Control Workflow (EI_WF_CONF_PCM) components.

This section provides an overview of workflow, lists prerequisites, and discusses how to:

- Configure transaction workflow.
- Configure process control workflow.

Understanding Workflow in Sales Incentive Management

You can use the Configure Transaction Workflow page to establish workflow to alert individuals (such as managers) that an edited transaction needs their approval. When a compensation administrator (or other user) changes an amount on a transaction's attribute that is configured with workflow, the system triggers workflow. The system sets the transaction's status to *Pending* and sends a worklist and an email to the role ID specified for approval or denial. The SIM Engine process only approved transactions. If the amount exceeds the manager's set maximum amount, the system routes the transaction to the next individual in the transaction approval hierarchy for approval or denial.

Sales Incentive Management delivers predefined values to configure workflow only for transaction approval. You can use PeopleTools Application Designer and PeopleTools Workflow functionality to develop workflow values unique to your organization's business processes. Then use the Process Control Workflow page to configure the workflow for the business process.

See Also

Chapter 13, "Working with Compensation Structures," page 289

Enterprise PeopleTools PeopleBook: Workflow Technology

Prerequisites

To facilitate SIM workflow, the system uses information specified on the SIM User Roles page as well as email address information specified on the PeopleTools User Profile pages. Prior to configuring SIM workflow, confirm that this information is defined.

Page Used to Set Up SIM Workflow

Page Name	Object Name	Navigation	Usage
Configure Transaction Workflow	EI_WF_CONF	Compensation, Sales Incentives, Define Sales Incentive Options, Transaction Workflow, Configure Transaction Workflow	Configure workflow transaction approval for specific edited class ID attributes.
Configure Process Control Workflow	EI_WF_CONF_PCM	Compensation, Sales Incentives, Define Sales Incentive Options, Process Control Workflow, Configure Process Control Workflow	Configure workflow for your organization's business processes other than ones relating to transactions types.

Configuring Transaction Workflow

Access the Configure Transaction Workflow page.

Configure Transaction Workflow

Business Unit GBIBU **Class ID** EORD Orders

Business Process

***Description** Transaction Approval Limits ***Business Process** EI_ADMIN_APPROVAL

***Activity Name** EI_APP_TRANS ***Event Name** EIM Trans Approval

Attribute Details Find First 1-4 of 4 Last

***Attribute Name** Attainment Amount

Role Details First 1 of 1 Last

*Role ID	Description	Max Approval Amount
1 MANAGER1	Sales Manager	99,999,999,999,999,999.000

***Attribute Name** Compensation Amount

Role Details First 1-2 of 2 Last

*Role ID	Description	Max Approval Amount
1 MANAGER1	Sales Manager	5,000.000
2 REGIONMGR1	Regional Manager	99,999,999,999,999,999.000

Configure Transaction Workflow page (1 of 2)

***Attribute Name** Payout Amount

Role Details First 1-2 of 2 Last

*Role ID	Description	Max Approval Amount
1 MANAGER1	Sales Manager	5,000.000
2 REGIONMGR1	Regional Manager	99,999,999,999,999,999.000

***Attribute Name** Sales Amount

Role Details First 1 of 1 Last

*Role ID	Description	Max Approval Amount
1 MANAGER1	Sales Manager	99,999,999,999,999,999.000

Configure Transaction Workflow page (2 of 2)

When adding a workflow approval for a transaction type, select the business unit and transaction type for which you want to define the workflow. The transaction type class ID includes the attributes that you want to set the workflow for. This determines the values available on the Attribute Name Search Results page.

Business Process

Business Process Select *EI_ADMIN_APPROVAL*.

Activity Name Select *EI_APP_TRANS*.

Event Name Select *EIM Trans Approval*.

Attribute Details

Attribute Name	Select the specific attribute on which to configure workflow transactional approval. For example, if you specify the class ID of <i>Orders (EORD)</i> , you could configure workflow on the <i>Compensation Amount</i> attribute.
Role ID and Max Approval Amount (maximum approval amount)	<p>Enter the role details in these fields.</p> <p>Select the ID with the authority to approve the entered maximum approval amount. When you enter a maximum approval amount and save the page, the currency code of the business unit's base currency appears.</p> <p>You can add rows to build an “approval hierarchy” for this workflow ID. If the actual amount exceeds the specified maximum amount for a role ID, the system sets the approval status to <i>Pending</i> and routes the approval to the next role ID in the hierarchy.</p>

Configuring Process Control Workflow

Access the Configure Process Control Workflow page.

Configure Process Control Workflow

Business Unit

GBIBU

Workflow ID

DOCUMENTATION

Business Process

*Description

Documentation Approval

*Business Process

Administer Workflow

*Activity Name

Send Note

*Event Name

Email Note

Configure Process Control Workflow page

Upon entering this component, specify the business unit for which you want to create a workflow and the workflow ID. Enter a description for the workflow, then associate workflow with a business process, activity, and event. Use PeopleTools Application Designer and PeopleTools Workflow functionality to develop the business process, activity, and event values unique to your organization’s business processes. Then use this page to configure the workflow for the business process.

Reviewing Delivered Currency Codes

To review delivered currency codes, use the Currency Code (CURRENCY_CD_TABLE) component.

- PeopleSoft applications use a currency code to track individual currencies. A business unit uses only one currency, called a base or “book” currency, which is assigned to each business unit in the system.
- In SIM, the currency assigned to the business unit at the root of a compensation structure determines the currency used by all child objects on that structure; this base currency is used for incentive processing and reporting. Business units defined on linked compensation structures can use a different currency.
- In SIM, the system converts the currency amount of a transaction into the base currency of the transaction’s business unit when it loads the transaction. From that point forward, all calculations are in the base currency. The next currency conversion happens when payouts are calculated, as a participant can have a different currency than the business unit’s base currency.

Sales Incentive Management delivers the Currency Code page with predefined currency codes. In most cases, you do not have to add any information to this page.

See Also

Enterprise PeopleTools PeopleBook: Global Technology, “Market Rates and Currency Conversion”

[Chapter 3, “Defining Sales Incentive Management General Options,” Defining Business Units, page 43](#)

[Chapter 3, “Defining Sales Incentive Management General Options,” Reviewing Country Codes, page 61](#)

Page Used to Set Up Currency Codes

Page Name	Object Name	Navigation	Usage
Currency Code	CURRENCY_CD_TABLE	Compensation, Sales Incentives, Define Sales Incentives, Currency Code, Currency Code	Define SIM currency codes.

Setting Up Currency Codes

Access the Currency Code page.

Currency Code

Currency Code: USD

Definition Find | View All First 1 of 1 Last

*Effective Date:	01/01/1900	*Status:	Active
*Description:	US Dollar		
Short Description:	Dollar		
Currency Symbol:	\$		
Country:	USA United States		
Decimal Positions:	2		
Scale Positions:			

Currency Code page

An effective date, status, description, and short description display.

Note. The data on this page is stored in the Currency Code table. The values on this table are effective-dated. PeopleSoft ships the Currency Code table in compliance with ISO standards for decimal positions. You can increase the number of decimals to a maximum of three.

Currency Symbol	PeopleSoft delivers many currencies with a currency symbol such as \$ for Australian dollar (AUD) or £ for British pound (GBP). You can enter new symbols for delivered currencies or for currencies that you might add.
Country	Code for the country from which the currency originates.
Decimal Positions	Enter the number of decimal positions that should appear in the notation for the currency. For example, there are two decimal positions for Australian dollars (5.00 AUD), but no decimal positions for Japanese yen (500 JPY).
Scale Positions	Enter the scale positions you want to round for this currency. This controls how many numbers appear to the left of the decimal when displayed. The data is actually stored with full precision in the database itself. For example, if you want all million-dollar amounts displayed as the number of millions without the zeros, enter 6 as your scale position. In this case, 24,000,000 is displayed as 24, but is stored in the database as 24,000,000.

Note. PeopleSoft updates the Currency Code table and the fully populated country, state, and province code tables as national boundaries and designations change.

See “PeopleSoft Enterprise Sales Incentive Management Preface,” page xxix.

See Also

Enterprise PeopleTools PeopleBook: Global Technology, “Controlling Currency Display Format”

Defining Calendars

To define calendars, use the Calendars (DETAIL_CALENDAR), Frequency Definition (PF_FREQUENCY_DEFN), and Calendar Frequencies (PF_FREQUENCY_DTL) components.

This section provides an overview of calendars and discusses how to:

- Set up calendars.
- Set up calendar frequency definitions.
- Set up calendar frequencies.

Understanding Calendars

In PeopleSoft applications, a calendar is a collection of period definitions that is further defined by calendar frequencies. In SIM, incentive payouts are associated with a specific time frame to indicate when the payout was earned.

Calendars and frequencies in SIM define the life span of incentive plan templates, the plans derived from templates, and the period over which plan variables operate. Each compensation structure in SIM also has its own calendar.

In addition to defining calendars, you also must create calendar frequency definitions. Calendar IDs and calendar Frequency IDs are the two elements used to define your organization’s specific calendar frequencies.

See Also

[“PeopleSoft Enterprise Sales Incentive Management Preface,” page xxix](#)

[Chapter 15, “Defining Plan Templates,” page 319](#)

[Chapter 3, “Defining Sales Incentive Management General Options,” Defining Calendars, page 55](#)

Pages Used to Set Up Calendars

Page Name	Object Name	Navigation	Usage
Detail Calendar	DETAIL_CALEDAR1	Compensation, Sales Incentives, Define Sales Incentive Options, Calendars, Detail Calendar	Define detail accounting calendars that match or differ from your general ledger calendars.
Frequency Definition	PF_FREQUENCY_DEFN	Compensation, Sales Incentives, Define Sales Incentive Options, Frequency Definition, Frequency Definition	Define calendar frequency IDs as a prerequisite for defining calendar frequencies.
Frequency Details	PF_FREQUENCY_DTL	Compensation, Sales Incentives, Define Sales Incentive Options, Frequency Details, Frequency Details	Define processing calendar frequency for a specific calendar ID.

Setting Up Calendars

Access the Detail Calendar page.

Detail Calendar

SetID: MODEL Calendar: 00

*Description: HT Template Calendar (SIM)

*Periods Per FY: 12

Descr: This calendar is for Sales Incentive Management, HT&I template.

End Date Default

☒ Month
☐ BiMonth
☐ Quarter
☐ Semi-Annual
☐ Year
☐ Days

Detail Periods
Customize | Find | View All |
First 1-12 of 12 Last

*Year	*Period	*Begin Date	*End Date	*Period Name	*Abbreviation		
2006	1	01/01/2006	01/31/2006	January 2006	Jan	+	-
2006	2	02/01/2006	02/28/2006	February 2006	Feb	+	-
2006	3	03/01/2006	03/31/2006	March 2006	Mar	+	-
2006	4	04/01/2006	04/30/2006	April 2006	Apr	+	-
2006	5	05/01/2006	05/31/2006	May 2006	May	+	-
2006	6	06/01/2006	06/30/2006	June 2006	Jun	+	-
2006	7	07/01/2006	07/31/2006	July 2006	Jul	+	-
2006	8	08/01/2006	08/31/2006	August 2006	Aug	+	-
2006	9	09/01/2006	09/30/2006	September 2006	Sep	+	-
2006	10	10/01/2006	10/31/2006	October 2006	Oct	+	-
2006	11	11/01/2006	11/30/2006	November 2006	Nov	+	-
2006	12	12/01/2006	12/31/2006	December 2006	Dec	+	-

Detail Calendar page (1 of 2)

Adjustment Periods
Customize | Find | View All |
First 1 of 1 Last

Adjustment Period	Period Name	Abbreviation		
998			+	-

Detail Calendar page (2 of 2)

Use this page to define your calendar periods, including begin and end dates. You should define your calendar period as the lowest (smallest) time period needed for your processing. For example, if you have monthly commissions with quarterly and annual bonuses, you only need to define one calendar with monthly periods. You will use Calendar Frequencies to define the monthly, quarterly, and annual processing periods that relate to the monthly calendar.

Periods per FY (periods per fiscal year)

Displays the appropriate number of periods for the calendar. For example, 4 indicates a quarterly calendar.

End Date Default

This setting tells the system which periodic intervals to create. Values are: month, bimonth, quarter, semi-annual, year, and days.

If you select days, enter the number of days to include in the calendar.

The system uses the end date default setting to populate the subsequent begin and end date values in the grid at the bottom of the page.

Detail Periods	Enter the detail periods for the calendar including the begin and end date, period name, and abbreviation.
Adjustment Periods	Enter any adjustment periods defined for the calendar including the period name and abbreviation.

When you enter period dates, you can define monthly calendar periods or any fiscal period that matches your accounting calendar (weekly, bimonthly) as long as the beginning and ending dates of successive periods don't overlap. Every day of the year must be included in a period; you may not leave gaps between period dates. Make sure that your detail calendar includes a period for the oldest transaction that you want to enter. After installing your PeopleSoft system, you may want to make this earliest date more restrictive.

As time passes, you will need to return to this page to enter ensuing years manually. You can enter several years at a time or treat the task as end-of-year system maintenance.

Note. The MODEL calendar delivered with your system contains data from 1957 to 2025. You may want to use the MODEL calendar rather than entering your own data from scratch; if so, make a copy of MODEL first and make changes to the copy.

See Also

Chapter 3, "Defining Sales Incentive Management General Options," Defining Calendars, page 55

Setting Up Calendar Frequency Definitions

Access the Frequency Definition page.

Frequency Definition

Frequency Definition

Customize | Find |

First 1-16 of 16 Last

Frequency ID	*Description		
1	Monthly	+	-
2	Quarterly	+	-
3	Annual	+	-
4	Weekly	+	-
5	Annual(January)	+	-
6	Annual(February)	+	-
7	Annual(March)	+	-
8	Annual(April)	+	-
9	Annual(May)	+	-
10	Annual(June)	+	-
11	Annual(July)	+	-
12	Annual(August)	+	-
13	Annual(September)	+	-
14	Annual(October)	+	-
15	Annual(November)	+	-
16	Annual(December)	+	-

Frequency Definition page

Sales Incentive Management delivers this page with common frequency definitions: weekly, monthly, quarterly, and annual. If you need additional frequencies, use this page to add them.

See Also

Chapter 3, “Defining Sales Incentive Management General Options,” Setting Up Calendar Frequencies, page 59

Setting Up Calendar Frequencies

Access the Frequency Details page.

Frequency Details

SetID: SHARE Frequency: Quarterly

Frequency Detail First ◀ 1 of 1 ▶ Last

*Effective Date: 01/01/1990 ⓘ *Status: Active ▾

*Description: Quarterly

Calendar Find | View All First ◀ 1 of 3 ▶ Last

*Calendar ID: HT Template Calendar (SIM) ▾

Calendar Detail First ◀ 1-12 of 12 ▶ Last

Accounting Period	Process
1	<input type="checkbox"/>
2	<input type="checkbox"/>
3	<input checked="" type="checkbox"/>
4	<input type="checkbox"/>
5	<input type="checkbox"/>
6	<input checked="" type="checkbox"/>
7	<input type="checkbox"/>
8	<input type="checkbox"/>
9	<input checked="" type="checkbox"/>
10	<input type="checkbox"/>
11	<input type="checkbox"/>
12	<input checked="" type="checkbox"/>

Frequency Details page

Once you have defined calendars for SIM, you can define calendar frequencies that are based on your calendar. Calendar frequencies expand calendar functionality—by creating multiple frequencies from one calendar ID, you can reuse existing calendars. For example, you can define monthly, quarterly, and annual frequencies that are all tied to one monthly calendar. Also, to enable greater flexibility for defining schedules for variables, a different frequency may be assigned to a variable than defined for the template, as long as the frequency is available in the template calendar. In this example, a quarterly frequency might be assigned to a template, but the template variables might use a monthly frequency.

The frequencies available in the list of valid values represent those entered on the Frequency Definition page.

Enter an effective date, status, and description.

Calendar ID

Select a calendar. The calendar ID you select represents the calendar you'll associate to the frequency. You may have more than one frequency defined for a single calendar. The system updates to display calendar detail.

You may also determine all frequencies associated with any other frequency definition for this frequency group. You may define frequency relationships across multiple calendars.

Process

Select for any of the accounting periods you want to process.

See Also

[Chapter 3, “Defining Sales Incentive Management General Options,” Setting Up Calendar Frequencies, page 59](#)

Reviewing Delivered Country Codes

To review delivered country codes, use the Country Code (COUNTRY_TABLE) component.

This section provides an overview of country codes and discusses how to:

- Describe countries.
- Format addresses.
- Validate addresses.

Understanding Country Codes

In PeopleSoft applications, country code information identifies countries in which your organization may do business. Country code information is required for handling currency conversion; each currency defined in the system is associated with its country of origin.

In SIM, transactions are processed in the base currency of the business unit.

See Also

[Chapter 3, “Defining Sales Incentive Management General Options,” Setting Up Currency Codes, page 54](#)

Pages Used to Review Country Codes

Page Name	Object Name	Navigation	Usage
Country Description	COUNTRY_DEFN	Compensation, Sales Incentives, Define Sales Incentive Options, Country Codes, Country Description	Update countries to be used throughout the system. Used mainly for currencies and addresses.
Address Format	ADDR_FORMAT_TABLE	Compensation, Sales Incentives, Define Sales Incentive Options, Country Codes, Address Format	Customize fields and field descriptions, so addresses conform to the customary address format of the specified country. Once set, the format appears everywhere the system uses the address subrecord.
Valid Address	EO_ADDR_VALIDAT	Compensation, Sales Incentives, Define Sales Incentive Options, Country Codes, Valid Address	Add valid combinations of address fields.

Reviewing Country Codes

Access the Country Description page.

Country Description page

Sales Incentive Management delivers this page with predefined country codes. In most cases, you do not have to add any information to this page.

2-Char Country Code Enter the Value Added Tax (VAT) registration ID for the country.
(two-character country code)

EU Member State Select if the country is a member of the European Union. Select to include the
(European union member country in prompts for intrastate reporting.
state)

Formatting Addresses

Access the Address Format page.

Field Name	Edit Label Override	Used in Search?	Include in Display?	Include in Print?	Line Number	Position Number	Use Description?	Pre Separator	Post Separator
1 COUNTRY		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		
2 ADDRESS1		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	1	<input type="checkbox"/>		
3 ADDRESS2		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	1	<input type="checkbox"/>		
4 ADDRESS3		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	1	<input type="checkbox"/>		
5 ADDRESS4		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	1	<input type="checkbox"/>		
6 CITY		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	1	<input type="checkbox"/>		
7 STATE	Province	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	2	<input type="checkbox"/>		
8 POSTAL		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	3	<input type="checkbox"/>		

Address Format page

Use this page to set up three aspects of the address: editing, displaying, and printing.

Address Edit Page Displays the secondary page used for editing the address. You can create a new secondary page using PeopleTools Application Designer. On the new address

secondary page you create, use page fields from the DERIVED_ADDRESS record definition. You then need to add a secondary page control to ADDRESS_SBP pointing to your new secondary page. Once you complete these steps, the secondary page is accessible in this field.

Enable Address Search	Select to enable users to search for a valid value. Selecting this check box enables the Used in Search column and the Valid Address page.
Enable Address Validation	Available only when Enable Address Search is selected. Select to ensure validation of all values selected. When selected, users must select a value from the search list. If this check box is cleared, users can select from the search list or enter a new value.
Field Name	Displays the field options available for the address page.
Edit Label Override	<p>(Optional) Enter an alternative label for the field. The new label is used when prompting for the field. You can customize address formats so that they conform to the address requirements of each location. For instance, for a U.S. address, you would change the Postal field to read <i>ZIP Code</i>. Keep in mind the distinctions between county and state:</p> <ul style="list-style-type: none"> • <i>County</i>: The tertiary geopolitical region within a state; the level after country and state. (In the UK, the level of state is called a county; you would enter such counties in the State field.) • <i>State</i>: The secondary geopolitical region within a country; a state in the U.S., a province in Canada, a county in the UK, and a department in France.
Used in Search	Available only when you select the Enable Address Search check box. Select the fields you want users to be able to search on.
Include in Display	Select to activate the corresponding address field as part of the standard address format for the selected country. To remove a field, clear the check box. When entering addresses, users enter a country code, and then the system updates the page to display the fields appropriate for that country.
Include in Print	Select to print the field when printing reports.
Line Number and Position Number	Enter the physical location of the fields for displaying and printing.
Use Description	Select to display the description for the field value. For example, for addresses in Japan, select this option to display the description of the state rather than the state code, since the code is numeric.
Pre Separator and Post Separator	Enter characters to be used surrounding the address field. For example, in the United States, a comma generally follows the city name, such as in San Francisco, CA. In India, there are parentheses around the postal code, for example (123).

Validating Addresses

Access the Valid Address page.

Valid Address page

To enable this page, select the Enable Address Search check box on the Address Format page, which enables the Used in Search column. The fields you selected to be used in search appear on the Valid Address page as columns. Enter the valid address combinations that the user can search for and select.

Reviewing Delivered UOMs

To review delivered UOMs, use the Unit of Measure (UNITS_TBL1) component.

This section provides an overview of UOMs and discusses how to review them.

Understanding UOMs

In PeopleSoft applications, UOMs determine how resources are quantified. Each resource must be associated with a standard UOM. Standardization helps to control the units used in transactions and reports.

In SIM, UOM is one of the variable properties that you define when creating incentive plan variables.

See Also

[Chapter 15, “Defining Plan Templates,” Defining Variables, page 326](#)

Page Used to Review UOMs

Page Name	Object Name	Navigation	Usage
Unit of Measure	UNITS_TBL1	Compensation, Sales Incentives, Define Sales Incentive Options, Unit of Measure, Unit of Measure	Display and modify UOMs, to determine how resources are quantified.

Reviewing UOMs

Access the Unit of Measure page.

Unit of Measure

Unit of Measure DAY

*Description Days

Short Description Days

*Convert To	*Conversion Rate	Inverse Conversion Rate
Days	1.00000000	1.00000000

Unit of Measure page

This page for adding UOMs.

Enter a description and short description for the unit of measure as applicable.

Convert To, Conversion Rate, and Inverse Conversion Rate Not used by Sales Incentive Management.

Setting Up the Payment System Interface

To set up the payment system interface, use the Payment System (EI_PAY_SYS_SETUP), Payment Codes (EI_PAYMENT_CD), and Map Payment Codes (EI_PYCD_MAP) components. Use the EI_PAY_SYS_SETUP_CI, EI_PAYMENT_CD_CI, and EI_PAYMENT_CD_CI component interfaces to load data into the tables for these components.

This section provides overviews of payment codes and discusses how to:

- Configure the payment system interface.
- Set up payment codes.
- Map payment codes.

See Also

Chapter 18, “Processing Incentive Transactions,” Managing Payment Processing, page 409

Understanding Payment Codes

In SIM, payment codes are mapped to external system earnings codes or GL account codes; these codes are used by an external payroll system when it receives results from the SIM ledger. The SIM payout service uses payment codes to consolidate payouts when posting to the SIM ledger. For integration with PeopleSoft Enterprise Payroll for North America, the payout codes are mapped to earnings codes.

If you use an external payout interface, you specify a payout system code that corresponds to the code in your external payroll system. You can map multiple SIM payment codes to a single external earnings code.

The amount of detail required in your commission statements determines the number of payment codes you should define. You must create a payment code for each separate balance that you need to track in your ledger; for example, you should define payment codes for commissions, bonuses, caps, and so on. You must also define separate payment codes for each type of UOM required, such as non-monetary payments.

Page Used to Set Up Payment Codes

Page Name	Object Name	Navigation	Usage
Define Payment System	EI_PAY_SYS_SETUP	Compensation, Sales Incentives, Define Sales Incentive Options, Payment System, Define Payment System	Set up and identify to which target database or system node SIM should publish payment messages.
Payment Codes	EI_PAYMENT_CD	Compensation, Sales Incentives, Define Sales Incentive Options, Payment Codes, Payment Codes	Define payment codes for the SIM system, which includes specifying payment type.
Map Payment Codes	EI_PYCD_MAP_SETUP	Compensation, Sales Incentives, Define Sales Incentive Options, Map Payment Codes, Map Payment Codes	Map SIM payment codes to external earnings codes.

Configuring the Payment System Interface

Access the Define Payment System page.

Define Payment System

Payment System NAPY

Payment System Attributes Find | View All First 1 of 1 Last

Effective Date 01/01/1900 **Status** Active

***Description** North American Payroll

Default Node PSFT_HR

Message Name PAYMENT_EIM_REQUEST

Message Version VERSION_1

Payment Code Record EARNINGS_CD_VW

Define Payment System page

Note. The data for the NAPY payment system is delivered data for integration with PeopleSoft Enterprise Payroll for North America.

Default Node

Enter the node to which payment request messages should be published.

Message Name	Enter the message definition (a PeopleTools object) that contains payment request data.
Message Version	Enter the attributes of the message object.
Payment Code Record	Enter a table to use for target payment codes. Target payment system codes are stored in the table view. This is also the lookup table for payment code mapping. PeopleSoft delivers the <i>Earnings_CD</i> table field value for PeopleSoft Enterprise Payroll for North America.

Setting Up Payment Codes

Access the Payment Codes page.

Payment Codes page

System Data and Currency	If this payment code is a currency, select the Currency check box. Otherwise, select a unit of measure.
Payout Type	Select a payout type. Valid values are: <i>Cap</i> , <i>Draw</i> , and <i>Payout</i> . If the payout type is <i>Draw</i> , enter the recovery payment codes to associate with the draws to recover.

These delivered payment codes are used by all market templates:

Payment Code	Type	Description	Comments
BONUS	Payout	Bonus	Used in template payout formulas for paying quarterly and annual bonuses.

Payment Code	Type	Description	Comments
CAP1	Cap	Product Commission Cap	Not used in the templates. An example of how to define a cap. Defining a CAP with a payment code enables you to track it in the ledger. You could alternatively define a cap as a constant.
CAP2	Cap	Business Unit Cap - GBIBU	Not used in the templates. An example of how to define a cap.
CLUB	Payout	Club	Used in the template to pay the sales representative when he or she earns the right to attend a sales club.
COM	Payout	Commission	Not used in the template.
COM1	Payout	Commission - products	Used in the template to pay commission on sales of products.
COM2	Payout	Commission - services	Used in the template to pay commission on sales of services.
DRAW	Draw	Draw	Used in the Draw component.

Mapping Payment Codes

Access the Map Payment Codes page.

Map Payment Codes

Business Unit GBIBU

Target System Payment Codes Customize Find 1-2 of 2 First Last

	Payment Code	Description	Payment System	Pay System Description	Payout System Code		
1	BONUS	Bonus	NAPY	North American Payroll	B32	+	-
2	COM	Commission	NAPY	North American Payroll	CMS	+	-

Map Payment Codes page

Payment Code	The payment code represents the Sales Incentive Management payment code, which is a key to the payment code table.
Payment System	Select a payment system. You define these values on the Define Payment System page. The payment system accepts payment requests and processes payments. It also issues checks and sends confirmation messages to SIM.
Payout System Code	Select the payment code of the target system that maps to the corresponding payment code of the Sales Incentive Management system. If you are publishing payout messages to PeopleSoft Enterprise Payroll for North America and have selected this as your payment system on this page, the system prompts you to select payment code values from the table defined as Payment Code record on the Define Payment System page. If you are mapping payment codes to an external system, you must first define a paycode table for the external system in PeopleTools Application Designer, then populate that table with the values from your external system, then select one of the payment codes from that table as the target.

Defining SIM User Roles

In PeopleSoft applications, roles help secure your system by restricting access to sensitive data. Role-based security enables users with certain assigned roles to access specific rows of data that are controlled by key fields. For example, you can add salespeople in a certain division to a role, and then use role security to enforce the appropriate limits on their system access.

Defining Performance Categories

To define performance categories, use the Performance Categories (EI_EI_PRF_CATEGORY) component. This section provides an overview of performance categories and discusses how to set them up.

Understanding Performance Categories

SIM uses performance categories to conveniently group similar performance measures. You can associate individual performance measures that are similar in purpose with a performance category, and then associate the performance category with a department or business unit to help determine performance-related incentive payment for participants in that department or business unit. For example, a performance category named “REVENUE” might be defined to group different types of revenue, such as product revenue, service revenue, and so on.

Page Used to Set Up Performance Categories

Page Name	Object Name	Navigation	Usage
Performance Categories	EI_PERF_CATEGORY	Compensation, Sales Incentives, Define Sales Incentive Options, Performance Categories, Performance Categories	Define performance categories.

Setting Up Performance Categories

Access the Performance Categories page.

Define categories to group performance measures. You can narrow the availability of a performance category to a specific product category, or to a specific product category and a corresponding market template. If you leave these fields blank, the performance category is a SIM global performance category, available to all installed vertical applications and market templates.

The system automatically selects the System Data check box if the performance category is delivered by PeopleSoft.

See Also

Chapter 3, “Defining Sales Incentive Management General Options,” Defining Performance Categories, page 69

Defining Performance Measures

To define performance measures, use the Performance Measures (EI_EI_PERF_MEASURE) component. Use the EI_EI_PERF_MEASURE_CI component interface to load data into the tables for this component.

This section provides an overview of performance measures, lists prerequisites, and discusses how to set up performance measures to fit your business needs.

Understanding Performance Measures

Performance measures are at the center of sales compensation, as they specify the results or events by which sales performance is measured. Performance measures can be applied at the corporate, business unit, division, group, team, or individual level (or some combination of these).

The SIM system uses performance measures to:

- Classify transactions (such as calculation output and payments) as belonging to a certain performance to be rewarded.
- Explicitly relate variables, such as quotas and attainments, together.

A typical incentive plan usually contains three or four performance measures, but more can be defined if required. The incentive plan rules reference the performance measures. Performance measures are indirectly associated with compensation structure nodes so that the measure is available to plan participants on that node and any child nodes; the measure is referenced within the incentive plan. (Performance measures are directly associated with variables. Variables can be included in a configuration plan, and it is these plans that can be directly associated with a compensation node.) Performance measures directly group quotas and attainment variables across multiple calendar frequencies; this means that during reporting, participants can see how each quota directly relates to its attainment.

During transaction processing, plan rules can update the progress (attainment or performance) of a performance measure for current and historical measurement periods. The plan rules do this by updating a variable, usually an attainment variable. For commission-based measures, this is similar to crediting.

Individual performance measures can be grouped into a performance category; using performance categories facilitates associating performance measures with departments and territories.

Prerequisites

Prior to defining performance measures, you must define performance categories.

See Also

[Chapter 3, “Defining Sales Incentive Management General Options,” Defining Performance Categories, page 69](#)

Page Used to Set Up Performance Measures

Page Name	Object Name	Navigation	Usage
Performance Measures	EI_PERF_MEASURE	Compensation, Sales Incentives, Define Sales Incentive Options, Performance Measures, Performance Measures	Define performance measures.

Setting Up Performance Measures

Access the Performance Measures page.

Performance Measures

SetID SHARE **Performance Measure** PROD_REV

Performance Measure Details Find | View All First 1 of 1 Last

Effective Date 01/01/1900 **Status** Active

***Description** Product Revenue

Short Description Prod Rev

Performance Category REVENUE

Product Category Sales Incentive Management

Market Template

☒ **Transaction Level**

☒ **System Data**

Performance Measures page

Performance Category

(Optional) Enter a category with which to group this performance measure.



Click to access valid performance categories using Query Builder.

Transaction Level

If this check box is selected, this performance measure is displayed on the Compensation Snapshot page (one of the participant user interfaces) for a participant. Select this check box for any performance measure that is based on transactions. For example, a Product Revenue performance measure might be based on order transactions, while a Customer Service performance measure might not be based on transactions.

Performance measures are the basis of the results that are displayed on the Compensation Snapshot page. The page groups variables (quotas and attainments) by performance measure. All performance measures display on that page.

Performance measures with this check box selected also display the associated transactions that tie to the performance measure. If this check box is cleared for a performance measure, the transaction details sections are hidden. However, for a participant to see the Compensation Snapshot page (or any of the participant user interfaces), the compensation administrator must have associated a defined user interaction object (UIO) with the participant on the participant compensation structure.

System Data

The system automatically selects this check box if the performance measurement is delivered by PeopleSoft.

See Also

[Chapter 3, “Defining Sales Incentive Management General Options,” Defining Performance Categories, page 69](#)

[Chapter 14, “Understanding Plans and Plan Templates,” Variables, page 312](#)

[Chapter 15, “Defining Plan Templates,” Defining Variables, page 326](#)

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Defining Compensation Rollup Layers

To define compensation rollup layers, use the Compensation Rollup Layer (EI_EI_LAYER) component.

This section provides an overview of compensation rollup layers and discusses how to set them up.

Understanding Rollup Layers

A SIM compensation structure usually has multiple levels. During transaction processing, the system may have to roll up transactions to compensate all participants who should be credited for a transaction. Frequently, rollups must be applied to a participant on a node that is not just one, but several levels higher in a compensation structure. For example, in the SIM system, a transaction allocated to a salesperson on a territory compensation node might roll up to a sales manager situated at the enterprise node level, several levels above the territory where the transaction is originally allocated.

To facilitate rollups, SIM uses *layers*. Each node on a compensation structure can be associated with a layer. For example you can define a REGION layer and associate it with one or more compensation nodes. During transaction processing, the incentive plan Rollup formula uses the layer to find the appropriate node in the compensation structure. In this example, the Rollup would look for the compensation node designated as REGION. Incentive plan rules can also reference levels associated in other, linked compensation structures, as well as the structure with which the plan is associated.

Rollups occur using a combination of role and layer, which allows a transaction to be rolled up to a specific role on a layer; for example, to the role VP on the REGION layer.

You can alternatively perform rollups using *levels* instead of layers. Level is a numeric value. In this case, the Rollup formula uses the level number to determine how many “hops” to make to reach the appropriate compensation node above the current node.

Page Used to Set Up Compensation Rollup Layers

Page Name	Object Name	Navigation	Usage
Compensation Rollup Layers	EI_LAYER	Compensation, Sales Incentives, Define Sales Incentive Options, Compensation Rollup Layers, Compensation Rollup Layers	Define layers for compensation structures.

Setting Up Compensation Rollup Layers

Access the Compensation Rollup Layers page.

Enter descriptive information for a specified rollup layer. If the System Data check box is selected, this indicates that the rollup layer is a delivered PeopleSoft value.

See Also

Chapter 13, “Working with Compensation Structures,” page 289

Defining SIM Table Structures

This section discusses how to define both Lookup table and Commission table structures for use in Sales Incentive Management.

Defining Lookup Table Structures

This functionality enables you to configure the delivered Lookup formula to reference a uniquely defined rate during plan processing.

See Chapter 11, “Managing Formulas,” Creating Lookup Tables, page 248.

Defining Commission Table Structures

Use the Lookup Table Definition page to configure the delivered Commission Rate formula to reference a specific or interpolated rate during plan processing.

See Chapter 11, “Managing Formulas,” Creating Commission Rate Tables, page 254.

Reviewing Delivered EIP Job Definitions

To review delivered EIP job definitions, use the EIP Job Definition (EI_EIPJOBDFN) component.

This section provides an overview of PeopleSoft Enterprise Integration Points (EIP) job definitions and discusses how to review delivered job definitions.

Understanding EIP Job Definitions

The SIM system can receive and process CRM forecasted opportunities, using a pre-configured EIP. CRM forecasted opportunities correspond to SIM projected transactions, which are distinct from normal SIM transactions—as forecasted opportunities do not realize revenue, they require special treatment within SIM.

An EIP job definition associates an application message, that contains the data being exchanged between the CRM and SIM systems, with a SIM Process Control Monitor job. Each EIP job definition is associated with a SIM job and a SIM rollback definition. When the system receives an application message containing CRM forecasted opportunities, it creates a processing batch from the message contents and immediately schedules a SIM job to process the batch. In addition, the system leverages the existing SIM APIs (application program interfaces) and processes to perform data validation and error checking while processing forecasted opportunities. The system performs EIP job definition processing in real time, and participants can view their posted forecasted opportunity results using the SIM participant user interfaces.

Note. Each time the system processes forecasted opportunities for a participant, the new results replace any previously processed forecasted opportunities for that participant.

Page Used to Review Delivered EIP Job Definitions

Page Name	Object Name	Navigation	Usage
EIP Job Definitions	EI_EIPJOBDFN	Compensation, Sales Incentives, Define Sales Incentive Options, EIP Job Definition, EIP Job Definition	Configure a PeopleSoft EIP to automatically transfer and process CRM forecasted opportunity data into SIM.

Reviewing Delivered EIP Job Definitions

Access the EIP Job Definitions page.

EIP Job Definitions page

Sales Incentive Management delivers pre-configured values for EIP job definitions.

Job ID

Select the job to be executed by the EIP processing class. You create jobs in the Define Jobs component.

The selected Job ID determines the available values for the Application Class ID and Root Package ID fields.

Application Class ID	Select the ID of the EIP processing class.
Root Package ID	Select the root package ID of the EIP processing class.
Qualified Package/Class Path	Select the ID of the EIP processing class.

CHAPTER 4

Registering Base and Derived Classes

This chapter provides an overview of metadata, list prerequisites and common elements, and discusses how to:

- Define base class object information.
- Define derived class object information.

Understanding Sales Incentive Management Metadata

Metadata is the heart of Sales Incentive Management—particularly metadata specific to sales incentives. To understand how to configure and use metadata objects in Sales Incentive Management, this section discusses:

- Sales Incentive Management metadata object model.
- Sales Incentive Management object classes.
- Sales Incentive Management objects library.

Sales Incentive Management Metadata Object Model

The Sales Incentive Management metadata object model is divided into three layers—PeopleTools metadata at the bottom, and Sales Incentive Management metadata at the top. As several levels of metadata already exist in PeopleTools, Sales Incentive Management augments the existing functionality by “wrapping” the PeopleTools in a consistent API, and extending them with the object-level layers required by Sales Incentive Management.

- PeopleTools-level metadata provides information about fields, field labels, and database records and views.

This level of metadata is universally supported throughout PeopleTools infrastructure. However, the limitations of this metadata include the inability to model relationships between objects and the necessity to keep a tight correlation of record metadata to physical database tables.

- Sales Incentive Management adds a final layer of metadata that richly describes relationships between objects (at the object level, as opposed to the table level), and also describes object services.

Developing new object types can extend the Sales Incentive Management metadata, providing a comprehensive metadata layer for building robust vertical applications on the platform while leveraging the prebuilt behavior. As all Sales Incentive Management components, engines, and queries are metadata-aware, new objects act as PeopleSoft-delivered objects.

The Sales Incentive Management metadata application program interface (API) facilitates the movement of metadata information throughout the Sales Incentive Management system. It enables the Sales Incentive Management metadata to extend and work with the existing PeopleTools. Sales Incentive Management metadata contains the PeopleTools persistence of Sales Incentive Management classes, which describes the persistence at the database level. As the system is driven by metadata, other system components use the Sales Incentive Management metadata API to navigate to the PeopleTools persistence, and where necessary, to the database persistence. The Sales Incentive Management metadata API also:

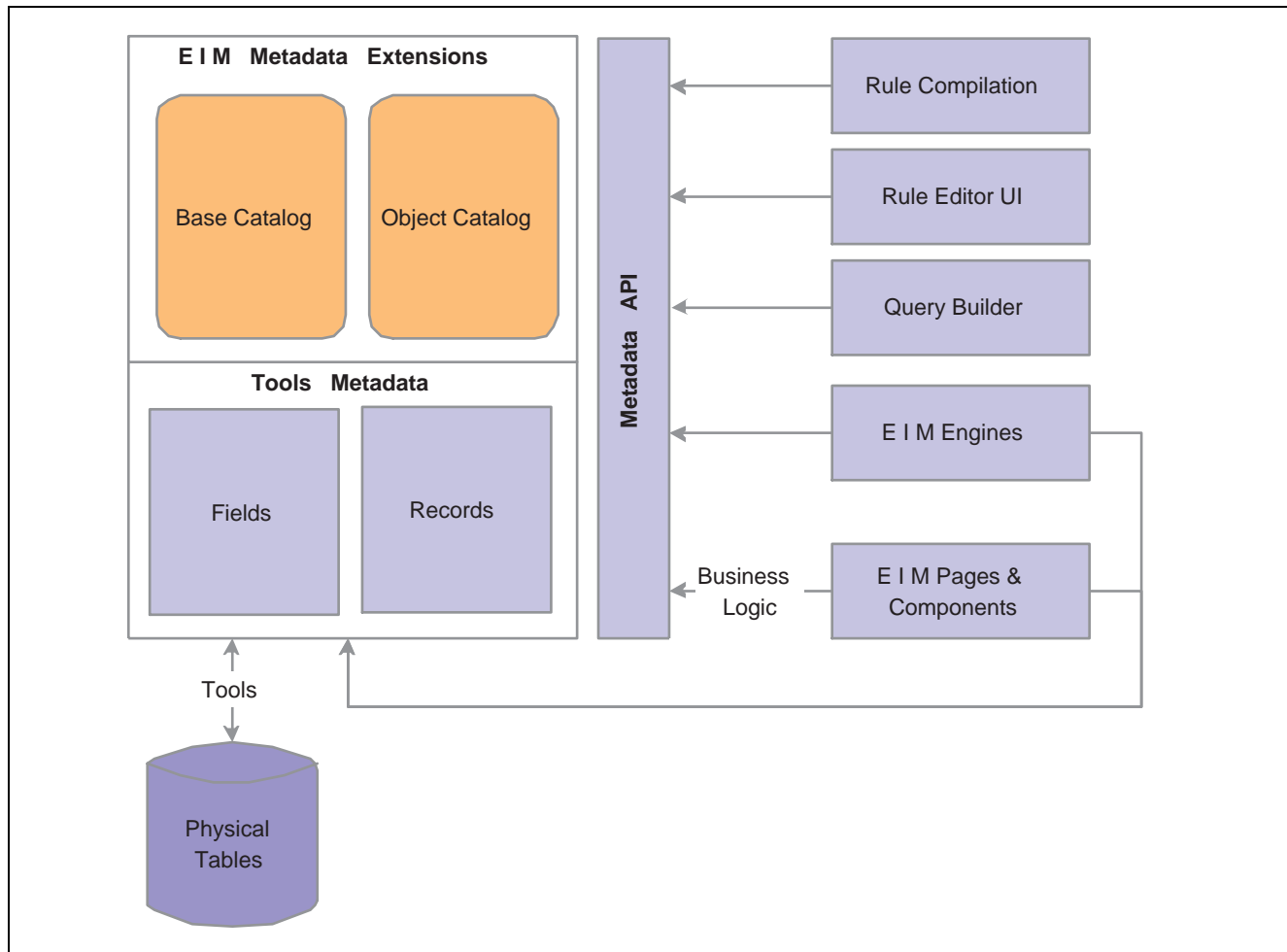
- Leverages the functionality of existing PeopleTools metadata.

Once you have defined Sales Incentive Management metadata, the Sales Incentive Management metadata API automatically “pulls in” the predefined PeopleTools, using APIs to these components.

- Provides the system with a single view of the application object model and enables all system components to query the metadata for specific objects, or objects that meet specific criteria.

The Sales Incentive Management metadata API operates through various user interfaces, such as the Base Catalog and Object Catalog pages (also the Formula Catalog, Query Builder, and User Interactive Object interfaces (UIOs).

The following diagram depicts the various levels of metadata and how different levels of components interact with the metadata:



Viewing metadata layers

Sales Incentive Management Object Classes

Sales Incentive Management metadata objects are registered in metadata as classes. Classes are grouped together according to general behavior, processing, and attribute needs. The two types of Sales Incentive Management object classes are:

- **Base Class:** A base class defines the general behavior and attributes for a class, collects objects for better processing and querying, and provides a single level of inheritance for the derived classes that extend the base class.

Delivered Base Class objects *should not* be modified, beyond editing the object's descriptive label.

- **Derived Class:** A derived class is a “child” of its “parent” base class.

They inherit all the attributes of the parent base class, and are also defined with unique attributes necessary for the particular derived class. Derived class objects can also be extended with attributes and by relationships to other objects.

As an example, the metadata catalog includes the *Participant* Base Class object and its child, the *Sales Person* Derived Class object. Sales Incentive Management uses the generic participant object to define any individual who receives incentive payments. All attributes common to all participants are stored in the *Participant* Base Class object. The Derived Class object *Sales Person* is a further refinement of the participant definition—it includes all attributes of its parent object (*Participant*), plus those specific attributes required by a sales person.

Using base and derived classes enables the construction of flexible incentive compensation structures. As discussed, Sales Incentive Management base classes and derived classes are implemented in a parent/child relationship. To facilitate this relationship in PeopleTools, a single table—Object Descriptor (EI_SY_META_TBL)—holds the base class attributes, and each derived class is a child record of the base class table. The derived class table—Derived Object Descriptor (EI_SY_OBJS_TBL)—only includes rows for the derived class and its unique attributes. Storing common base classes in a single table enables a more object-oriented processing method. When necessary to access a derived class, the system performs a join to resolve the complete object.

Sales Incentive Management Objects Library

Sales Incentive Management delivers a library of predefined Sales Incentive Management metadata class objects. You can extend the delivered class objects by modifying existing classes or creating new custom classes and registering these classes in metadata. Delivered class objects have a version number of 1.

The library includes the following types of metadata objects:

- **Compensation Structure Objects** enable you to define the operational parameters in which your vertical applications will operate, such as your organization's corporate goals and policies, compensation hierarchies, plan definitions, and other reference data.

For incentive compensation plans in the sales industry, this is generally territory tree objects or organizational structure objects.

- **Reference Objects** are used to further define your organization's compensation structure, by modeling the objects used to conduct.

Some examples of reference objects are: Geography, Industry, Products, and Customers. You can import your existing structures into the Incentive Management (IM) reference object structure and leverage the definitions in your incentive processes.

- **Participant Objects** are used to assign compensation plan parameters to individuals or groups.
- **Incentive Objects** are used to define and support the EIM calculation process and results, such as incentive plan and market template objects, plug-in formula objects, and UIOs (for reporting).
- **Relationship Objects** enable you to create relationships between objects and related attribute objects.

These associations define how the EIM Engine resolves transactions to pay incentives to participants.

Prerequisites

You must have defined your organization's business requirements for base and derived class objects.

See Also

[Chapter 1, "Getting Started with Sales Incentive Management," page 1](#)

Common Elements for This Section

Class Name	Enter the name of the class.
Display Label	Enter a unique and descriptive label for this metadata object. This name displays for the object throughout the system.
Object Owner ID	Select <i>Enterprise Incentive Mgmt</i> (management) to identify the object to the system as an Sales Incentive Management object.
Foundation	The system automatically sets this field value to EIM to indicate that this object is part of the EIM foundation. You can use objects that are defined at this level within any product category and market template. To narrow the use of an object, specify the product category or market template to which the object belongs.
Product Category	Select a product category for the object to limit use of the formula to that specific product category. Currently the <i>Sales Incentive Management</i> product category is the only available option.
Market Template	If you select a product category, you can then select a market template within that product category to limit use of the object to that specific market template. Current market templates are <i>Banking & Capital Management</i> and <i>High-Tech & Industrial</i> , both of which are part of Sales Incentive Management.
Active Flag	Select to make this formula available for use in incentive plan rules and plan processing. By default the system selects this check box.
Version	Enter the version number of the object. This is information only. The system currently does not make use of this value.
Use in UI?	Select to display the object class in dynamic Sales Incentive Management user interfaces.
Use in Rules?	Select to display the object class in dynamic Sales Incentive Management rules interfaces.
Use in Queries?	Select to indicate this object class can be used in or searched against in a Query Builder query.
System Data	The system automatically selects this check box if the object is delivered by PeopleSoft.

HTML Help

Create online help for this object attribute, which is automatically formatted in HTML code. This online help displays on dynamic Sales Incentive Management user interfaces.

Defining Base Class Object Information

To define base class object information, use the Base Catalog (EI_BASE_CATALOG) component.

Sales Incentive Management comes delivered with a suite of predefined base class objects. Generally, you will not need to create any new or modify any existing base class objects.

This section discusses how to:

- Define base class object information.
- Specify object attribute details.
- Specify object relationship details.

Pages Used to Define Base Class Object Information

Page Name	Object Name	Navigation	Usage
Base Catalog	EI_SY_BASE_PG	Compensation, Sales Incentives, Define Sales Incentive Options, Base Catalog, Base Catalog	Define information for a Sales Incentive Management base object.
Object Attribute Subpage	EI_SY_OATT_SP	Click the View Attribute Details button in the Attributes region.	Define information for a Sales Incentive Management base or derived object attribute.
Object Relationship	EI_SY_OREL_SP	Click the Rel Details button in the Relationships region.	Define information for a Sales Incentive Management base or derived object relationship.

Defining Base Class Object Information

Access the Base Catalog page.

Base Catalog

Class ID COBJ **Last Upd User** VP1 **Last Upd DtTm** 03/18/2003 12:42:02PM

▼ **Basic Information**

*Description Compensation Object

*Class Name CompensationObject

Display Label Territory

*Object Owner ID Enterprise Incentive Mgmt

*Foundation EIM

Product Category

Market Template

*Active Flag Active

*Version 1

▼ **Object Use**

☒ Production
☐ Staging
☐ Reporting
☐ System
☐ Configuration

☒ Use in UI?
☒ Use in Rules?
☒ Use in Queries?
☒ System Data

▼ **Persistence**

*Tools Record Na EI_CO_BASE_TBL

Record Description EIM Comp Objects Base Table

▼ **Base Object Attributes**

☒ Class is Extendable

Base Catalog page (1 of 2)

▼ **Attributes**

Active	*Attribute Name	Field Name	Description		
<input checked="" type="checkbox"/>	BUSINESS_UNIT	BUSINESS_UNIT	Business Unit		
<input checked="" type="checkbox"/>	DESCR	DESCR	Territory Description		
<input checked="" type="checkbox"/>	EFF_STATUS	EFF_STATUS	Status as of Effective Date		
<input checked="" type="checkbox"/>	EFFDT	EFFDT	Effective Date		
<input checked="" type="checkbox"/>	EI_CLASSID	EI_CLASSID	Class ID		
<input checked="" type="checkbox"/>	EI_LAYER_ID	EI_LAYER_ID	Rollup Layer		
<input checked="" type="checkbox"/>	EIM_KEY	EIM_KEY	Territory		
<input checked="" type="checkbox"/>	EIM_PARENT_KEY	EIM_PARENT_KEY	EIM Key		
<input checked="" type="checkbox"/>	HIERARCHY_FLAG	HIERARCHY_FLAG	Hierarchy Flag		
<input checked="" type="checkbox"/>	LASTUPDDTTM	LASTUPDDTTM	Last Update Date/Time		
<input checked="" type="checkbox"/>	LASTUPDOPRID	LASTUPDOPRID	Last Update User ID		
<input checked="" type="checkbox"/>	LOAD_DTTM	LOAD_DTTM	Load Date and Time		
<input checked="" type="checkbox"/>	TREE_NAME	TREE_NAME	Compensation Structure		

Import Tools Fields

▼ **Relationships**

Active	*Relationship Name	*Relationship Type	*Relationship Target	Rel Details	Description	View Class		
<input checked="" type="checkbox"/>	Relationships	One-to-Many (Child)	AQBJ		Relationship Object			

▼ **Extended Attributes**

Type	Name	*Value		
Java Class	COBJ	com.peoplesoft.im.eim.comptree.CompTreeN		
Record	Prompt	EI_COBJ_DER_VW		

Base Catalog page (2 of 2)

Important! Except for editing an object's label (the Description field), you *should not* modify the Base Class objects delivered by PeopleSoft.

Object Use

Production	Select to identify the object as a general production object. Most objects are production objects.
Staging	If selected, the object is defined as a specialized staging object. It is only used to load data into the Sales Incentive Management system, and is not used throughout the system as a general object.
Reporting	Select to identify the object solely as a reporting object.
System	If selected, the object is used internally by the system for processing incentive calculations, and is generally not visible to users, such as compensation administrators.
Configuration	If selected, the object is a specialized object used for Sales Incentive Management system configuration.

Persistence

Tools Record	Specify an <i>EI Tools Record</i> to which this base object maps. The Tools Record is the sole data source and storage device for the class, and Tools-level metadata provides information to the object about fields, field labels, database records, and views. You can select fields included in the tools record as Attributes, or you can automatically import all fields using the Import Tools Fields button.
---------------------	--

Base Object Attributes

Class is Extendable	Select to indicate this base object class can be extended by derived object classes.
----------------------------	--

Attributes

In the list of Attributes for the object class, each attribute must have a corresponding field in the Tools Record. To facilitate this, we've provided the Import Tools Fields function to automatically and conveniently load all Tools fields from the selected Tools Record.

Note. It is important that the Attributes list and PeopleTools Field Name list are synchronized. If you modify any PeopleTools records, you should use the Import Tools Fields function to ensure the synchronicity between the Attributes list and updated Tools Record information.

Active	This option is selected by default when you add an attribute row. Clear the check box to indicate a specific attribute is not active.
Attribute Name	This field is automatically populated by the system when you import Tools fields, but can be modified.
Field Name	Select an attribute field—available attribute fields are dependent on the specified Tools Record table.
Description	This field is automatically populated by the system when you import Tools fields, but can be modified. This description name displays in the Sales Incentive Management system.
View Attribute Details	Click to set controls, options, and settings for a selected object attribute.

Import Tools Fields Click to import all fields of the selected Tools Record. This function does not overwrite any modifications you make to the Attribute Name or Description fields.

Relationships

In the Relationships region, you define the relationships between the base object and a target or “receiving” object, then use the Relationship Details page to further define exactly how the classes are related.

Active This option is selected by default when you add a relationship row. Clear the check box to indicate a specific relationship is not active.

Relationship Name Enter a descriptive name for the relationship.

Relationship Type Enables you to define a standard object relationship type and how the relationship will be modeled in the physical Sales Incentive Management tables. Select from *Many-to-Many*, *Many-to-One*, *One-to-Many*, *One-to-Many (Child)*, or *One-to-One*.

Relationship Target Specify the target or receiving object of the relationship.

Rel Details (relationship details) Click to set various options for a specific relationship.

View Class Click this button to launch a new window and view the Object Catalog page for the object class that you specify in the Relationship Target field.

Extended Attributes

Use this region to define additional information used in processing. Select the type of extended attribute for this particular object, and enter a name and value. For example, the base class for the Relationship Object *AOBJ* has the following extended attribute values to prompt the EIM Associated Derived Object View record: Type = *Record*, Name = *Prompt*, and Value = *EI_AOBJ_DER_VW*.

Available types of extended attributes are:

- *Application Class*
- *Component*
- *Component Interface*
- *Factory Class*
- *Flag*
- *Java Class*
- *Menu*
- *Page*
- *Query*
- *Record*
- *Service*
- *String*
- *Sub-Page*
- *Sub-Record*

- *Work Record*

Specifying Object Attribute Details

Access the Object Attribute Subpage page.

Object Attribute Subpage

Object Attribute

*Attribute Name: DESCR *Active Flag: Active

*Alias: DESCR

Description: Territory Description

Field Name: DESCR

Configuration Controls

☐ Allow Modifications?

☐ Allow Deletion?

Use Options

☒ Use in Queries?

☐ Use in UI?

☒ Use in Rules?

Key Settings

☐ Business key?

Extended Attributes

	*Type	Extension Name	*Extension Value
1	Application Class		

* Required Field

OK Cancel

Object Attribute Subpage page

Alias Enter an alias for this object attribute, which is used when you are defining rules for a plan definition.

Allow Modifications? If selected, the object attribute can be modified in dynamic user interfaces. For example, if you select this option for the object attribute, then the attribute becomes available for bulk editing on the Query Builder - Results page enabling you to perform bulk replace on all attribute values in the query search results.

See [Chapter 19, “Using Query Builder,” Editing Object Attribute Values in Bulk, page 436.](#)

Allow Deletion? If selected, the object attribute can be deleted in dynamic user interfaces.

Business key? Select to indicate the object attribute is a Business Key that participates in a key set—regardless of whether it is an actual key in the class’ Tools Record.

The Extended Attributes group box on this page has similar functionality to the Extended Attributes group box on the Base Catalog page.

See Also

[Chapter 4, “Registering Base and Derived Classes,” Defining Base Class Object Information, page 81](#)

Specifying Object Relationship Details

Access the Object Relationship page.

Object Relationship

*Relationship NameRelationships

*Active FlagActive

Description

Use Options

☒ Use in UI?

☒ Use in Queries?

☒ Use in Rules?

Standard Tools Relationships

One-to-Many (Child)Many-to-One

Non-UI Relationships

One-to-OneOne-to-ManyMany-to-Many

Source Cardinality

0..10..n1..11..n

Target Cardinality

0..10..n1..11..n

*Relationship Target

AOBJ

☒ Relationship is traversable?

☒ Relationship is Bidirectional?

☐ Bypass Indirection

Attributes

	*Attribute Name		*Target Attribute ID		
1	BUSINESS_UNIT		BUSINESS_UNIT	+	-
2	EFFDT		EFFDT	+	-
3	EIM_KEY		EIM_KEY	+	-
4	TREE_NAME		TREE_NAME	+	-

* Required Field

OKCancel

Object Relationship page

Note. Relationship settings, such as Standard Tools Relationships, Non-UI Relationships, Source Cardinality, or Target Cardinality, do not affect the actual behavior of the relationship—these settings are only for relationship definition purposes.

Standard Tools Relationships

Use this group box when the relationship is also registered in PeopleTools. As relationships registered in Tools must be a parent/child relationship, indicate if the source class is either *One-to-Many (Child)* or *Many-to-One (Parent)*.

Non-UI Relationships

Use this group box when the relationship is not already registered in PeopleTools. Indicate if the relationship is either *One-to-One*, *One-to-Many*, or *Many-to-Many*.

Source Cardinality	Specify the cardinality setting for the source class. Select either <i>O..1</i> , <i>0..n</i> , <i>1..1</i> , or <i>1..n</i> .
Target Cardinality	Specify the cardinality setting for the target class. Select either <i>O..1</i> , <i>0..n</i> , <i>1..1</i> , or <i>1..n</i> .
Relationship Target	Indicate the target or receiving object for this relationship. The Relationship Target you defined on the Base Catalog page displays here as a default value, but can be overwritten if you select a new target value and click Save.
Relationship is traversable?	Indicates that the relationship (defined on this page) can be used to connect to the Relationship Target class, by traversing or crossing over compensation structure nodes. This check box is automatically selected by default.
Relationship is Bidirectional	Indicates the relationship can move in both directions: from the object to the defined object target, and from the target to the object. This check box is automatically selected by default.
Bypass Indirection	If the relationship explicitly includes setID indirection fields, selecting this check box indicates that automatic setID indirection should not be used by the system when relating the two classes.
Attributes	Specify one or more Attribute Names and Target Attribute IDs for the Relationship Target. For example, the delivered base class object <i>COBJ</i> (Compensation Object) has a one to many relationship to the Relationship Target <i>AOBJ</i> (Association Object). These association objects are further defined to have the attributes of <i>BUSINESS_UNIT</i> (business unit) and <i>EFF_DT</i> (effective date). The result is that association objects related to the <i>COBJ</i> object include business unit and effective date data.

See [Chapter 4, “Registering Base and Derived Classes,” Specifying Object Attribute Details, page 85](#).

Defining Derived Class Object Information

To define derived class object information, use the Object Catalog (EI_OBJECT_CATALOG) component.

Sales Incentive Management comes delivered with a suite of predefined derived class objects. In implementing your Sales Incentive Management system, most modifications you perform are to the derived class objects, so the modified derived class objects match your organization’s compensation structure requirements.

Aside from PeopleTools persistence, metadata for a derived class object also contains an edit component and save component, both describing PeopleTools components. The edit component represents the user interface built for the maintenance of an object. The save component represents a component to be invoked to manage an object through means other than a dedicated user interface. In many cases, these two components are the same, but the system retains the flexibility to separate them. Following the theme of a single level of inheritance, if a dedicated component does not exist for a derived class, that class will use the component of the base class.

This section discusses how to define derived class object information.

See Also

[Chapter 4, “Registering Base and Derived Classes,” Defining Base Class Object Information, page 81](#)

Pages Used to Define Derived Class Object Information

Page Name	Object Name	Navigation	Usage
Object Catalog	EI_SY_OBJS_PG	Compensation, Sales Incentives, Define Sales Incentive Options, Object Catalog, Object Catalog	Define information for a Sales Incentive Management derived class object.
Object Attribute Subpage	EI_SY_OATT_SPG	Click the View Attributes Details button in the Attributes region.	Define information for a Sales Incentive Management base or derived object attribute. See Chapter 4, “Registering Base and Derived Classes,” Specifying Object Attribute Details, page 85 .
Object Relationship	EI_SY_OREL_SPG	Click the Rel Details button in the Relationships region.	Define information for a Sales Incentive Management base or derived object relationship. See Chapter 4, “Registering Base and Derived Classes,” Specifying Object Relationship Details, page 86 .

Defining Derived Class Object Information

Access the Object Catalog page.

Object Catalog

Class ID CHNL **Last Upd User** VP1 **Last Upd DtTm** 03/18/2003 2:41:39PM

▼ **Basic Information**

*Description Channel Reference Object *Foundation EIM

*Class Name Channel **Product Category** Sales Incentive Management

Display Label Channel **Market Template**

*Object Owner ID Enterprise Incentive Mgmt *Active Flag Active

*Version 1

▼ **Object Use**

☒ Production ☒ Use in UI?
☐ Staging ☒ Use in Rules?
☐ Reporting ☒ Use in Queries?
☐ System ☒ System Data
☐ Configuration

▼ **Persistence**

*Tools Record Name EI_BO_CHANL_TBL **Record Description** EIM Channel derived class

▼ **Derived Class Attributes**

Parent Class ROBJ **Menu Name** EI_COMP_ADMIN

Search Component **Menu Bar Name** BIZOBJECTS

Save Component EI_BO_CHANNEL_CI **Item Name** EI_BO_CHANNEL

Page Name EI_BO_CHANNEL

[Edit Component](#)

Object Catalog page (1 of 2)

▼ **Attributes**

Active	*Attribute Name	Field Name	Description		
<input checked="" type="checkbox"/>	EFFDT	EFFDT	Effective Date		
<input checked="" type="checkbox"/>	EI_CLASSID	EI_CLASSID	EI_CLASSID		
<input checked="" type="checkbox"/>	EIM_KEY	EIM_KEY	EIM Key		
<input checked="" type="checkbox"/>	SETID	SETID	SetID		

[Import Tools Fields](#)

▼ **Relationships**

Active	*Relationship Name	*Relationship Type	*Relationship Target	Rel Details	Description	View Class		
<input checked="" type="checkbox"/>		One-to-Many (Child)						

▼ **Extended Attributes**

Type	Name	*Value		
Record	CI_BASE_RECORD	EI_BO_BASE_WRK		
String	Group Class	RGRP		

Object Catalog page (2 of 2)

Note. Most fields on this page are defined in the Defining Base Class Object Information section of this chapter.

Parent Class

Select the base class ID from which this class is derived. In cases where the derived class object is to be registered as derived with no base class, leave this field blank.

Search Component	Specify the PeopleTools component used to search for instances of this derived class object. Query Builder is the default search component if no PeopleTools component is specified.
Save Component	Enter the PeopleTools component Interface used to save data for this derived class object.
Edit Component	<p>Enter the PeopleTools page parameters used to navigate to the edit component for this derived class object. The defined Edit Component is also used by Query Builder. Edit Component registration requests the PeopleSoft identifiers for page navigation. That includes the menu, menu bar (component), item and page names. This information is used to navigate to the appropriate page to edit information of the current object type. That is, given data of a certain object type, you can navigate to the specified Edit Component to edit that data.</p> <p>The system code can use the values in these fields to transfer the user to the edit component without having to hard-code the menu, component, and page name into the code itself with each occurrence. This makes generic and maintainable code. For example, when you use the Query Builder tool and see an list of products in the results, the product name might be a link. By clicking that link, Query Builder knows to take you to the edit component for products because it reads the metadata menu, component, and page names values that you enter for the product object on this page.</p>
Description	Enter a descriptive name for the attribute. This description name displays in the Sales Incentive Management system.

Note. The Description field is where you change metadata object names to match the terms used by your organization. For example, you could change the Class ID *PERS* Description field value from *Sales Person* to *Sales Representative*.

See Also

[Chapter 4, “Registering Base and Derived Classes,” Defining Base Class Object Information, page 81](#)

[Chapter 19, “Using Query Builder,” page 425](#)

CHAPTER 5

Managing User Interaction Objects

This chapter provides an overview of user interaction objects (UIOs) and discusses how to:

- Register UIOs.
- Clone UIOs.
- Construct configurable UIOs.
- Associate UIOs with a compensation structure.
- Review delivered UIOs.
- Review delivered pages and reports.

Understanding UIOs

This section lists common elements and discusses:

- UIO functionality.
- UIO types.
- UIO registration.
- Participant UI framework.
- Reporting infrastructure.
- Setup tasks for UIOs.

Common Elements Used in This Chapter

UIO Name and Description	Enter a name and description for this UIO. For participants associated with this UIO on a compensation structure, the system displays the UIO name on the My Sales Compensation page, as a link through which the participants can access this UIO.
Clone UIO	Click this button to access the Clone User Interaction Object page and create a new UIO based on this existing UIO. You can specify the specific pages from the existing UIO to clone as well as the attributes of the new UIO that you are creating. You might clone a UIO, for example, to use it in market templates differently, to configure it to meet business needs, or to test it without interrupting production.
Product Category	Select a product category to limit use of the UIO to that category. Currently the <i>Sales Incentive Management</i> product category is the only available option.

Market Template	If you select a product category, you can then select a market template within that product category to limit use of the UIO to that market template. Delivered market templates are <i>Banking & Capital Management</i> and <i>High-Tech & Industrial</i> , both of which are part of PeopleSoft Enterprise Sales Incentive Management.
System Data	The system automatically selects this check box if the UIO is delivered by PeopleSoft.

UIO Functionality

UIOs are extendable derived-class metadata objects that define PeopleSoft web pages and reports through which participants can access incentive calculation results. Participants and managers can then analyze and view reports on these results.

You associate UIOs with participants and plans on compensation structures. By doing so, your compensation administrator can determine the incentive compensation web pages and reports within PeopleSoft Enterprise Sales Incentive Management that a participant can access, based on the role and position of a participant in a compensation structure. Participants access the pages and reports for their assigned UIOs through links on the My Sales Compensation page.

UIOs work with PeopleTools applications to render the UIO pages and generate UIO reports for participants while hiding much of the report generation work. This functionality simplifies work for both the compensation administrator and the participant, and places most of the technical ownership of the UIOs with the system administrator.

Note. PeopleSoft delivers predefined UIOs in the sample database.

UIO Types

PeopleSoft Enterprise Sales Incentive Management supports three types of UIO derived class objects: UIO PeopleSoft Pure Internet Architecture pages (UOPG), UIO reports (UORP), and configurable UIOs (UODP). All three of these derived class objects have as parent class the user interaction base class object (UOBJ).

UIO PeopleSoft Pure Internet Architecture pages use PeopleTools concepts and objects to display incentive calculation results to participants. PeopleTools manages the presentation of incentive transaction data by retrieving the data and controlling its display on the PeopleSoft Pure Internet Architecture page.

You can initiate UIO reports in batch through a reporting engine, or participants can initiate reports directly from their My Sales Compensation page. In either case, a reporting process interfaces with Process Scheduler for creation, scheduling, and processing of the report and interfaces with Report Manager for report distribution. PeopleSoft Enterprise Sales Incentive Management supports both Crystal and SQR reports but delivers only predefined Crystal reports.

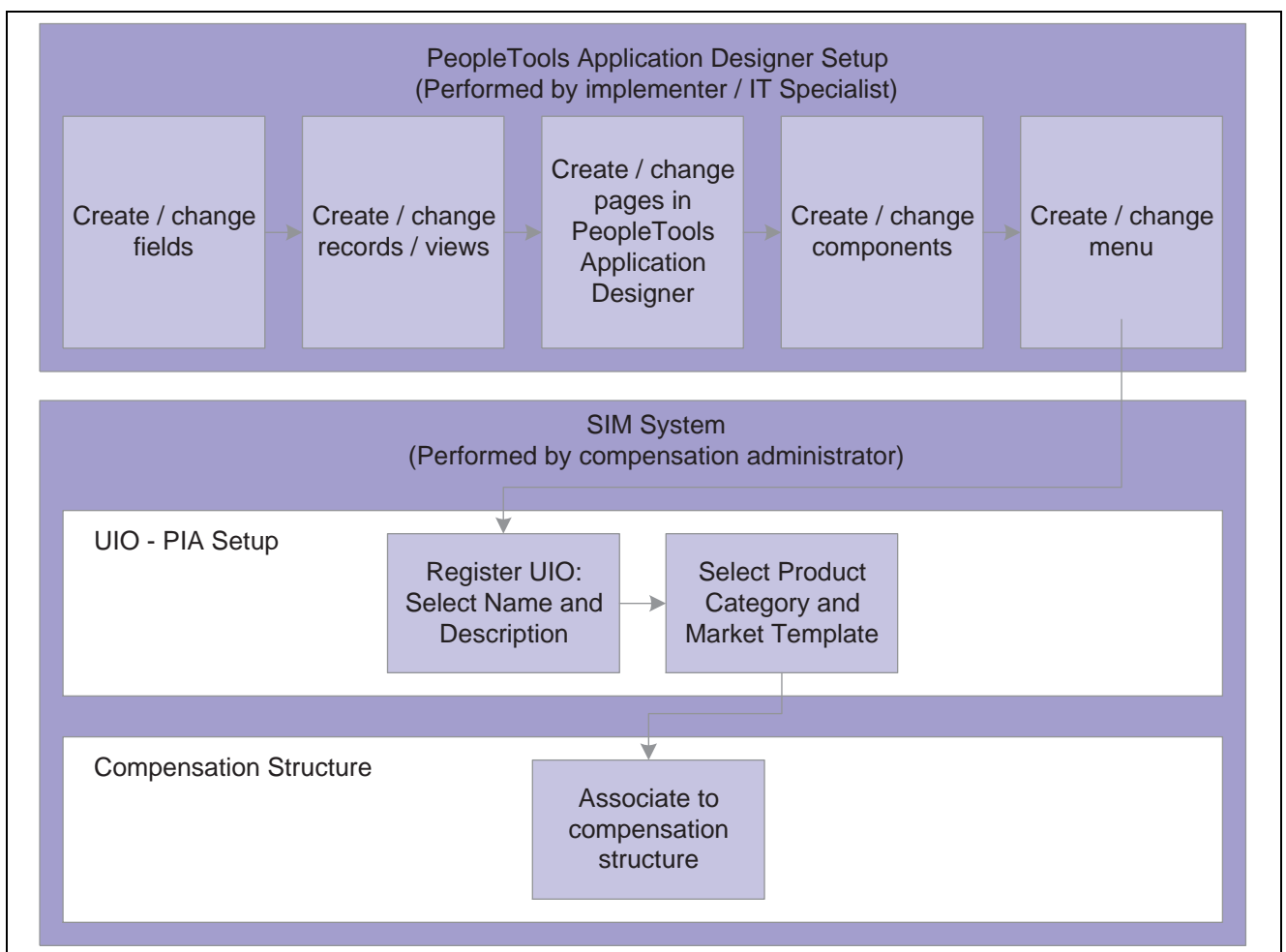
Configurable UIOs enable you to create and configure custom participant UI pages in a short period of time without extensive PeopleTools skills and experience. You define all aspects of the UIO through the configurable UIO PeopleSoft Pure Internet Architecture setup pages. Your definition controls the incentive information that participants see when they access the participant UI pages rendered through the Participant UI Framework.

Weigh the advantages and disadvantages of using configurable UIOs against using UIO PeopleSoft Pure Internet Architecture pages and UIO reports before proceeding in implementation.

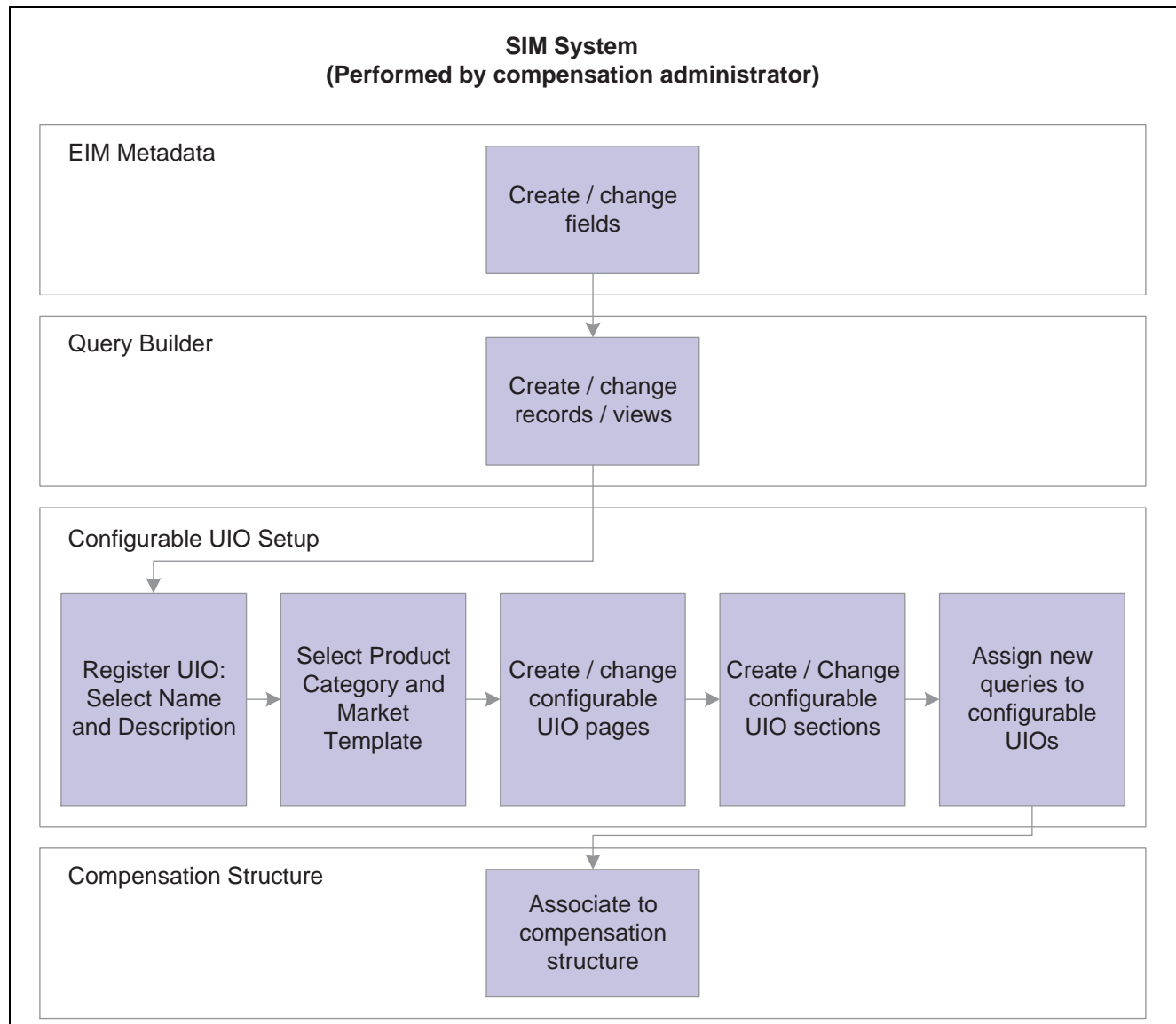
Typically, you'll use UIO PeopleSoft Pure Internet Architecture pages and reports when you need to create highly customized pages and reports with their own formatting, logo, layout, and so on. Implementers have a lot of freedom in designing layout, page flow, and contents. If deciding between a UIO PeopleSoft Pure Internet Architecture page and a UIO report, keep in mind that reports are typically easier to print (especially with charts) and offer more control over end period reporting than UIO PeopleSoft Pure Internet Architecture pages. UIO PeopleSoft Pure Internet Architecture pages, however, are more dynamic than reports, which are generally static and archival. Both UIO PeopleSoft Pure Internet Architecture pages and UIO reports require high upgrade efforts as well as proficient PeopleTools skills.

Configurable UIOs, on the other hand, are easy to upgrade, don't require PeopleTools skills, and save on implementation costs. Configurable UIOs enable implementers to easily configure UIO content and layout without directly manipulating PeopleTools objects or using PeopleSoft Application Designer to change the layout.

These diagrams illustrate the differences in design approach between UIO PeopleSoft Pure Internet Architecture pages and configurable UIOs:



UIO PIA page construction steps



Configurable UIO page construction steps

Construction steps for configurable UIOs are entirely within PeopleSoft Enterprise Sales Incentive Management, thus requiring only a single skill set.

See Also

Chapter 5, "Managing User Interaction Objects," Constructing Configurable UIOs, page 101

UIO Registration

Before you can associate UIOs to participant and plan combinations in a compensation structure, you must register the UIOs as metadata. Metadata registration enables you to display compensation results to participants through the UIOs. You register UIO PeopleSoft Pure Internet Architecture pages through the User Interaction - Pages component (EI_UO_PG) and UIO reports through the User Interaction - Reports component (EI_UO_RP). Registration for configurable UIOs occurs during creation through the User Interaction - Configurable component (EI_UO_DPG_DEFN).

When you register PeopleSoft Pure Internet Architecture page UIOs, you define the PeopleTools menu names and component IDs that the system must retrieve from the database. With this information, the system can dynamically render a link on the participant's main My Sales Compensation page.

When you register report UIOs, you define all of the PeopleTools information that the system needs to generate a participant report viewable to participants on their main My Sales Compensation page. The UIO definition includes the report to retrieve and display, the run control parameters to run for the report, and the report generation process to run. The component ID defines the PeopleTools menu and page information for the report being generated. This component ID is associated with a corresponding run control report and Process Scheduler process that defines the run parameters and actually runs the report.

Note. You register reporting UIOs only for participants. Compensation administrators can generate and manage their own reports using the standard PeopleSoft Process Scheduler run control pages.

You can, through the User Interaction - Groups component (EI_UIO_GRP), create groups of UIOs, which are composed of individually registered UIOs. UIO groups are geared towards compensation administrators to efficiently manage UIO assignment.

See Also

Chapter 20, “Managing the Participant Reporting Interfaces,” Creating UIO Groups, page 445

Participant UI Framework

The participant UI framework is a group of application classes that manage the accessibility, navigation, and display of participant UI pages and reports. The participant UI framework constructs a main page for each participant to provide participants with links to access application components based on position on the compensation structure and assigned UIOs. This page is called “My Sales Compensation.” The participant UI framework also leverages PeopleTools and PeopleSoft Enterprise Sales Incentive Management security settings to ensure appropriate data security.

To leverage the participant UI framework's ability to handle SIM security, use the recommended tasks to enable a PeopleSoft Pure Internet Architecture page component.

See Also

Chapter 20, “Managing the Participant Reporting Interfaces,” Security for the Participant UI Framework and Reporting Pages, page 441

Reporting Infrastructure

UIOs are one of the three key components that make up the PeopleSoft Enterprise Sales Incentive Management reporting infrastructure. The other two key components are the reporting data model and reporting engines.

See Also

Chapter 2, “Understanding Sales Incentive Management,” Reporting Infrastructure Components, page 24

Setup Tasks for UIOs

Organizations generally have two types of administrators maintaining the UIOs as appropriate for their role: a system administrator and a compensation administrator.

For UIO PeopleSoft Pure Internet Architecture pages and reports, system administrators register UIOs and can edit all UIO attributes. Compensation administrators have a more limited UIO editing role—they can edit certain non-PeopleTools related fields and can create UIO groups. Once compensation administrators have edited UIOs, they can use the UIOs to give participants access to reporting information.

For configurable UIOs, compensation administrators can perform all of the setup themselves.

Regardless of the UIO type, system administrators need to set up the reporting infrastructure, which involves the following tasks:

- For unscheduled reporting, confirm that the RENSVR has been installed and configured with your implementation.

RENSVR acts as the virtual participant during unscheduled report generation, shielding participants from interfacing with PeopleTools functionality, and pushing completed reports to a new browser window.

- For unscheduled and batch reporting, set up processes through PeopleSoft Process Scheduler.

Process Scheduler is another virtual participant, used during both unscheduled and batch report generation. PeopleSoft Enterprise Sales Incentive Management delivers pre-configured processes for all reports.

- Register UIOs for use by compensation administrators.

With this architecture in place, compensation administrators set up the following to facilitate the reporting process:

1. Attach UIOs to a participant on a compensation structure.
2. Define reporting engine steps on the Define Steps page.
3. Define reporting engine jobs on the Job Steps page.

Note. Predefined processes, process job names, step IDs, and process steps, are delivered in the sample database for all PeopleSoft Enterprise Incentive Management processes, including reporting.

See Also

[Chapter 5, “Managing User Interaction Objects,” Reviewing Delivered UIO Pages and Reports, page 131](#)

Registering UIOs

To register UIO pages and reports, use the User Interaction - Pages (EI_UO_PG) and User Interaction - Reports (EI_UO_RP) components.

This section list common elements and discusses how to:

- Set up UIO pages.
- Set up UIO reports.

Common Elements in This Section

Menu Name and Component ID

Specify the PeopleTools menu and component from which the system retrieves the defined page for this UIO. On the search page, enter the prefix *EI_* to locate delivered PeopleSoft Enterprise Incentive Management and PeopleSoft Enterprise Sales Incentive Management menus and components

in the sample database. You can view these objects through PeopleSoft Application Designer.

Pages Used to Register UIOs

Page Name	Object Name	Navigation	Usage
User Interaction - Pages	EI_UO_PG	Compensation, Sales Incentives, Define Sales Org Structure, User Interaction - Pages, User Interaction - Pages	Define a UIO that renders as a PeopleSoft Pure Internet Architecture page.
User Interaction - Report	EI_UO_RP	Compensation, Sales Incentives, Define Sales Org Structure, User Interaction - Reports, User Interaction - Reports	Define a UIO that renders as a Crystal or SQR report.

Setting Up UIO Pages

Access the User Interaction - Pages page.

User Interaction - Pages

SetID SHARE UIO ID 6800

User Interaction Object Details Find | View All First 1 of 1 Last

*Effective Date 01/01/1900 *Status Active

*UIO Name Search Utility Clone UIO

Description Search using pre-defined queries.

Product Category Sales Incentive Management ☒ System Data

Market Template

Page Details

*Menu Name EI_PART_UI

*Component ID EI_SRCH_UTILITY

User Interaction - Pages page

Setting Up UIO Reports

Access the User Interaction - Report page.

User Interaction - Report

SetID

SHARE

UIO ID

4507

User Interaction Object Details

Find

View All

First

1 of 1

Last

*Effective Date

01/01/1900

*Status

Active

*UIO Name

BCM Commission Statement

Clone UIO

Description

Sales Rep Commission Statement

Product Category

Sales Incentive Managemen

☒ System Data

Market Template

Banking & Capital Markets

Report Details

*Report Type

Crystal

*Process Type

Crystal

*Process Name

EISIBCP0

*Component ID

EI_BC_PAR_COMM

*Menu Name

EI_BC_PART_UI

*Page Name

EI_BC_PAR_COMM

*Record

EI_SI_RUNCNTL

Report Invocation Mode

☒ Ad-hoc

☐ Batch

User Interaction - Report page

Report Type and Process Type

Select *Crystal* for the report type and process type.

Note. The Report Type and Process Type fields include *Crystal* and *SQR* values. All the delivered UIO reports are in the Crystal format. However, if you create your own UIOs, you can configure them with either Crystal or SQR and specify the appropriate value on these pages.

Process Name

Select the process that invokes the specific PeopleSoft Enterprise Incentive Management report that you are defining. Report processes are defined with PeopleSoft Process Scheduler on the Processes page. Delivered PeopleSoft Enterprise Incentive Management processes begin with the prefix *EISIH*. The process name that you select determines the available values for the Component ID, Menu Name, Page Name, and process run control Record fields.

Note. If you are defining new reports, you can use delivered run control records.

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Page Name and Record

Specify the PeopleTools page and process run control record from which the system retrieves the defined report for this UIO. On the search page, enter the prefix *EI_* to locate the delivered PeopleSoft Enterprise Incentive Management and PeopleSoft Enterprise Sales Incentive Management values in the sample database. You can view these objects through PeopleSoft Application Designer.

Ad-hoc and Batch

Select Ad-hoc if this report object can be generated as a report by user request, or select Batch for a batch run. Ad hoc reports are generated on request by the participant. Batch report objects are generated in advance, during SIM job processing.

Note. All delivered UIO reports are set to Ad-hoc for faster processing of incentive plans.

Cloning UIOs

This section discusses how to clone UIOs.

Page Used to Clone UIOs

Page Name	Object Name	Navigation	Usage
Clone User Interaction Object	EI_UIO_COPY	<ul style="list-style-type: none"> • Compensation, Sales Incentives, Define Sales Org Structure, User Interaction - Pages, User Interaction - Pages Click the Clone UIO button. • Compensation, Sales Incentives, Define Sales Org Structure, User Interaction - Reports, User Interaction - Reports Click the Clone UIO button. • Compensation, Sales Incentives, Define Sales Org Structure, User Interaction - Configurable, User Interaction - Configurable Click the Clone UIO button. 	Create a new UIO by copying an existing UIO. This functionality works for all three UIO types—PeopleSoft Pure Internet Architecture pages, reports, and configurables.

Cloning UIOs

Access the Clone User Interaction Object page.

Configurable UIO

Clone User Interaction Object

Existing User Interaction Object

SetID SHARE

UIO ID 6000




Effective Date 01/01/1900

Product Category Sales Incentive Management

Market Template High Tech & Industrial

UIO Name Compensation Snapshot

Specify the pages from existing User Interaction Object you would like to clone.

Pages [Customize](#) | [Find](#) | [View All](#) |  First  1-8 of 8  Last

Page Name	Select
1 Compensation Summary	<input checked="" type="checkbox"/>
2 Payout Details	<input checked="" type="checkbox"/>
3 Payout History	<input checked="" type="checkbox"/>
4 Commission Details	<input checked="" type="checkbox"/>
5 Commission History	<input checked="" type="checkbox"/>
6 Opportunity Details	<input checked="" type="checkbox"/>
7 Order Summary	<input checked="" type="checkbox"/>
8 Order Summary (Release/Held)	<input checked="" type="checkbox"/>

[Select All](#) [Clear All](#)

Clone User Interaction Object page (1 of 2)

Specify the attributes of the new User Interaction Object you are creating.

New User Interaction Object Attributes

***UIO ID**

***Effective Date** 

Product Category

Market Template

***UIO Name**

Clone User Interaction Object page (2 of 2)

Cloning UIOs has several advantages that aid implementation. You can use existing UIOs as a template to create new UIOs, clone UIOs from one market template to another, and make backup and development copies of UIOs that are in your production environment.

Existing User Interaction Object

This group box displays key attributes of the existing UIO that you are cloning.

Pages

If you are cloning a configurable UIO, the system lists the pages in the existing UIO, so that you can select the pages to clone. By default, the system includes all pages from the existing UIO in the new UIO. Clear the Select check box next to a page to exclude that page from the new UIO. Click the Select All link to include all pages or the Clear All link to exclude all pages.

New User Interaction Object Attributes

Use this group box to enter the required key attributes for the new UIO. Assign an ID to the new UIO, then select the effective date and give the name to the new UIO. If applicable, select the product category and market template to which the UIO belongs. Click the Create button to create the new UIO. The system displays the new cloned UIO.

Note. Cloning a UIO does not clone any associations that you have made to compensation structures.

Constructing Configurable UIOs

To construct configurable UIOs, use the User Interaction - Configurable (EI_UO_DPG_DEFN) component.

This section provides an overview of configurable UIOs, lists common elements, and discusses how to:

- Define configurable UIO details.
- Define UIO styles.
- Define pages for configurable UIOs.
- Define page titles for configurable UIOs.
- Define text sections.
- Define separator sections.
- Define query sections.
- Define variables sections.
- Define field drilldowns.
- Define row transfers.
- Define section transfers.
- Set chart display options.
- Preview configurable UIO pages.

See Also

Chapter 20, “Managing the Participant Reporting Interfaces,” Reviewing Participant Sales Compensation Information, page 455

Understanding Configurable UIOs

A configurable UIO is a derived class object (UODP) that enables compensation administrators, IT specialists, and implementers to create and configure custom participant UI pages in a short period of time without extensive PeopleTools skills and experience.

Configurable UIO Definitions

When constructing configurable UIO definitions, you define all aspects of the participant UI pages through PeopleSoft Pure Internet Architecture pages. Through the User Interaction - Configurable setup component, you can design configurable UIO definitions that control the report that participants see when they access the participant UI pages that the system renders based on the definition. These definitions are instances of the configurable UIO derived class object.

Configurable UIO definitions include:

- One or more participant UI pages that you define, including the default page of the participant UI.
- Page layout, including titles, content, and sections.
- Navigation between the pages of the configurable participant UI through links, transfers, or drilldowns.

You can define pages as summarized or detailed as you want, and you do not need to use PeopleSoft Application Designer to manipulate objects or change the layout.

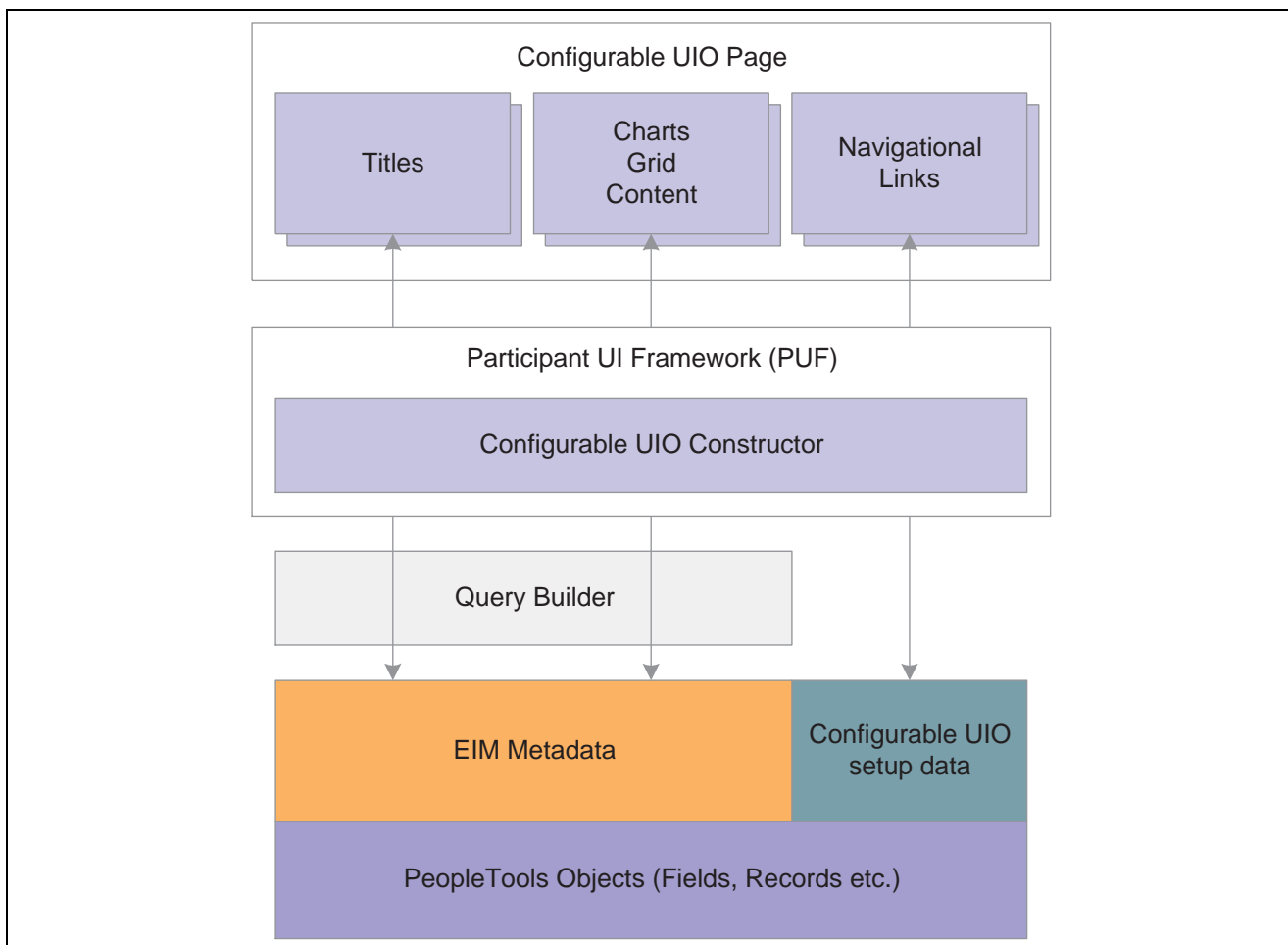
The content defines data sources for a page. You divide content into sections and use as data sources for the section content either static text, separators, variables, or predefined queries within Query Builder. A predefined query is a stored combination of output fields and query criteria within Query Builder.

If you use query sections, the participant UI framework invokes the Query Builder API and runs these queries at runtime to render the participant UI page content. This integration with the Query Builder tool is beneficial because if the data source includes changes to records, fields, or the page layout, you need only change the setup data for the configurable UIO definition. You do not need to invoke PeopleSoft Application Designer. For example, say that you needed to add a new derived class for transactions and display this transaction data to participants through the participant UI. If you are using a UIO PeopleSoft Pure Internet Architecture page, you must have the PeopleSoft Application Designer skills to change the page, its views, and its objects. If you are using a configurable UIO, you only change the predefined queries, leaving the page untouched.

As a derived class of UIO, configurable UIOs are naturally integrated into the compensation structure. Once you complete the setup, you assign configurable UIOs to participants and plans in compensation structures. The system generates UIO context when you attach the UIO to a compensation structure with a plan and participant combination.

Configurable UIO Architecture

This diagram illustrates the architecture, components, and process flow of configurable UIOs:



Configurable UIO architecture

SIM metadata and configurable UIO definition data encapsulate PeopleTools objects, such as fields and records. At runtime, the participant UI framework accesses this information and renders the pages within the configurable UIO definition. More specifically, the participant UI framework invokes the Query Builder API and runs the predefined queries (for query sections and variable sections) and has the configurable UIO constructor render the participant UI pages. The configurable UIO constructor component of the participant UI framework generates configurable UI pages based on the configurable UIO definition. Thus, when participants log into their main My Sales Compensation page, which the system dynamically generates based on participant security access and UIO assignments, they can then access the default participant UI page of the configurable UI definition. From the navigation links on the default page, they can access the other pages of the configurable UIO definition.

Step-by-Step Instructions for Implementing Configurable UIOs

To implement a configurable UIO:

1. Create a design for the main configurable UIO page and all its supporting pages.

The supporting pages are target pages for field, section, and row transfers. Transfers are the means by which users can navigate between the pages of the configurable UIO.

When designing these pages:

- Consider the hierarchy and content of all pages.
- Determine the sections for each page.

- Determine how to transfer from one page to another.
2. Populate the tables that you will use for the configurable UIO pages with meaningful data so that you can test and preview the page.
 3. If required, create the necessary supporting views in PeopleSoft Application Designer.
Create views for the complex queries, such as outer join queries, to use on pages that the Query Builder tool does not support. In general, create views if the query is too complex.
 4. Register the records and views that you are using in the configurable UIO in EQR_Y_TREE by adding a new access group for your configurable UIO under the EIM_PARTICIPANT_RPTS folder.
The system requires that you register these objects so that the Query Builder tool has security access to them when running queries. To access the query tree, select PeopleTools, Security, Query Security, Query Access Manager.
 5. Register the records and views on the Object Catalog page.
Ensure that you properly establish the relationships between objects when registering them.
To access the Object Catalog page, select Compensation, Sales Incentives, Define Sales Incentive Options, Object Catalog.
 6. Use the Query Builder tool to construct the queries to use for the configurable UIO.
In the Query Type field, select *Configurable UIO*.
To access the Query Builder tool, select Compensation, Sales Incentives, Query Builder.
See [Chapter 19, “Using Query Builder,” page 425](#).
 7. Construct the configurable UIO as described in this section.

Common Elements Used in This Section

Display Order	Enter in numerical ascending order the order to display titles, sections, links, or fields on the page.
Hide All	Click to clear the Visible check box for all fields in the grid.
Label	Enter the label for the field. The system displays this label when it renders the field on the participant UI page for this section.
Link Name	Enter the name of the link, for information purposes only.
Mouse Over Text	Specify the text to appear when a user hovers the mouse over the given link.
Preview Page	Click this link to preview the layout of the page. This is what the page will look like when the participant access it through the participant UI associated with this UIO.
Section Name and Description	Enter a name and description of the section.
Show All	Click to select the Visible check box for all fields in the grid.
Source	Select a predefined query. Available queries are defined as configurable UIO query types. This field becomes available for edit only if you select <i>Query</i> as the source type.

Style	Select a style for the title or label. You define styles for this configurable UIO on the UIO Styles page.
Title Type	Select the type of title to display, either <i>Text</i> to display static text or <i>RunTime</i> to display a runtime value. When you define title details, you can select whether this runtime value is a participant, territory, or period name.
View All	Select this option to enable managers to view information for all subordinates for the current plan context.
View Direct Reports Only	Select this option to enable managers to view information within the current plan context for subordinates who are direct reports only. The system selects this option by default.
View Subordinates	Select this check box to display subordinate information on the Subordinate's Commission participant UI that the system renders for this page.
Visible	Select this check box to make the given object visible to the participant when the system renders this page through the participant UI. If applicable, your selection from the previous page appears by default.

Pages Used Construct Configurable UIOs

Page Name	Object Name	Navigation	Usage
User Interaction - Configurable	EI_UO_DPG_DFN	Compensation, Sales Incentives, Define Sales Org Structure, User Interaction - Configurable, User Interaction - Configurable	Define key attributes of the configurable UIO (such as market template and product category), the names of pages within the configurable UIO, the visible pages, and the default page. Also validate the configurable UIO. You can create a configurable UIO from scratch or clone an existing configurable UIO.
UIO Styles	EI_DPG_STYL_SEC	Click the Define UIO Styles link on the User Interaction - Configurable page.	Define the styles to use within a configurable UIO by assigning the style a name and a PeopleTools style class.
Page	EI_DPG_PG_DEFN	Click the Show Object Properties button on the User Interaction - Configurable page.	Define the titles, content, and navigation links for a page within a configurable UIO.
Page Title	EI_DPG_PTTL_MSGS	Click the Details button for a specific title on the Configurable UIO - Page page.	Define the key attributes for a page title within a configurable UIO.
Text Section	EI_DPG_SEC_TXT	Click the Details button for a section with a text source type on the Configurable UIO - Page page.	Define the attributes and body of a text section on a configurable UIO page.

Page Name	Object Name	Navigation	Usage
Separator Section	EI_DPG_SEC_SEP	Click the Details button for a specific section with a separator source type on the Configurable UIO - Page page.	Define display options for a separator section of a configurable UIO page.
Query Section	EI_DPG_QRY_DTLS	Click the Details button for a section with a query source type on the Configurable UIO - Page page.	Define the query section, including the data source, security option, body, and its different types of transfers. Query sections run a predefined configurable UIO query that you select as the data source.
Variables Section	EI_DPG_SEC_VRBL	Click the Details button for a section with a variables or opportunity variables source type on the Configurable UIO - Page page.	Define, for a variable section on a configurable UIO page, the security setting for viewing subordinates, the section attributes, and the section body. Also define section transfer links.
Field	EI_DPG_FDD_SEC	Click the Attributes link for the field on the Query Section page.	Define, for a query section on a configurable UIO page, the security setting for viewing subordinates, the section attributes, and the section body. The section body definition includes fields from the query to use in the section, plus row transfer and section transfer links.
Row Transfer	EI_DPG_RDD_SEC	Click the Details button for a row transfer on the Query Transfer page.	Define the key attributes, display type, and mouse-over text for a row transfer link. When the system renders the participant UI, it displays the row transfer link in the leftmost column of the grid for the section.
Section Transfer	EI_DPG_SDD_SEC	Click the Details button for a section transfer on the Query Section page.	Define the key attributes, target page, and text for a section transfer link.
Chart Display Option	EI_DPG_CHRT_OPTNS	Click the Chart Display Options link on the Query Sections page.	Define how to render a chart for a query section by selecting the chart type, chart options, and other attributes.
Page Preview	EI_UO_DPG_PRVW_SEC	Click the Preview Page link on the User Interaction - Configurable page.	Preview the layout of the page that you have created for the configurable UIO.

Defining Configurable UIO Details

Access the User Interaction - Configurable page.

User Interaction - Configurable

SetID: SHARE UIO ID: 6000

User Interaction Object Details Find | View All First 1 of 1 Last

*Effective Date: 01/01/1900 *Status: Active

*UIO Name: Compensation Snapshot Clone UIO ☒ System Data

Description: Compensation Snapshot

Product Category: Sales Incentive Management

Market Template: High Tech & Industrial Define UIO Styles Validate

Page		Customize	Find	First	1-8 of 8	Last
	*Page Name	Default	Visible			
1	Compensation Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Preview Page	+	-
2	Payout Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Preview Page	+	-
3	Payout History	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Preview Page	+	-
4	Commission Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Preview Page	+	-
5	Commission History	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Preview Page	+	-
6	Opportunity Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Preview Page	+	-
7	Order Summary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Preview Page	+	-
8	Order Summary (Release/Held)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Preview Page	+	-

User Interaction - Configurable page

User Interaction Object Details

Enter key information about the configurable UIO that you are defining.

Define UIO Styles

Click this link to access the UIO Styles page and define font styles for the titles and labels on the participant UI that the system renders based on this UIO.

Validate

Click this button to have the system perform a series of validations to ensure the validity of the UIO. The system validates various aspects related to pages, main query objects, styles, general transfers, field transfers, row transfers, and query sections. Upon completion of the validation, the system displays a message that lists invalid aspects.

You can refer to a complete list of the validations that the system performs.

Page

Use the Page grid to define the default initial page and supporting pages to include as part of the participant UI that the system renders based on this UIO. The grid lists the primary attributes of the pages that you define, provides access to define page details, and enables you to preview how the system renders each page when participants access it through the participant UI.

Show Object Properties	Click this button to access the Configurable UIO - Page page and manage the definition of each page that you add to the configurable UIO.
Page Name	Enter a name for the page that you are including as part of the participant UI for this UIO. When you create the page definition, you can assign the page name to one of the page titles. The system uses the value that you enter in this field as a page title on the participant UI that it generates from this UIO.
Default	Select this check box to set the corresponding page as the initial page to appear in the participant UI that the system renders for this UIO. You can select only one default initial page, and that page must be visible.
Visible	<p>Select this check box to make the page visible to the participant when the system renders the participant UI for this UIO. The page also becomes available as a transfer target.</p> <p>A transfer target is the target page of a drilldown or link. A configurable UIO consists of one or more pages. Each page consists of one or more sections. A section can be one of several types. If the section type is a query section, you can define a field or column as a field transfer. This field transfer enables participants who are accessing the page through the participant UI the ability to click the drilldown or link to transfer to another page. The page to which the participant transfers is the transfer target. For a page to be available as a transfer target, you must select the Visible check box for that page.</p>

Note. If a page is a transfer target of another page, you cannot delete the page unless you first remove the field transfers that reference the page as a transfer target. If you attempt to delete a page that is a transfer target, the system prevents you from doing so and displays a message that lists sources of the transfer dependencies.

Defining UIO Styles

Access the UIO Styles page.

Configurable UIO

UIO Styles

SetID SHARE **UIO ID** 6000 **Effective Date** 01/01/1900

UIO Styles Customize | Find | First ◀ 1-3 of 3 ▶ Last

	Style	StyleClass Name		
1	Page Heading	PALEVEL0PRIMARY		
2	PageTitle	PAPAGETITLE		
3	UIO Title	PATRANSACTIONTITLE		

UIO Styles page

Style

Enter a name for the style that you are defining. The system uses these style names as the field values for the Style field on the Configurable UIO - Page page. When defining pages for this configurable UIO, you apply these styles to titles.

StyleClass Name

To define style attributes, map the style to a PeopleTools style class by selecting the name of the style class.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer*, “Creating Style Sheet Definitions”

Note. You cannot delete or rename a style unless you first remove all instances of its use. When validating the UIO, the system ensures that the styles in the UIO are valid. The system displays a message that lists the pages and titles within the UIO that use an invalid style.

Defining Pages for Configurable UIOs

Access the Configurable UIO - Page page.

Configurable UIO

Page

SetID SHARE **UIO ID** 6000 **Effective Date** 01/01/1900

Page Name Compensation Summary ☒ **Visible** ☒ **Default Initial Page**

Description

☒ **Show Printable Version Link**

☒ **Show Titles**

▼ **Titles**

Customize | Find |

First ◀ 1-6 of 6 ▶ Last

*Title	Style	Title Type		Visible	Display Order		
<input type="text" value="UIO Name"/>	<input type="text" value="UIO Title"/>	<input type="text" value="Text"/>		<input checked="" type="checkbox"/>	<input type="text" value="5"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Page Name"/>	<input type="text" value="PageTitle"/>	<input type="text" value="Text"/>		<input checked="" type="checkbox"/>	<input type="text" value="10"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Participant"/>	<input type="text" value="Page Heading"/>	<input type="text" value="RunTime"/>		<input checked="" type="checkbox"/>	<input type="text" value="15"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Territory"/>	<input type="text" value="Page Heading"/>	<input type="text" value="RunTime"/>		<input checked="" type="checkbox"/>	<input type="text" value="20"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Relationship"/>	<input type="text" value="Page Heading"/>	<input type="text" value="RunTime"/>		<input checked="" type="checkbox"/>	<input type="text" value="25"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Period Name"/>	<input type="text" value="Page Heading"/>	<input type="text" value="RunTime"/>		<input checked="" type="checkbox"/>	<input type="text" value="30"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

☒ **Show Content**

Configurable UIO - Page page (1 of 2)

Sections

Customize Find

First 1-13 of 13 Last

	Section Name	Source Type	Source	Visible	Display Order		
	Payout Summary	Query	EI_SI_PAYSUM_QRY	<input checked="" type="checkbox"/>	5	+	-
	Blank Line	Separator		<input checked="" type="checkbox"/>	10	+	-
	Performance Summary	Variables		<input checked="" type="checkbox"/>	15	+	-
	Blank Line	Separator		<input checked="" type="checkbox"/>	20	+	-
	Perf Meas Instructional	Text		<input checked="" type="checkbox"/>	25	+	-
	Commission by Perform	Query	EI_SI_COMSUM_QRY	<input checked="" type="checkbox"/>	30	+	-
	Blank Line	Separator		<input checked="" type="checkbox"/>	35	+	-
	Held Instructional Text	Text		<input checked="" type="checkbox"/>	40	+	-
	Commission by Transa	Query	EI_SI_PTNTL COMP_Q	<input checked="" type="checkbox"/>	45	+	-
	Blank Line	Separator		<input checked="" type="checkbox"/>	50	+	-
	Opportunity Performan	Opp Vars		<input checked="" type="checkbox"/>	55	+	-
	Blank Line	Separator		<input checked="" type="checkbox"/>	60	+	-
	Projected Commission	Query	EI_SI_OPPSUM_QRY	<input checked="" type="checkbox"/>	65	+	-

☒ Show Navigation Links

☒ Return Link
 ☐ Default Initial Page Link

☐ Home Page Link
 ☒ Search Utility Link

Preview Page

* Required Field

OK

Cancel

Apply

Configurable UIO - Page page (2 of 2)

Note. Begin building a configurable UIO from the lowest-level page.

Key Attributes

The system displays key attributes that the page inherits from the configurable UIO. You set these values on the User Interaction - Configurable page.

Show Printable Version Link Select this check box to show the printable version button on the participant UI.

Titles

Use the Titles grid to add titles to the header of the page. When the system renders the page for participants, it displays these titles in the top-left corner of the page according to styles, title types, and display order that you define for each title.

Show Titles	Select this check box to show title information on the page when the system renders it viewable to the participant through the participant UI. When selected, the Titles grid becomes available for edit, so that you can define the titles for the page.
Copy Titles	Click this button to copy titles from the default initial page to another page within the configurable UIO definition. The system copies all title attributes into the Titles grid.
Title	Enter a descriptive name for each of the titles that you define. When you preview this page, the system displays this text as a placeholder for the runtime title type and displays the exact text for a static text title type.
Click for details	Click this button to access the Page Title page and define title attributes in more detail.

Sections

Use the Sections grid to define sections to the body of the page. When it renders the page, the system displays sections after the titles but before the navigational links. The system displays sections according to details that you define in the grid.

Note. The system checks to detect invalid queries, transfers, and data.

Show Content	Click this link to show body information on the page when the system renders it viewable to the participant through the participant UI. When selected, the Sections grid becomes available for edit, so that you can define the sections of the body.
Click for details	<p>Click this button to access the section definition page and define section attributes in more detail. The system displays the appropriate page according to the source type of the section.</p> <p>See Chapter 5, “Managing User Interaction Objects,” Defining Query Sections, page 116.</p> <p>See Chapter 5, “Managing User Interaction Objects,” Defining Separator Sections, page 115.</p> <p>See Chapter 5, “Managing User Interaction Objects,” Defining Variables Sections, page 120.</p> <p>See Chapter 5, “Managing User Interaction Objects,” Defining Text Sections, page 114.</p>
Collapsed By Default	Select to make the section collapsed by default when participants access it through the participant UI page.
Make Sections Collapsible	Select to make the section collapsible when the system renders it on the on the participant UI page.
Section Name	Enter a descriptive name for each section that you define. The value that you enter is for information purposes only.
Source Type	<p>Specify the type of source for the section. Select from:</p> <ul style="list-style-type: none"> • <i>Query</i>: Select to specify any predefined queries that have a query type of configurable UIO.

The Source field becomes available for edit, so that you can select the query. These queries all have a main object that has a CONTEXT attribute, because UIOs are context-based. If the main object also has a PERIOD_CONTEXT attribute, you can make the query sections period-based when you define the details of the query section on the Query Section page.

- *Text*: Select to specify a long string of static text for the section, such as instructional text.
- *Separator*: Select to separate two sections from each other with either a single space, double space, or horizontal line.

Separator sections give a more visible separation between two other sections, making the page easier to read.

- *Variables*: Select to automatically display variables for the current plan context and period context.
- *Opp Vars* (opportunity variables): Select to automatically display opportunity variables for the current plan context and period context.

Navigation Links

Show Navigation Links	Select this check box to include navigational links in the footer of the generated page. The navigation links become available for edit, so that you can select which links to appear when the system renders this page to the participant.
Return Link	Select this check box to have a Return link appear at the bottom of the page. If the participant clicks this link, the system returns the participant to the previous page.
Home Page Link	Select this check box to have a My Sales Compensation link appear at the bottom of the page. If the participant clicks this link, the system displays the participant's main My Sales Compensation page.
Default Initial Page Link	Select this check box to have a Default Initial Page link appear at the bottom of the page. If the participant clicks this link, the system displays the default initial page for the current UIO.
Search Utility Link	Select this check box to have a Search link appear at the bottom of the page. If the participant clicks this link, the system invokes the Participant Search utility and displays the Search Utility page, where participants can use predefined participant queries to search for specific information in the database.

Defining Page Titles for Configurable UIOs

Access the Configurable UIO - Page Title page.

Configurable UIO

Page Title

Title UIO Name

Display Order 5 ☒ **Visible**

Title Type Static Text

Style UIO Title

Runtime Value

Title Text Compensation Snapshot

Page Title page

The system displays the selections that you have made on the Configurable UIO - Page page for the Visible, Title Type, and Style fields in the corresponding fields on this page. You can override these selections.

Runtime Value

If you selected to have a runtime title, select whether this runtime value is a *Participant*, *Period Name*, *Relationship*, or *Territory*. When participants access this page through a participant UI, the system substitutes this keyword for the actual text of the runtime value and renders the runtime value in the style that you have selected for this title.

Title Text

If you selected to have a text title, enter the text for the title here. The system displays the title according to the style that you have assigned to it.

Defining Text Sections

Access the Text Section page.

Configurable UIO

Text Section

Section Name Perf Meas Instructional Text

Description

Display Order 25 ☒ **Visible**

Source Type Text

Section Attributes

☐ **Make Section Collapsible**

☒ **Collapsed By Default**

Section Body

☒ **Show Body**

Style

Text Select a Performance Measure below to see which Orders contributed to your Commission.

* Required Field

OK Cancel

Text Section page

The system displays the selections that you have made on the Configurable UIO - Page page for the Section Name, Display Order, Source Type, and Visible fields in the corresponding fields on this page. You can override these selections.

Show Body

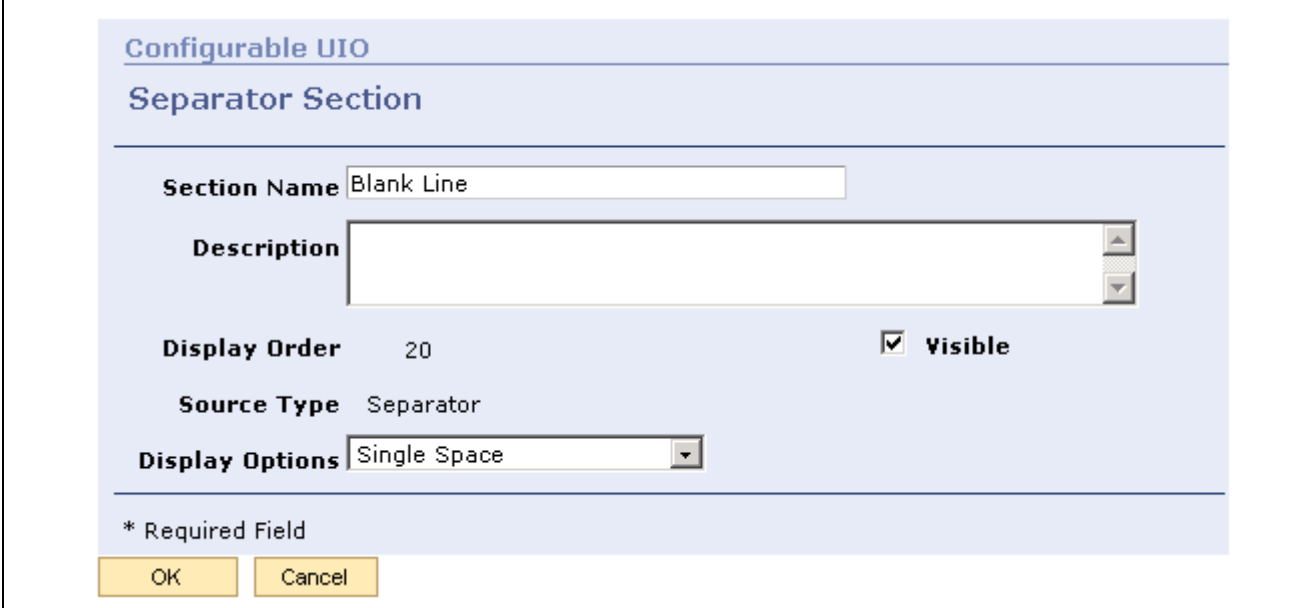
Select to make the content of this section visible when participants access the section through the participant UI page.

Text

Enter the static text for the section here, such as instructional text. The system displays the text according to the style that you have assigned to it.

Defining Separator Sections

Access the Separator Section page.

The screenshot shows a web form titled "Configurable UIO" with a sub-section "Separator Section". The form contains several fields: "Section Name" with the value "Blank Line", "Description" with an empty text area, "Display Order" with the value "20", "Source Type" with the value "Separator", and "Display Options" with a dropdown menu showing "Single Space". There is a checked checkbox labeled "Visible". At the bottom, there is a note "* Required Field" and two buttons: "OK" and "Cancel".

Configurable UIO

Separator Section

Section Name Blank Line

Description

Display Order 20 ☒ **Visible**

Source Type Separator

Display Options Single Space

* Required Field

OK Cancel

Separator Section page

The system displays the selections that you have made on the Configurable UIO - Page page for the Section Name and Visible fields in the corresponding fields on this page. You can override these selections.

Display Options Select a display option for the separator: *Single Space*, *Double Space*, or *Horizontal Ruler*.

Defining Query Sections

Access the Query Section page.

Configurable UIO

Query Section

SetID SHARE **UIO ID** 6000

Section Name

Description

Display Order 5 ☒ **Visible**

Source Type EIM Query ☒ **Period Based**

Source Payout Summary Query [Go to Query Builder](#)

Security Option

☐ View Subordinates
 ☒ View All
 ☐ View Direct Reports Only

Section Attributes

☒ Collapsible Section ☐ Use Query Builder Aggregation
☐ Collapsed By Default

Query Section page (1 of 3)

Section Body

Display Type

Chart Display Options ☐ Show Grid First

Grid Label ☐ Display Horizontally

Grid Section

Fields

[Customize](#) | [Find](#) | [View All](#) |

First

1-7 of 7

Last

Attributes	Label	Visible	Display Order
PmntCode - Description	<input type="text" value="Payment Code"/>	<input checked="" type="checkbox"/>	<input type="text" value="5"/>
PayoutRO - Context	<input type="text" value="Context"/>	<input type="checkbox"/>	<input type="text" value="10"/>
PayoutRO - Payment Code	<input type="text" value="Payment Code"/>	<input type="checkbox"/>	<input type="text" value="15"/>
PayoutRO - Payout Amount	<input type="text" value="Payout Amount"/>	<input checked="" type="checkbox"/>	<input type="text" value="20"/>
PayoutRO - Period Context	<input type="text" value="Period Context"/>	<input type="checkbox"/>	<input type="text" value="30"/>
PayoutRO - Period Name	<input type="text" value="Period Name"/>	<input type="checkbox"/>	<input type="text" value="35"/>
PayoutRO - UOM	<input type="text" value="UOM"/>	<input checked="" type="checkbox"/>	<input type="text" value="40"/>

[Show All](#) [Hide All](#)
 Click "Reload Fields" to synchronize Field scroll items with the query definition
 [Reload Fields](#)

Query Section page (2 of 3)

☐ **Show Row Transfer**

Row Transfer Customize | Find | First 1 of 1 Last

Link Name	Display Type	Target Page	Visible	Display Order
Push Btn	Prob Rptg		<input checked="" type="checkbox"/>	0 + -

☒ **Show Section Transfer**

Section Transfer Customize | Find | First 1 of 1 Last

Link Name	Visible	Display Order
Payout History	<input checked="" type="checkbox"/>	10 + -

* Required Field

OK Cancel

Query Section page (3 of 3)

Key Attributes

Period Based

Select to display the results of the query in the section of the page based on a period context. To use the period-based option, the main object of the query must have a PERIOD_CONTEXT attribute. The system validates the existence of this attribute for the object's class ID upon saving the page.

Go to Query Builder

Click this link to access the Query Builder - Results Columns page and modify the query that you selected in the Source field.

Section Attributes

Use Query Builder Aggregation

Select this check box to bypass configurable UIO formatting and let the Query Builder tool run queries and render and format section results. The system displays the resulting grid exactly as the Query Builder tool grid result instead of displaying a preprocessed grid that the configurable UIO constructor generates. When selected, you can leverage the Query Builder tool aggregation capabilities. However, you cannot support transfers, unified unit of measure (UUOM) totaling, and UUOM decimal formatting.

Section Body

Display Type

Select how to display data within this query section. Your choices are: *Chart Only*, *Grid & Chart*, or *Grid Only*.

If you select *Chart Only*, the Chart Display Options link becomes available.

If you select *Grid & Chart*, the Show Grid First and Display Horizontally check boxes and the Chart Display Options link become available.

Grid Label

Enter a title to display for the grid when rendered.

Chart Display Options

Click this link to access the Chart Display Option page and further define chart display.

Show Grid First

Select to display the grid before the chart, if you have selected to display both a grid and a chart. Otherwise, the system displays the chart first.

Display Horizontally

Select to display the grid and chart side-by-side, if you have selected to display both a grid and chart. Otherwise, the system displays the grid and chart vertically.

Fields**Attributes**

Lists all of the output fields of the source query that you selected in the Source field. Click a field name to access the Field page and define key field attributes, such as whether the field shows totals, and its link drilldown properties.

Reload Fields

Click to reload output fields of the query section into the grid. Use this button to synchronize fields in the grid with the metadata for query output fields. If the query has been changed, the system detects these changes and reloads only the changes into the grid.

Row Transfer**Show Row Transfer**

Select this check box to enable row transfer links in the section when the system renders the page viewable to the participant through the participant UI.

Click for details

Click this button to access the Row Transfer page and define details of the row transfer link, such as the display type and mouse-over text. If you select the Show Row Transfer check box and select *Details* in the Target Page field, you can also define the output fields of the source query to display on the details page for a selected object. When the system renders the details page to participants, it displays a grid of the visible fields for the selected object in the display order that you designate.

Display Type

Select the type of row transfer link to create, either a link, image, or button. After you select the display type, click the Details link to access the Row Transfer page and define display details.

Target Page

Select the target page for the row transfer. Your choices are:

- *Problem Reporting*: Select to launch the problem reporting page, for the participant to report a problem.
- *Details*: Select this value in conjunction with the Show Row Transfer button to display, on a details page, more source query output fields in addition to the fields in the Fields grid that you have selected to display for a particular row of data .

Then click the Click for details button to access the Row Transfer page and specify in the Fields grid on that page the visibility and display order of the fields.

Section Transfer**Show Section Transfer**

Select this check box to enable one or more section transfer links in the section when the system renders the page viewable to the participant through the participant UI.

Click for details

Click this button to access the Section Transfer page, where you can define the details of the row transfer link, such as the target page and text.

Defining Variables Sections

Access the Variables Section page.

Configurable UIO

Variables Section

SetID SHARE UIO ID 6000

Section Name Performance Summary

Description

Display Order 15 ☒ Visible

Source Type Variables ☐ Period Based

Security Option

☐ View Subordinates ☒ View All ☐ View Direct Reports Only

Section Attributes

☒ Collapsible Section
☐ Collapsed By Default

Section Body

Grid Section

☐ Show Drill to Aggregator Dtls Variables Display PM & Non PM Variables

☒ Show Section Transfer

Section Transfer Links Customize Find First 1 of 1 Last

Link Name	Visible	Display Order
<input type="text"/>	<input checked="" type="checkbox"/>	0

* Required Field

OK Cancel

Variables Section page

Key Attributes

Period Based

Selected automatically. Variables are always based on period context, processed by period.

Grid Section

Show Drill to Aggregator Dtls(details)

Select to enable links on accesses of aggregator/attainment variables, so that participants can view the contributing transactions. The system displays a page containing all the transactions, if any, that contributed to the aggregator/attainment accesses.

Note. The system allows aggregator drill to details on non-shared accesses only due to security implications on shared accesses.

Variables Display

Select the type of variable data to display in this section. Your choices are:

- *PM Variables Only:* Select to display a grid that lists all variables belonging to the performance measure groups that are defined for the plan and the participant combination.

The system displays the data in an easy-to-read, cross-tab format, where sections are the row headers and variable labels are the column headers. Each performance measure group has its own grid.

- *PM & Non PM Variables:* Select to display both performance measure variables and non-performance measure variables for the plan and participant combination.
- *Non PM Variables Only:* Select to list variables that do not belong to performance measure groups but that are defined for the plan and the participant combination.

Section Transfer Links

Show Section Transfer

Select this check box to enable section transfer links in the section when the system renders the page viewable to the participant through the participant UI.

Click for details

Click this button to access the Section Transfer page and define row transfer link details such as target page and text.

Defining Field Drilldowns

Access the Field page.

Configurable UIO

Field

Field

PmntCode - Description

Description

Display Order

5

☒ Visible

☐ Show Total

Label

Payment Code

☒ Show Link

DrillDown Properties

Target Page ID

Payout Details

Bind Class ID

PayoutRO

Bind Field Name

Payment Code

Mouse Over Text

Payout Details

Target Class ID

EIMTransactionRT

Target Field Name

Payment Code

* Required Field

OK

Cancel

Field page

Key Attributes

Show Total

Select this check box to calculate and display the total amount of this field at the bottom of the grid for this section when the field is rendered on the participant UI. Available only for numeric fields.

Drilldown Properties

Use this group box to define transfer attributes of the field drilldown link.

Show Link

Select this check box to make the field drilldown link visible to the participant when the participant accesses the section through the participant UI. The Target Page ID field becomes available for edit.

Target Page ID

Select the ID of the page that is the target of the field drilldown. You can only select from visible pages with one query section that are within the same configurable UIO, excluding the current page.

Bind Class ID

Select the source class ID to pass as a bind value to the target page of the field drilldown. Available values are all class IDs for the query output.

Bind Field Name	Select the source field to pass as a bind variable to the target page. Available values are all attributes for the bind class that you selected.
Target Class ID	Select the target class ID to map to the field drilldown. Available values are all class IDs for the target query output.
Target Field Name	Select the target field to map to the field drilldown. Available values are all attributes for the target class that you selected.

Note. For the bind field and target field, you can select an attribute different than the attribute for which you are creating the field drilldown. These values do not have to coincide. For example, you might create a field drilldown for the Period Name field, but pass in the period context attribute as the bind field for the target page, because the target class doesn't recognize the period name attribute. In this case, you would specify, for the Period Name field, *Period Context* in the Bind Field Name field and *Period Context* in the Target Field Name field.

Defining Row Transfers

Access the Row Transfer page.

Configurable UIO

Row Transfer

Link Name Payout Details

Description [Text Box]

Display Order 0 ☒ **Visible**

Drill Down Target Details

Display Type

☒ **Push Button** [Text Box]

☐ **Image** [Text Box]

☐ **Hyperlink** [Text Box]

Mouse Over Text Payout Details

Row Transfer page (1 of 2)

Show the following attributes on the details page:

List of Objects

Object ID

Fields		Customize	Find	View All	First	1-8 of 8	Last
Attributes	Label	Visible	Display Order				
1 PayoutRO - Context	Context	<input checked="" type="checkbox"/>	2				
2 PayoutRO - Payment Code	Payment Code	<input checked="" type="checkbox"/>	4				
3 PayoutRO - Payout Amount	Payout Amount	<input checked="" type="checkbox"/>	6				
4 PayoutRO - Period Begin Date	Period Begin Date	<input checked="" type="checkbox"/>	8				
5 PayoutRO - Period Context	Period Context	<input checked="" type="checkbox"/>	10				
6 PayoutRO - Period End Date	Period End Date	<input checked="" type="checkbox"/>	12				
7 PayoutRO - Period Name	Period Name	<input checked="" type="checkbox"/>	14				
8 PayoutRO - UOM	UOM	<input checked="" type="checkbox"/>	16				

[Show All](#) [Hide All](#) [Refresh](#)

* Required Field

[OK](#) [Cancel](#)

Row Transfer page (2 of 2)

Display Type

Push Button, Image, and Hyperlink

Select the type of row transfer link to create, either a link, image, or button. To use an image for the link, click the Details link and select the image on the Row Transfer page. To use a link or button, enter the text to appear.

List of Objects

Use this group box to select the fields to display on the details page for a selected object. When the system renders the details page for participants, it displays a grid of the visible fields for the selected object in the display order that you designate.

Object ID

Select the object to display fields for on the details page. The system populates the grid with all available attributes (fields) for the object that you select.

Attributes

Displays the attribute name for the selected object.

Refresh

Click this button to reload the fields of the query section into the grid. The system synchronizes the fields in the grid with the metadata for the query output fields, reloading only the changes that it detects.

Defining Section Transfers

Access the Section Transfer page.

Configurable UIO

Section Transfer

Link Name Payout History

Description

Display Order 10 ☒ **Visible**

Target Page Payout History

Text Payout History

* Required Field

OK Cancel

Section Transfer page

Target Page

Select the ID of the page that is the target of the section transfer. This is the page that the system displays for the participant when the participant clicks the section transfer link. You can only select from visible pages within the same configurable UIO, excluding the current page.

Text

Specify the actual text to display as a link for the section transfer.

Setting Chart Display Options

Access the Chart Display Option page.

Configurable UIO

Chart Display Option

Section Name

Payout Summary

Chart Type

Bar Chart

Label

PayoutRO

Payment Code

Value

PayoutRO

Payout Amount

Data Series

PayoutRO

Period Name

Chart Options

☒ Chart Title

Payout Summary

☒ X-Axis Title

Payout Code

☒ Y-Axis Title

Payout Amount

☒ Legend

☐ Top

☐ Bottom

☒ Right

☐ Left

* Required Field

OK

Cancel

Chart Display Option page (primary view)

Configurable UIO

Chart Display Option

Section Name

Chart Type

Label **Description**

Value **Payout Amount**

Chart Options

☒ **Chart Title**

☒ **Legend**

☒ **Top**

☐ **Bottom**

☐ **Right**

☐ **Left**

* Required Field

Chart Display Option page (pie chart view)

Key Attributes

Section Name

Enter a name of the section. The name that you entered on the Configurable UIO - Page page appears as the default value.

Chart Type

Select the type of chart to use for the section data. Select from:

- *Bar Chart*: Select to chart as vertical bars, with the label as the x-axis and the value as the y-axis.
- *Histogram*: Select to chart as a histogram, with the label as the x-axis and the value as the y-axis. A histogram looks like a bar graph, but there is one important difference. On a histogram, each bar stands for a group or range of values. Suppose test scores in a class range from 1 to 100. Instead of drawing a different bar for each score (possibly 100 bars), scores can be grouped together.
- *Horizontal Bar*: Select to chart the data as horizontal bars, with the label as the y-axis and the value as the x-axis.
- *Line*: Select to plot the data as a line, with the label as the x-axis and the value as the y-axis.
- *Pie Chart*: Select to chart the data as a pie, with the label as the name of each region and the value as the portion of each region.

Label	Select the object and attribute to use as the label for the chart. Select from objects and attributes that you have included in the body of the query section. These object attributes are derived from the source query.
Value	Select the object and attribute to use as the value for the chart. Select from objects and attributes that you have included in the body of the query section. These object attributes are derived from the source query.
Data Series	(Optional) Select a group of data to compare side-by-side as a further division of the label data. The system displays each set of data in the data series differently and explains the meaning of each in the chart legend. For example, you display a bar chart with <i>Participant</i> as the label, <i>Amount</i> as the value, and <i>payment code (bonus or commission)</i> as the data series. When the system renders this chart, it displays the participant names across the x-axis, with two bars for each participant—one bar representing bonus amounts and the other bar representing commission amounts.

Note. This field is not applicable to pie charts.

Chart Options

Chart Title	Select this check box to include a title for the chart, and enter the text to display for the title.
X-Axis Title and Y-Axis Title	Select these check boxes to have either an x-axis, y-axis, or both for the chart. If selected, enter the text to display for these axes.
Legend	Select this check box to include a legend for the chart, then select the position for the legend to appear— <i>Top</i> , <i>Bottom</i> , <i>Right</i> , or <i>Left</i> .
Data Labels	Select this check box to include data labels on the pie chart, then select how each data label should appear. Select from <i>Value</i> , <i>Percent</i> , <i>Label</i> , or <i>Percent and Label</i> .

Note. This field is for pie charts only.

Previewing Configurable UIO Pages

Access the Page Preview page.

Once you have defined a page for the configurable UIO, preview the layout of the page. The system opens a new browser window and, based on the page definition, displays what the page will look like when the participant accesses it through the participant UI associated with this UIO.

Associating UIOs with a Compensation Structure

After you have registered UIOs, the compensation administrator uses relationships to associate UIOs to participants and plan combinations on a compensation structure. The compensation administrator can also maintain and organize UIOs. For example, the compensation administrator can create a logical group of UIOs to associate to a specific type of participant.

See Also

[Chapter 13, “Working with Compensation Structures,” page 289](#)

[Chapter 20, “Managing the Participant Reporting Interfaces,” Creating UIO Groups, page 445](#)

[Chapter 20, “Managing the Participant Reporting Interfaces,” Maintaining UIOs, page 443](#)

Reviewing Delivered UIOs

The following table describes the UIO base and derived classes and UIO group-related classes delivered in the sample database:

Class ID	Object Type	Description	Use
UOBJ	Base	User Interaction Object	Parent base class object of the derived class objects for UIO pages (UOPG), UIO reports (UORP), and configurable UIOs (UODP).
UOPG	Derived	UIO - PIA Page	Object that defines and renders a PeopleSoft Pure Internet Architecture page, and is associated to a participant on a compensation structure.
UORP	Derived	UIO - Report	Object that defines and renders a report, and is associated to a participant on a compensation structure.

Class ID	Object Type	Description	Use
UODP	Derived	Configurable UIO	Object that is highly and easily configurable, query-based, and is associated to a participant on a compensation structure. The system uses this object in conjunction with the UIO definitions designed through the User Interaction - Configurable component to render participant UI pages. The system also utilizes the Query Builder API to access data.
UGRP	Derived	UIO Group	The parent object for UIO group objects. UIO group objects determine the dynamic construction of the participant's main My Sales Compensation page and save data entry time and effort.
UGPM	Derived	UIO Group Member	An object that can hold up to two levels of group members.
UGFM	Derived	UIO Grp Flat Members	An object that can hold flattened group hierarchies for use in tables. It contains the members of a UIO group during processing of a group, when the Group Flattener API is called during the engine run or from any page. This is a system data object.
UGGV	Derived	UIO Groups View	View that displays group information. This is a system data object.

See Also

Chapter 4, “Registering Base and Derived Classes,” page 77

Reviewing Delivered UIO Pages and Reports

The following types of web pages and reports are delivered in the sample database:

- UIO pages.
- UIO reports.
- Configurable UIOs.
- UIO group and group of groups information.
- UIO group of groups: UIO group and UI member information.

UIO Pages

The following table describes delivered UIO pages:

UIO Name	UIO ID	Market Template	Description
Compensation Snapshot	2000	HTI	Enables users to view their attainment and commission information, allocated and credited transactions, and pending payments.
Projected Compensation	3000	HTI	(Inactive) Enabled users to view their projected attainment and commission information, allocated and credited transactions, and pending payments.
Sales Force	4000	HTI	Enables users to view their sales force performance (attainment and commission, allocated and credited transactions, and pending payments) and plan summary.
General Problem Reporting	5000	Any	Enables users to report general problems. You can use this UIO with any product category and market template configuration.

UIO Name	UIO ID	Market Template	Description
Search Utility	6800	Any	<p>Enables users to search the database using predefined queries. This UIO is built on top of Query Builder to enable self service users to query incentive data with a straight forward, easy-to-use interface.</p> <p>You can use this UIO with any sales incentive management market template.</p>
Subordinate Plan Summary	6900	Any	<p>Enables managers to view plan summaries of their subordinates.</p> <p>You can use this UIO with any product category and market template configuration.</p>

UIO Reports

The following table describes delivered UIO reports:

UIO Name	UIO ID	Market Template	Process Name
Commission Statement (Sales Representative)	4500	HTI	EISIHCP0
Credits Report	4501	HTI	EISIHCR0
Sales Force Commission Statement	4502	HTI	EISIHCM0
Indirect Credits Report	4504	HTI	EISIHIC0
Manager Unpaid Credits Report	4505	HTI	EISIHUC0
Participant Unpaid Credits Report	4506	HTI	EISIHUCP

UIO Name	UIO ID	Market Template	Process Name
BCM Commission Statement	4507	BCM	EISIBCP0
BCM Manager Commission Statement	4508	BCM	EISIBCM0

Configurable UIOs

The following table lists delivered configurable UIOs:

UIO Name	UIO ID	Market Template	Description
Compensation Snapshot	6000	HTI	Summarizes a participant's incentive activity for a specified period.
BCM Compensation Snapshot	6002	BCM	Consolidates and reports the participant's compensation summary, high-level calculation details, and the BCM-specific transactions that the system processed and used to calculate the compensation.
Sales Force Snapshot	6500	HTI	Summarizes performance for all variables for a sales subordinate, so that managers can quickly assess their subordinate's achievements over time.
Compliance Review	7000	BCM	Shows details of compliance reviews including regulation, last reviewed date, and status.
Loans By Branch	7100	BCM	Shows the loan amount, cost of the loan, and net revenue that was achieved by each territory node for the month and loan type.

UIO Name	UIO ID	Market Template	Description
New Business Report	7200	BCM	Shows the new business generated for a given territory in a particular calendar period for each line of business (LOB).
Product Sales Report	7300	BCM	Shows product sales for each node in a territory according to product name and product type. Groups details by product.

UIO Group and Group of Group Information

The following table lists delivered UIO group information:

UIO Group	Group Name	Market Template	Description	Group of Groups
100000	Standard Manager Home Page	HTI	Standard manager main My Sales Compensation page.	Yes
20000	Compensation Snapshot	HTI	View attainment and commission information, allocated and credited transactions, and pending payments.	No
200000	Standard Non-Mgr Home Page	HTI	Standard non-manager main My Sales Compensation page.	Yes
20001	BCM Compensation Snapshot	BCM	View compensation summary, high-level calculation details, and the BCM-specific transactions that the system processed and used to calculate the compensation.	No

UIO Group	Group Name	Market Template	Description	Group of Groups
30000	Projected Snapshot	HTI	View projected attainment and commission information, allocated and credited transactions, and pending payments.	No
300000	Limited Participant Rptg (reporting)	HTI	Compensation snapshot and problem reporting only.	Yes
40000	Sales Force	HTI	View sales force performance (attainment and commission, allocated and credited transactions, and pending payments) and plan summary.	No
45000	Manager Reports	HTI	Access sales force reports, including credit and commission reports.	No
45001	Participant Reports	HTI	Access sales incentives reports, including credit and commission reports.	No
45002	Participant Reports	BCM	Access reports about your sales incentives, including credit and commission reports.	No
50000	Problem Reporting	Any	Report a problem about incentives, such as missing transactions or incorrect payout information.	No

UIO Group	Group Name	Market Template	Description	Group of Groups
68000	Search Utility	Any	Search for information related to incentive payments, such as transaction, product, and customer details.	No
70000	BCM Participant Reports	BCM	Access reports about your Compliance Review, Loans By Branch.	No

UIO Group of Groups: UIO Group and UI Member Information

The following table lists delivered group and member information for groups that contain groups:

UIO Group	Contains UIO Group or Member	Contains UI Members
100000 – Standard Manager Home Page	20000 - Compensation Snapshot	6000 - Compensation Snapshot
100000 – Standard Manager Home Page	40000 - Sales Force	6500 - Sales Force Snapshot 6900 - Subordinate Plan Summary
100000 – Standard Manager Home Page	45000 - Manager Reports	4501 - Credits Report 4502 - Sales Force Commission Stmt (statement) 4504 - Indirect Credits Report 4505 - Manager Unpaid Credits Report
100000 – Standard Manager Home Page	50000 - Problem Reporting	5000 - General Problem Reporting
100000 – Standard Manager Home Page	68000 - Search Utility	6800 - Search Utility
200000 – Standard Non-Mgr Home Page	20000 - Compensation Snapshot	6000 - Compensation Snapshot

UIO Group	Contains UIO Group or Member	Contains UI Members
200000 – Standard Non-Mgr Home Page	45001 - Participant Reports	4500 - Commission Statement 4501 - Credits Report 4506 - Participant Unpaid Credits Rpt (report)
200000 – Standard Non-Mgr Home Page	50000 - Problem Reporting	5000 - General Problem Reporting
200000 – Standard Non-Mgr Home Page	68000 - Search Utility	6800 - Search Utility
300000 – Limited Participant Rptg (reporting)	20000 - Compensation Snapshot	6000 - Compensation Snapshot
300000 – Limited Participant Rptg (reporting)	50000 - Problem Reporting	5000 - General Problem Reporting

See Also

Chapter 20, “Managing the Participant Reporting Interfaces,” page 439

Appendix A, “Sales Incentive Management Reports,” Sales Incentive Management Reports: A to Z, page 467

CHAPTER 6

Setting Up Security

This chapter provides an overview of Sales Incentive Management security and discusses how to:

- Define Sales Incentive Management roles.
- Import existing security information.
- Set up general PeopleTools security.
- Define compensation administrator security access.
- Define participant security access.

Understanding Sales Incentive Management Security

Sales Incentive Management enables you to efficiently secure data and functionality within the product. Sales Incentive Management security is designed to accept security definitions imported from certain external systems, such as PeopleSoft Enterprise Customer Relationship Management and PeopleSoft Enterprise Human Capital Management applications, preserving both the security definition and their hierarchal order. Once you have imported security definitions and defined the various types of security access, you run the Security Application Engine process to activate security for the system. These processes create the output tables that store the security definitions. These security definitions are then used by the system to grant security access to all system users (system administrators, compensation administrators, and participants).

For system administrators, setting up SIM security is very general and encompasses two areas of security. The system administrator defines global access privileges for all users to access the Sales Incentive Management system and also defines compensation administrator access privileges to compensation structures.

Compensation administrators define security to a very granular level while building the compensation structure. Generally they also define security for the compensation structure and they run the Security Application Engine process.

Sales Incentive Management provides three different types of security:

Security Type	Description
General PeopleTools security	Enables access to the Sales Incentive Management application. You must configure general PeopleTools security for all Sales Incentive management users (administrators and participants).

Security Type	Description
Compensation Administrator security	Defines accessible business units and setIDs for a specific individual (user ID). This controls which SIM objects and compensation structures they can access.
Participant (or “row-level”) security definitions	<p>Defines security access through an access relationship or participant relationship on a compensation structure. You can import security definitions from territory tree structures in PeopleSoft Enterprise Customer Relationship Management applications and organization tree structures in PeopleSoft Enterprise Human Capital Management applications.</p> <p>Row-level security also includes any access relationship objects. After importing the existing security definitions into a compensation structure, you can define additional security by defining access relationships on the compensation structure.</p>

During security processing of a compensation structure, the Security Application Engine process creates security definitions and writes them to the security output tables. The system queries these security definitions in the tables before granting access to participant information. The primary security output table is the EI_SECURITY_TBL. It contains the final, effective-dated security definitions created from the Security Application Engine process. The Participant User Interface functionality references this table to grant access to specific reporting information defined for a particular participant.

Security definitions also store the security information used by the system in security contexts and in queries for security objects. Contexts group transactions and processing results to the compensation structure, compensation node, plan, participant, period, and run context under which they were generated. Security contexts are created when a user defines a node on the compensation structure and associates an incentive plan containing participants to that node. As long as the compensation objects used to create the security context stay in their original position in the structure hierarchy, the system maintains the security context as active.

You will also need to establish security for the Ascential extract, transform, and load (ETL) tool. This is described later in the Loading Data chapter.

See Also

[Chapter 13, “Working with Compensation Structures,” page 289](#)

[Chapter 9, “Loading Data,” page 193](#)

Defining Sales Incentive Management Roles

To define Sales Incentive Management roles, use the Roles (EI_EI_ROLE_TBL) component. Use the EI_ROLE_CI component interface to load data into the tables for this component.

This section provides an overview of roles and discusses how to define them.

Understanding Roles

Prior to setting up security for your Sales Incentive Management system, you must establish Sales Incentive Management (SIM) roles for all users. In PeopleSoft Enterprise applications, PeopleTools roles help secure your system by restricting access to sensitive data and define PeopleSoft workflow routings. Role-based security enables users with certain assigned roles to access specific rows of data that are controlled by key fields. SIM roles extend the characteristics of the PeopleTools roles to include the following sales incentive management security-related attributes:

- **Access rights:** Roles control which nodes a participant can access to view compensation information (the participant's node only, child nodes only, or both). This enables managers to traverse the tree hierarchy of their subordinates. (Note that standard PeopleSoft PeopleTools security role-based access determines which system pages a participant can access. For example, the roles assigned to compensation administrators, sales managers, and sales reps ensures that the pages they can view are suited to their task responsibilities.)

When a new participant is added to a compensation structure, the participant is attached to a node by using a relationship type, either Participant or Access, which is assigned a SIM role. When the security process is run for the first time for the participant, they inherit the Sales Incentive Management role that is assigned to the relationship type.

- **Update and approval privileges:** Roles control the operations that a participant can perform on data; for example, an assigned role may enable a participant to update another participant's transaction, approve the transaction, or both. In addition, SIM roles are mapped to PeopleTools Security Roles for workflow notification.
- **Rollups:** Roles are referenced by incentive plan rules to determine where transaction rollups should occur.

Note. Role security only exists within a compensation structure; that is, if a compensation structure is connected to other structures, role security does not extend to the subordinate compensation structures.

The privileges and defaults specified for a role control the abilities of participants associated with that role. For example, the role default View Others on Same Node enables participants to view sales transaction information for other participants (of any role) on the same compensation structure node. The View Children Nodes default enables a participant to only view information for participants of any role on child nodes (those below the participant's node in the hierarchy). Note that participants can always see their own information, regardless of what security that have been given in a role.

Sales Incentive Management enables you to import existing security and role definitions from source systems. The imported role definitions are mapped to the Sales Incentive Management roles you have defined.

See Also

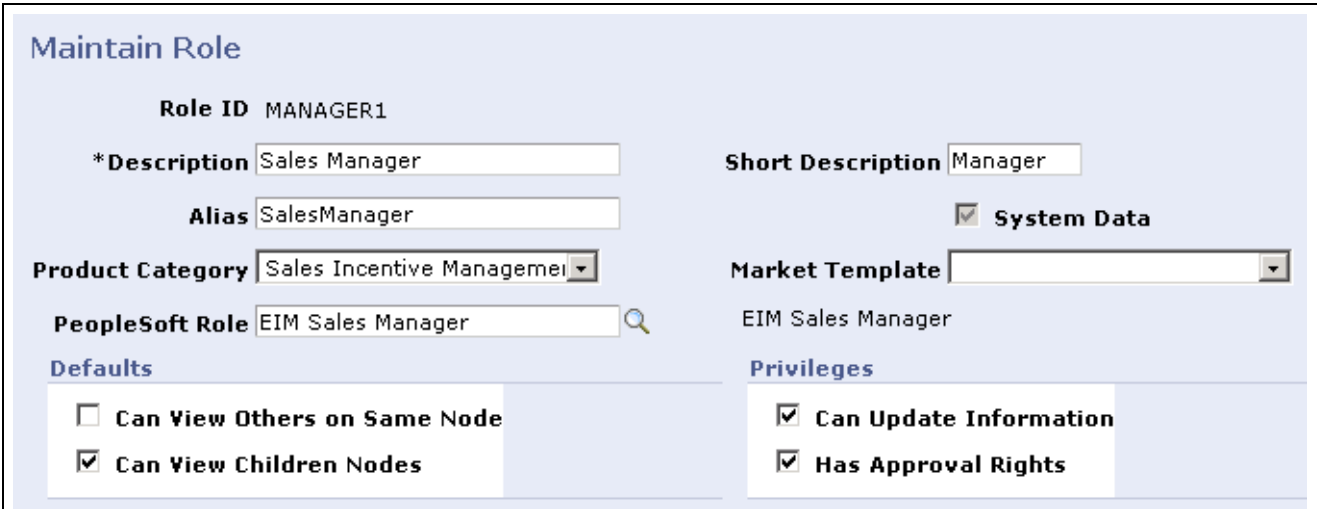
[Chapter 13, "Working with Compensation Structures," page 289](#)

Page Used to Define Sales Incentive Management Roles

Page Name	Object Name	Navigation	Usage
Maintain Role	EI_EI_ROLE_TBL	Compensation, Sales Incentives, Define Sales Incentive Options, Roles, Maintain Role	Define SIM roles.

Setting Up Roles

Access the Maintain Role page.



Maintain Role

Role ID MANAGER1

***Description** Sales Manager

Alias SalesManager

Product Category Sales Incentive Management

PeopleSoft Role EIM Sales Manager

Short Description Manager

☒ **System Data**

Market Template

Defaults

☐ **Can View Others on Same Node**

☒ **Can View Children Nodes**

Privileges

☒ **Can Update Information**

☒ **Has Approval Rights**

Maintain Role page

Alias	Enter the syntax to use for the role ID when using it within incentive plan rules. For example, you would use the alias when writing using the Rollup formula in an incentive plan rule. The system ensures that the alias for each role has unique syntax so that it can be used in the incentive plan rules.
Product Category	Select a product category for the role ID to limit use of the role to that specific product category. Currently the <i>Sales Incentive Management</i> product category is the only available option.
Market Template	If you select a product category, you can then select a market template within that product category to limit use of the role to that specific market template. Current market templates are <i>Banking & Capital Markets</i> and <i>High Tech & Industrial</i> , both of which are part of Sales Incentive Management.
System Data	The system automatically selects this check box if the role is delivered by PeopleSoft.
PeopleSoft Role	To enable Workflow for the role ID, specify a PeopleTools PeopleSoft role.
Can View Others on Same Node	<p>If selected, enables participants assigned this role to view information for other participants the same node. This setting can be overwritten when creating a compensation structure.</p> <p>See Chapter 13, “Working with Compensation Structures,” Associating Reference and Participant Objects with Nodes, page 298.</p>
Can View Children Nodes	<p>If selected, enables participants assigned this role to view information for participants on child nodes (nodes located below this node in the hierarchy). This setting can be overwritten when creating a compensation structure.</p> <p>See Chapter 13, “Working with Compensation Structures,” Associating Reference and Participant Objects with Nodes, page 298.</p>
Can Update Information	If selected, enables participants assigned this role to update information for others according to the defined role Defaults.. This is used by workflow.
Has Approval Rights	If selected, gives participants assigned this role workflow approval rights for other participants according to the defined role Defaults. This is used by workflow.

Importing Existing Security Information

Sales Incentive Management uses existing security definition data that resides in your PeopleSoft Enterprise Human Capital Management and PeopleSoft Enterprise Customer Relationship Management databases.

Sales Incentive Management delivers predefined Extract, Transform, and Load (ETL) maps to automatically transfer most of your security definition data from these databases (source) into your Sales Incentive Management database staging tables (target) using Ascential DataStage software. For example, you can transfer security definitions from a PeopleSoft Enterprise Human Resources department tree. If you want to use non-PeopleSoft sources or make changes to the maps to meet your business requirements, you will need to reconfigure the delivered maps using the Ascential DataStage tool.

To perform the security definition transfer process:

1. Import security definitions from the source system directly to the SIM staging tables using ETL maps.
You should perform these ETL map processes whenever the source system changes its data and you want your Sales Incentive Management system to reflect these changes.
2. Transfer security definitions from SIM staging tables to SIM production tables, specifically, the compensation structure tables.
3. Run the EI_SECUR Process Scheduler job, which you execute using the delivered step definition called SECURITY in a job definition, to create the effective-dated security definitions and write them to the security table (EI_SECURITY_TBL).

To run the EI_SECUR Process Schedule job, you must select a compensation structure and plan template on the Comp Structure and Plan Criteria page when defining the job definition. This associates a calendar ID with the job and enables it to run successfully.

The system subsequently uses the security definitions to grant participants security access for participants.

Important! After importing security definition information, confirm that the User ID field on the Maintain Sales Person page is populated with a user ID for each participant. Each sales participant needs a unique user ID to access their incentive results through the participant UI. If there is no user ID, you *must* enter this information.

If you do not have a source system for your security, you can define security directly in Sales Incentive Management on a compensation structure.

Note. If you are importing security definitions from non-PeopleSoft products, such as third-party products or your organization's legacy systems, you must develop the mapping functionality to import the data from your system into Sales Incentive Management staging tables or production tables.

See Also

[Chapter 3, “Defining Sales Incentive Management General Options,” Configuring Load Definitions, page 49](#)

[Chapter 10, “Managing Reference and Participant Objects,” page 211](#)

[Chapter 9, “Loading Data,” page 193](#)

Setting Up General PeopleTools Security

The first level of security in Sales Incentive Management is PeopleTools security using permission lists, roles, and user IDs. You use PeopleTools security to define Sales Incentive Management security access privileges for all users—administrators and participants—to access pages, menus, and queries. Sales Incentive Management delivers samples of PeopleTools security.

The user profile that you create for each individual who accesses your Sales Incentive Management application determines the pages that the user can access. You create user profiles with the PeopleTools User Profiles component. You assign a role to each user profile and you link roles to permission lists. Each permission list identifies the pages that individuals assigned to a role can access. To modify the access for specific pages for each role, you modify the permission list for the user's role.

Note. If you modify a permission list, you change the access for all users who are assigned to roles to which the permission list is linked.

You must perform several tasks to enable system administrators, compensation administrators, and participants to use Sales Incentive Management pages.

To define security access for all Sales Incentive Management users:

1. Create separate permission lists for system administrators, compensation administrators, and participants using the Permission Lists component.

Sales Incentive Management delivers the following SIM permission lists in the sample data, on which you can base your organization's permission lists:

Permission List	Description	Comments
IMIM2000	Query Builder	Contains components belonging to the Query Builder tool.
IMSI1000	Compensation Administration	Contains all functional components for incentive administration regardless of market template.
IMSI1001	Compensation Admin (HTI)	Contains all functional components for the High Tech & Industrial market template.
IMSI1002	Compensation Admin (BCM)	Contains all functional components for the Banking & Capital Markets market template.
IMSI1200	Incentive Configuration	Contains all technical components for incentive administration regardless of market template.
IMSI1400	Sales Participant	Contains all participant UI framework components regardless of market template, including those at the SIM and EIM levels.

Permission List	Description	Comments
IMSI1401	Sales Participant - HTI	Contains all participant components for the High Tech & Industrial market template.
IMSI1402	Sales Participant - BCM	Contains all participant components for the Banking & Capital Markets market template.

Note. To give users access to Query Builder, you must also select the Query Access check box on the PeopleTools tab of your Sales Incentive Management permission lists. This enables access to PeopleSoft Query, which is the foundation of Query Builder. In addition, you must use the Query tab of your Sales Incentive Management permission list to give your users access group permissions. This enables authorized users to access Sales Incentive Management tables when running a query.

2. Create separate roles for system administrators, compensation administrators, and participants using the Roles component.

Assigning roles to Sales Incentive Management users is generally a one-time setup, unless a users' role changes (for example, from a Sales Participant to a Sales Manager), or when you need to add new users.

Use the following roles in the sample database as examples:

- Incentive System Administrator
- Compensation Administrator
- BCM Compensation Administrator
- HTI Compensation Administrator
- SIM Sales Manager
- SIM Sales Participant
- BCM Sales Manager
- HTI Sales Manager
- BCM Sales Participant
- HTI Sales Participant

3. Create unique Sales Incentive Management user IDs for each participant, and map them to PeopleTools role IDs using the User Profile component.

This enables the system to recognize and grant access to SIM users. You need to perform this step when you initially implement Sales Incentive Management for your organization, and each time you add new users to the Sales Incentive Management system. Use the following Sales Incentive Management user IDs in the sample database as examples:

- SIM1, Incentive System Administrator
- SIM2, Incentive Compensation Administrator
- SIM3, Incentive Compensation IT
- HTI1, Incentive System Administrator
- HTI2, Incentive Compensation Administrator
- HTI3, Incentive Compensation IT

- BCM1, Incentive System Administrator
- BCM2, Incentive Compensation Administrator
- BCM3, Incentive Compensation IT
- SLSREP, EIM Sales Participant
- SLSMGR, EIM Sales Manager
- BCMSLSREP, BCM Sales Participant
- HTISLSREP, HTI Sales Participant
- BCMSLSMGR, BCM Sales Manager
- HTISLSMGR, HTI Sales Manager

4. Review delivered query access to the Query Tree.

The delivered Sales Incentive Management Query Tree (EQRY_Tree, Query Access Manager component) in the sample database contains all the records from which a user can access data. The delivered permission list Query Builder (IMIM2000) is defined to grant access to the top node (EIM_ALL) of the Query Tree. This means that any user of a role defined with the Expression Builder permission list has access to query the entire Sales Incentive Management application. Sales Incentive Management delivers the Compensation Administrator and IT System Administrator roles predefined with the Expression Builder permission list. If you want to limit access to the Query Tree, you must create new roles and permission lists.

The Sales Incentive Management Query Tree also has a special node or access group, Participant Reports (EIM_PARTICIPANT_RPTS). Unlike administrators, participants only require access to view participant UI pages, generate participant reports, and use the Participant Search utility (the queries behind the search utility need access to certain objects which are defined in this access group). This access group enables you to give participants this limited access. Sales Incentive Management delivers the IMSI1400 permission list predefined with this access group. To view this definition:

- a. Navigate to the Permission List component for IMSI1400, and select the Query tab.
- b. Click the Access Group Permissions link.
- c. The Permission Lists Access Groups page is defined with *EQRY_TREE* and *QUERY_TREE_SIM* Tree Name and *EIM_PARTICIPANT_RPTS* Access Group.

Important! There are two steps to assigning security for participants. The first step, assigning PeopleTools security (roles attached to permission lists), only grants the participant access to the page (or pages) defined on the permission list. The second step is the compensation administrator associating user interaction objects (UIOs) to the participant on a compensation structure. The participant relationship in the compensation structure that relates the participants, node, plan together with UIOs define what UIOs participants has access to.

See Also

Enterprise PeopleTools PeopleBook: Security Administration

Chapter 13, “Working with Compensation Structures,” page 289

Chapter 6, “Setting Up Security,” Defining Participant Security Access, page 148

Defining Compensation Administrator Security Access

To define compensation administrator security access, use the Business Unit/SetID component (EI_BU_COMPADMIN).

This section provides an overview of compensation administrator security access and discusses how to define it.

Understanding Compensation Administrator Security Access

In addition to having general access to the Sales Incentive Management application, your compensation administrators need access to manage compensation structures. You control access to compensation structures by defining business unit and setID security by user ID. You then assign these user IDs to your compensation administrators, depending on what business units and setIDs they require access. When compensation administrators and any other individuals that need compensation structure access log in to the system with a particular user ID, they can only access data associated with the business units and setIDs defined for their user ID. As compensation structures are associated with a single business unit at the root node level, assigning unique access to each of your user IDs adds a layer of security. It ensures that to access a specific compensation structure, a compensation administrator or user must be using a specific user ID.

Business unit and setID security settings also affect the results from the Query Builder tool. Administrators can only query on data to which they have access, and only during the period they have security access.

Page Used to Define Compensation Administrator Security Access

Page Name	Object Name	Navigation	Usage
Business Unit and SetID Security	EI_BU_COMPADMIN	Compensation, Sales Incentives, Define Sales Incentive Options, Business Unit/SetID Security, Business Unit and SetID Security	Define and maintain access to business units and setIDs for a specific user ID.

Defining Compensation Administrator Security Access

Access the Business Unit and SetID Security page.

Business Unit and SetID Security

User ID SIM1

Business Unit Details Customize Find View All First 1-3 of 7 Last

	*Business Unit	Description		
1	CORP1	Corporation 1	+	-
2	GBIBU	GBIBU	+	-
3	US001	US001 NEW YORK OPERATIONS	+	-

SetID Details Customize Find View All First 1-2 of 2 Last

	*SetID	Description		
1	MODEL	Standard SETID	+	-
2	SHARE	Demo setid	+	-

Business Unit and SetID Security page

Specify in the Business Unit and SetID fields the business units and set IDs for which the particular user ID has access.

Defining Participant Security Access

This section discusses how to:

- Define participant security.
- Process participant security setup definitions.
- Maintain the security structure for participants.
- Create security for new participants.

Defining Participant Security

Participant Security is derived from the relationships on the compensation structure. You need to define a compensation structure on which to base security by setting a property on the root node of a tree structure. To do this, select the Use for Security Groups check box on the root (top) node of a compensation structure. You may use multiple compensation structures to define security. If you do so, the results are additive.

Use the Maintain Territory page to review the connection between a participant relationship and a compensation structure. A participant relationship has a list of participants, the plan ID, and the UIO (user interaction objects). So, whatever is defined on this participant relationship (the list of UIO pages and reports) determines what the participant sees on the participant UI. If there are no UIOs assigned, the participant won't see any pages or reports.

See Also

[Chapter 13, "Working with Compensation Structures," Compensation Structure Security, page 293](#)

Processing Participant Security Setup Definitions

Running the security engine (EI_SECURITY) creates and writes the effective-dated security definitions to the security record (EI_SECURITY_TBL). These definitions are used by the system to determine security access for participants.

To run security, you need to include security as a step in a Sales Incentive Management job run, or in its own job run.

Sales Incentive Management includes the following predefined security processing information in the sample database:

- SECURITY Step Definition.
- EI_SECUR Process Scheduler Job, which is executed by the SECURITY Step.
- EI_SECURITY Application Engine Process program, which is called by the EI_SECUR Process Scheduler Job.

See Also

[Chapter 7, “Setting Up Engine Processing,” page 151](#)

[Chapter 18, “Processing Incentive Transactions,” page 367](#)

Maintaining the Security Structure for Participants

To maintain Sales Incentive Management security structure for participants, rerun the import processes for security definitions and trees as often as the source system changes data. You want to see these changes reflected in your SIM data. Or, manually update the compensation structure participant and access relationships. This ensures that your compensation structure reflects the security definitions needed for your participants. Then run the SIM Security Step (SECURITY) to update the security definitions and security output tables with the modified security information.

For integrity of compensation structure security, confirm with your compensation administrators that they have modified existing objects and added new objects (with the appropriate security attributes) to compensation structures as personnel changes happen.

Creating Security for New Participants

To implement security for new participants you need to:

- Confirm that the participant has an assigned user ID in PeopleTools User Profile (map the User Profile to an existing PeopleTools security role).
- Confirm that the participant’s user ID is defined on the Maintain Sales Person (EI_SI_PARTICIPANT) page.
- Confirm that the participant is assigned to a compensation structure node (territory) through a participant relationship.
- Run the Security Application Engine process (the SIM Process Scheduler Job EI_SECUR) to update the security definitions and security output tables with the new participant information.

Once you have completed these setup security tasks for new participants, a compensation administrator can create and add any objects (with the appropriate security attributes) to a compensation structure for new participants.

CHAPTER 7

Setting Up Engine Processing

This chapter provides an overview of engine processes and discusses how to:

- Define staging parameters.
- Configure load definitions.
- Specify engine rollback definitions.
- Define process steps.
- Review delivered SIM job definition data.

Understanding Engine Processing

Depending on the type of Sales Incentive Management process step you are defining, processing SIM jobs is a six or seven step process involving the following steps:

1. Define a PeopleTools Process Scheduler Process.
(PeopleSoft delivers the Process Scheduler process definitions that you use in Sales Incentive Management processing.)
2. Define a PeopleTools Process Scheduler Job.
(PeopleSoft delivers the Process Scheduler jobs that you use in Sales Incentive Management processing.)
3. (Optional) Specify data staging definitions, data load definitions, or engine rollback definitions.
4. Create a SIM process step.
5. Create a SIM job definition.
6. Schedule a SIM job run for automatic or ad hoc processing.
7. Monitor the SIM job run.

This PeopleBook discusses steps 5 through 7 in the chapters listed in the *See Also* section.

Sales Incentive Management engines work in tandem with the PeopleTools Process Scheduler functionality. In the Process Scheduler, *processes* and *jobs* are used to define processes and the engines that run those processes. When you run a SIM Job, the Sales Incentive Management engine (or engines, if multiple engines are defined for a SIM job) invokes the associated Process Scheduler Job engines.

To minimize your implementation of SIM job runs, Sales Incentive Management delivers pre-configured Process Scheduler processes and jobs for Sales Incentive Management, in addition to pre-configured process steps and job definitions. Also, if you are implementing a specific market template, its processes and incentive plans are designed to work with the delivered SIM processes, steps, and jobs. Though the delivered functionality should cover most organization's incentive plan processing needs, you may have to create and add customized process steps to a job definition to reflect your organization's particular business processes. You also need to create customized process steps if you develop a new incentive plan and do not use the delivered process steps for the new plan.

Use the Step Definition page to define a step ID for incentive plan processing, specifying all characteristics a step and associating a job ID (this job ID is a PeopleTools Process Scheduler Job "Job Name"). You also define steps that load transaction data or roll back engine processes on this page.

Remember that though step IDs can only have one job ID, the job ID (again, the Process Scheduler job) may contain multiple PeopleTools Process Scheduler engines. For example, the SIM step *COMMISSION* includes the Process Scheduler job *EI_CALC*, and *EI_CALC* contains two processes: *EI_ENGINE* and *EI_MASTER*.

Once you have defined your processing steps, you then use the Define Jobs page, adding as many step IDs as are necessary to define the job ID. (Note that the Job ID field on this page is different from the Job ID field on the Step ID page). As multiple step IDs can be included in a job ID, and as Process Scheduler job IDs for a step ID can be related to multiple engines, when a job is run, it can be communicating with multiple engines during the course of the run. In fact, it can be communicating with multiple engines at each processing step. This is discussed in the chapter "Processing Sales Incentives."

You use this procedure to define a number of obvious plan processing steps and not so obvious steps for the engine: Allocation, Credit, Reporting Engines, Data Loading, Context, Security, Channel.

See Also

[Chapter 9, "Loading Data," page 193](#)

[Chapter 18, "Processing Incentive Transactions," page 367](#)

Defining Staging Definition Parameters

To define staging parameters, use the Define Staging Parameters component (EI_ODS_TO_EIM).

This section discusses how to define staging parameters.

Page Used to Define Staging Parameters

Page Name	Object Name	Navigation	Usage
Define Staging Parameters	EI_ODS_TO_EIM_STG	Compensation, Sales Incentives, Define Sales Incentive Options, Define Staging Parameters, Define Staging Parameters	Define the parameters for loading compensation tree data from PeopleTools tree tables to SIM staging tables. You'll use these staging definitions on the Step Definition page when creating step IDs that load tree data into staging tables.

Defining Staging Definitions

Access the Define Staging Parameters page.

Define Staging Parameters

Staging Definition TREE

***Description** Comp Structure Tree

Load Type Tree

Load

SetID SHARE

Business Unit GBIBU

Source Tree GBIBU

Target Comp Structure

Define Staging Parameters page

The system displays the staging definition name, a load type of tree, and a target of compensation structure. Staging definitions are associated with step definitions on the Step Definition page when you are defining a step definition for a staging data load of a compensation structure tree. Enter a description.

SetID	Select the setID of the compensation structure tree that you want to load. The system prompts from the PSTREEDEFN table. The load process has certain logical dependencies. First, you <i>must</i> load tree structure data before loading compensation object data. This enables you to view compensation structure information on the Maintain Compensation Structure page.
Business Unit	Select the business unit for the tree that you want to load. The business unit is the set of control value for the tree. The system prompts from the PSTREEDEFN table.
Source Tree	Select the name of the compensation structure tree that you want to load.

Configuring Load Definitions

To configure load definitions, use the Configure Load Steps component (EI_OBJSTEP_DEFN).

This section discusses how to:

- Configure load definitions.
- Review delivered load definitions.

Page Used to Configure Load Definitions

Page Name	Object Name	Navigation	Usage
Configure Load Steps	EI_OBJSTEP_DEFN	Compensation, Sales Incentives, Define Sales Incentive Options, Configure Load Steps, Configure Load Steps	Define load definitions, including their object type and load order. You assign load definitions to step definitions on the Step Definition page when creating step definitions that load data from SIM staging tables to SIM production tables.

Defining Load Definitions

Access the Configure Load Steps page.

Configure Load Steps

Load Definition ACCOUNT

***Description** Account

Short Description Account

Product Category Sales Incentive Management

Market Template Banking & Capital Markets

☒ **System Data**

Object Details Customize Find

*Object Type	*Load Order
Account Staging	1

First 1 of 1 Last

Configure Load Steps page

General Fields

Description and Short Description

Enter a description and short description for the load definition. The system displays this description on various processing pages to identify the load definition. The system by default populates the Short Description field with the first 10 text characters entered from the Description field.

Object Details

For a load definition, specify all object details.

The load process has certain logical dependencies. First, you *must* load tree structure data before loading compensation object data. This enables you to view compensation structure information on the Maintain Compensation Structure page. With the tree structure data loaded first, the system can determine where to place the compensation objects on a particular structure. Without the initial load of tree structure data, the system cannot build and display a compensation structure with compensation objects.

Second, the load process also has certain logical dependencies for compensation structure, participant group, and reference group objects. These objects need to be loaded in a specific logical hierarchy. If you are processing participant group data, you must first load participant data. If you are processing reference group member data, you must first load reference group data to process Reference Group Members (Individuals) and Reference Group Members (Groups).

As an example, the delivered *COMPOBJECTS* load definition includes these compensation objects to be loaded in this load order:

1. *CS Business Unit Comp Node*
2. *CS Territory Comp Node*
3. *CS Participant Relationship*
4. *CS Reference Relationship*
5. *CS Participant*
6. *CS Reference Objects*

Sales Incentive Management defines load order for compensation structures, participant groups, and reference group objects in the sample data.

Object Type

Specify the type of object included in this load definition.

Load Order

You can include multiple object types in a definition. Rows that you add in the Object Details grid are automatically sequentially numbered, but you should edit this field and specify your preferred object load order, based on dependencies in the data load.

Note. You cannot have two rows with the same load order number.

Reviewing Delivered Load Definitions

Sales Incentive Management delivers the following predefined load definitions:

Load Definition	Description
Reference Objects	
Note. You must load the individual object load definition before loading the grouped object load definition. For example, you must first load PARTICIPANT before PARTGROUPS.	
ACCOUNT	Loads account objects.
BANKCUSTOMER	Loads banking customers.
BANKPRODUCT	Loads banking products.
BROKERLICENSES	Loads broker licenses.
CHANNEL	Loads channel objects.

Load Definition	Description
CUSTOMER	Loads customer objects.
GEOGRAPHY	Loads geography objects.
INDUSTRY	Loads industry objects.
PACKAGE	Loads package objects.
PARTICIPANT	Loads participant objects.
PRODUCT	Loads product objects.
WORKHOURS	Loads work hours objects.
ACCOUNTGROUP	Loads account groups.
PARTGROUPS	Loads participant groups.
REFGROUPS	Loads reference groups. Reference groups are groups of reference objects.
Variable Objects	
VARIABLES	Loads variable overrides.
Role Objects	
ROLE	Loads roles.
Compensation Structure Objects Important! You must load TREE data prior to loading COMPOBJECTS data to view compensation structure information on the Maintain Compensation Structure page.	
TREE	Loads tree structures.
COMPOBJECTS	Loads all compensation structure objects.

Specifying Engine Rollback Definitions

To specify engine rollback definitions, use the Rollback Groups (EI_ROL_GRP_DFN) and Rollback Definitions (EI_ROLLBACK_DFN) components.

This section provides an overview of engine rollback definitions and discusses how to:

- Define engine rollback groups.
- Create engine rollback definitions.

Understanding Engine Rollback Definitions

The Rollback Application Engine program (EI_ROLLBACK) enables you to reverse or undo any transactional processing, enabling you to undo entire runs or the most current run. If you want to rollback a job that includes ledger transactions, this functionality erases all traces of a transactions processing in the system, so that you can rerun the process without errors. The EIM Rollback Application Engine program operates by communicating with the process that posts to the SIM Ledger. When the rollback message is received, the EIM Ledger Posting Process posts a reversing transaction (or transactions) for those transactions that have already been posted.

You use rollback definitions to configure step definitions on the Step Definition page and job definition on the Define Jobs page with rollback functionality. Sales Incentive Management delivers rollback definitions. If necessary, you can create multiple rollback definitions, and group these definitions in multiple configurations, to suit your business needs. For example, you can create a rollback definition that reverses only the Reporting Engines processing, and another definition that reverses the entire engine process including the Reporting Engines.

Transaction Object Types that can be rolled back must have run context attributes to be included in a rollback definition and rollback group definition. The rollback definition search results pages are designed to retrieve and display only valid object types for your use.

If a job run is configured with a rollback step, the EIM Rollback Application Engine program resets the logic and deletes the data for each Object Type (as required by each Object Type). If the Object Type is a base class, the engine reverses the data for that base class object type and any affected derived class object types of the base class.

Use the Rollback Group and Rollback Definition pages to specify object types for transactions you want the Rollback Application Engine program to reverse on the SIM ledger.

The scope of the rollback is determined by where you run the job run from.

- If a rollback is included as a processing step in a job definition on the Define Jobs page, or if the rollback is performed from the Monitor Jobs page, it applies only to a single run context.
- If the rollback is performed from the Job Run History page (EI_PCM_JRUNVW), the rollback applies to all runs in a given period.

When reversing transactions for a period, you need to perform a *complete rollback* to wipe out all the runs.

See Also

[Chapter 7, “Setting Up Engine Processing,” Defining Process Steps, page 159](#)

[Chapter 18, “Processing Incentive Transactions,” Defining Jobs, page 372](#)

Pages Used to Specify Engine Rollback Definitions

Page Name	Object Name	Navigation	Usage
Rollback Groups	EI_ROL_GRP_DFN	Compensation, Sales Incentives, Define Sales Incentive Options, Rollback Groups, Rollback Groups	Define the object types included in a rollback group definition.
Rollback Definitions	EI_ROLLBACK_DFN	Compensation, Sales Incentives, Define Sales Incentive Options, Rollback Definitions, Rollback Definitions	Specify the scope and Group IDs included in an engine rollback definition.

Defining Engine Rollback Groups

Access the Rollback Groups page.

The screenshot shows the 'Rollback Groups' page. At the top, there are fields for 'SetID' (value: SHARE) and 'Product Category' (dropdown). Below these are 'Rollback Group ID' (value: RAW_TRANSACTIONS) and 'Market Template' (dropdown). A text field for '*Description' contains 'Raw Transactions'. To the right, there is a checkbox labeled 'System Data' which is checked. Below these fields is a table with columns 'Object Type', '+', and '-'. The table contains three rows of object types: '1 Stage Opportunity', '2 Staging Order Transaction', and '3 Staging Performance Metric Txn'. Above the table, there are navigation links: 'Customize', 'Find', 'View All', and a grid icon. To the right of the table, there are pagination controls: 'First', '1-3 of 3', and 'Last'.

Rollback Groups page

Select from the list of valid values the object types to include in the rollback group. A valid object type for rollback is one that contains run context attributes. The system displays only derived objects with a base class or derived objects without a base class, not base objects. This is to ensure that data is reset for both the derived objects and their parent base object because you do not want the system to rollback the only base object transactions.

Creating Engine Rollback Definitions

Access the Rollback Definitions page.

Rollback Definitions page

Modified transactions

Select to include modified transactions in the scope of the rollback definition. Modified transactions are those which have been updated by a user versus those updated by an engine (designated by MODIFIED_FLG on EI_TO_BASE_TBL).

Manually added transactions

Select to include manually added transactions in the scope of the rollback definition. Manually added transactions are those which have been entered by a user versus created by an engine (designated by ADDED_BY_UI_FLG on EI_TO_BASE_TBL).

Rollback Group ID

Select one or more rollback groups to identify the objects to be rolled back when using this rollback definitions.

See Also

[Chapter 7, “Setting Up Engine Processing,” Defining Engine Rollback Groups, page 158](#)

Defining Process Steps

To define process steps, use the Step Definition component (EI_PROCSTEP_DFN).

This section provides an overview of process step definitions, lists prerequisites, and discusses how to define process steps.

Understanding Process Step Definitions

You can define three types of process steps on this page:

- Steps used in processing incentive plans.
- Steps used to load transactional data and reference data.
- Steps used to specify engine rollback definitions.

Once you have defined your process steps, you use them on the Define Jobs page to create job IDs.

See Also

Chapter 18, “Processing Incentive Transactions,” Defining Jobs, page 372

Prerequisites

Prior to defining process steps you must do the following:

- Set up transaction processing step definitions.
- If the purpose of the step definition is to load data, you must first create data load definitions.
- If the purpose of the step definition is to perform a rollback, you must first create rollback definitions.

See Also

Chapter 9, “Loading Data,” Loading Reference and Participant Data from Staging Tables to Production Tables, page 202

Chapter 3, “Defining Sales Incentive Management General Options,” Defining Transaction Processing States, page 46

Page Used to Define Process Step Definitions

Page Name	Object Name	Navigation	Usage
Step Definition	EI_PROCSTEP_DFN	Compensation, Sales Incentives, Define Sales Incentive Options, Step Definition, Step Definition	Define process steps and their details, such as step order and step dependency. You use step definitions in on the Job Definition page to process SIM jobs.

Defining Process Steps

Access the Step Definition page.

Step Definition

SetID

SHARE

Step ID

LD_GEO

Job Step Details

*Description

Load Geography Reference Obj

*Step Order

5020

*Process Job

EI_OBJLD

Load Objects from Stage tbls

Depend On Step

Product Category

Sales Incentive Management

Market Template

*Step Type

Batch

☐ Driver Step

☐ Close Step

☐ Allocate Step

☐ Plan Step

☐ Show In Plan

☐ Show In Template

☐ Stage Load

Staging Definition

☒ Load Step

Load Definition

GEOGRAPHY

Load Geography

☐ Rollback Flag

Rollback Definition

Comments:

This step loads geography reference object from Staging to SIM Production tables.

☒ System Data

Step Definition page

Note. During engine processing, the driver engine only runs a step if the previously executed step is successfully processed.

Description	Enter a description for the step. The system displays this description on various processing pages to identify the step.
Step Order	Enter the default order in which steps should display in a job—steps display in descending numeric order. This order can be overridden within the job. This field does not control the step execution sequence order. Step processing execution is determined on the Define Jobs page. See Chapter 18, “Processing Incentive Transactions,” Defining Jobs, page 372.
Process Job	Select from available job IDs. Jobs are defined using PeopleTools Process Scheduler functionality, on the Job Definition page. Though Sales Incentive Management delivers predefined job IDs, you may have to define your own job IDs for any customized process steps that you develop.
Depend On Step	If the current step depends on the successful processing of another (primary) step, enter that primary step ID value here.
Step Type	Select the type of engine used for the step. Available values are: <i>Batch:</i> Select for preallocation, post-allocation, stage loading, and other non-context steps. Select for steps that <i>do not</i> involve plan context (participants, incentive plans, and compensation structure nodes) and incentive processing, such as preallocation, post-allocation, and stage loading.

Context: Select for incentive processing steps, such as allocation, that take into account all the plan context (participants, incentive plans, and compensation structure nodes) that are specified for the process on the Job Definition page.

Driver Step	Select to indicate the step initiates from a driver engine.
Close Step	Select to indicate the final step of a job run. The driver engine closes the job run upon successful completion of this step.
Allocate Step	Select to indicate that the step allocates transactions.
Plan Step	Select to indicate this processing step is also plan step in a plan or plan template, and specify if this plan step is available as a field value in plans, plan templates, or both.
Show In Plan	Select to make the step available in a plan as an option for the Step ID field in the Processing Steps group box.
Show In Template	Select to make the step available in a plan template as an option for the Step ID field in the Processing Steps group box.
Stage Load and Staging Definition	Select to indicate that the step loads compensation structure tree data from the PeopleTools tree tables to SIM staging tables. Then select the staging definition that you want to use for this step. You define staging definitions on the Define Staging Parameters page.
Load Step and Load Definition	Select to indicate that the step loads transactional or reference data from the SIM staging tables to the SIM production tables. Then select the load definition that you want to use for this step. You define load definitions on the Configure Load Steps page.
Rollback Flag and Rollback Definition	Select to indicate that the step activates the engine rollback process. Then select the rollback definition that you want to use for this step. You define rollback definitions on the Rollback Definitions page.
Comments	Enter any descriptive details or notes about the step, such as a description of what the step does.

Reviewing Delivered Step Definitions

This table lists and describes the step definitions that Sales Incentive Management delivers:

Step ID	Market Template	Description
ALLOCATE	Any	This step executes the Allocation engine.
BATCH	Any	This step executes the Transaction batching engine.
BULK_REPL	Any	Use to replicate data from production to reporting tables.

Step ID	Market Template	Description
B_PREP_R_F	Any	Use to create Crystal report-based UIOs and mark them published when they are created successfully.
B_PREP_R_I	Any	This step is similar to B_PREP_F_I, but use it only to recreate the report that previously has not been created or failed to be created.
B_PUB_R	Any	Use to mark report published.
B_REL_R	Any	Use to provide access to participants to view the report.
B_UNPUB_R	Any	Use to reverse the action taken by the B_PUB_R step.
B_UNREL_R	Any	Use to reverse the action taken by the B_REL_R step.
CLOSE	Any	This step calls the Close process which closes the period for processing.
COMMISSION	Any	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. You can add additional steps for use within your own plans.
CONTEXT	Any	This step calls the Context creation engine which verifies context and creates it where it is missing. The system executes this step whenever you place it as a dependent step on the plan step definitions. For example, if you say CREDIT is dependent on CONTEXT then the engine will first execute CONTEXT, and then execute CREDIT.
CREDIT	Any	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. You can add additional steps for use within your own plans.
LD_ACCOUNT	BCM	This step calls the stage loading engine to load Account object.

Step ID	Market Template	Description
LD_ACCTGRP	BCM	This step calls the stage loading engine to load Account group object.
LD_BCUST	BCM	This step calls the stage loading engine to load BCM customer object.
LD_BPRD	BCM	This step calls the stage loading engine to load BCM product object.
LD_BRKLIC	BCM	This step calls the stage loading engine to load Broker License object.
LD_CHANNEL	Any	This step calls the stage loading engine to load Channel object.
LD_COMPSTR	Any	This step calls the specialized engine for loading compensation structure.
LD_CUST	HTI	This step calls the stage loading engine to load Customer object.
LD_GEO	Any	This step calls the stage loading engine to load Geography object.
LD_INDSTRY	Any	This step calls the stage loading engine to load Industry object.
LD_PACKAGE	BCM	This step calls the stage loading engine to load Package object.
LD_PARTIC	Any	This step calls the stage loading engine to load Participant object.
LD_PART_GR	Any	This step calls the stage loading engine to load Participant Group object.
LD_PRODUCT	HTI	This step calls the stage loading engine to load Product object.
LD_REF_GRP	Any	This step calls the stage loading engine to load Reference Group object.
LD_ROLE	Any	This step calls the stage loading engine to load Role object.
LD_TREE	Any	This step calls the specialized engine for loading a Tree.
LD_VARS	Any	this step executes the specialized engine for loading variable overrides.
LD_WKHR	BCM	This step calls the stage loading engine to load Work Hours object.

Step ID	Market Template	Description
NEW_ACCT	HTI	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. There is nothing different between these steps on the step definition. The difference is in the rules that are associated to the step via the sections in the plan. You can add additional steps for use within your own plans.
NEW_ACCT_M	HTI	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. There is nothing different between these steps on the step definition. The difference is in the rules that are associated to the step via the sections in the plan. You can add additional steps for use within your own plans.
NEW_ACCT_Q	HTI	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. There is nothing different between these steps on the step definition. The difference is in the rules that are associated to the step via the sections in the plan. You can add additional steps for use within your own plans.
NEW_CUST	BCM	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. There is nothing different between these steps on the step definition. The difference is in the rules that are associated to the step via the sections in the plan. You can add additional steps for use within your own plans.

Step ID	Market Template	Description
PAYOUT_M	Any	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. There is nothing different between these steps on the step definition. The difference is in the rules that are associated to the step via the sections in the plan. You can add additional steps for use within your own plans.
PAYOUT_Q	Any	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. There is nothing different between these steps on the step definition. The difference is in the rules that are associated to the step via the sections in the plan. You can add additional steps for use within your own plans.
PAYOUT_Y	Any	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. There is nothing different between these steps on the step definition. The difference is in the rules that are associated to the step via the sections in the plan. You can add additional steps for use within your own plans.
PAY_CLUB	HTI	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. There is nothing different between these steps on the step definition. The difference is in the rules that are associated to the step via the sections in the plan. You can add additional steps for use within your own plans.
POST-ALLOC	Any	This step executes the post-allocation engine. It must be run after the Allocation engine.

Step ID	Market Template	Description
POST_M	Any	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. There is nothing different between these steps on the step definition. The difference is in the rules that are associated to the step via the sections in the plan. You can add additional steps for use within your own plans.
POST_Q	Any	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. There is nothing different between these steps on the step definition. The difference is in the rules that are associated to the step via the sections in the plan. You can add additional steps for use within your own plans.
POST_Y	Any	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. There is nothing different between these steps on the step definition. The difference is in the rules that are associated to the step via the sections in the plan. You can add additional steps for use within your own plans.
PRE-ALLOC	Any	This step executes the pre-allocation engine. It must be run prior to running Allocation.
PUBLISH_PY	Any	This step publishes messages to PeopleSoft Enterprise Payroll for North America.

Step ID	Market Template	Description
QTR_BONUS	Any	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. There is nothing different between these steps on the step definition. The difference is in the rules that are associated to the step via the sections in the plan. You can add additional steps for use within your own plans.
RLBK_OPP	HTI	This step executes the rollback engine to rollback the objects identified in Rollback Definition: CRM_OPPORTUNITY.
RLBK_PROJ	HTI	This step executes the rollback engine to rollback the objects identified in Rollback Definition: PROJECTED_REPORTING.
RLBK_REAL	Any	This step executes the rollback engine to rollback the objects identified in Rollback Definition: REAL_REPORTING.
ROLLBK_ALL	Any	this step executes the rollback engine to rollback the objects identified in Rollback Definition: COMPLETE_ROLLBACK.
ROLLBK_RPT	Any	this step executes the rollback engine to rollback the objects identified in Rollback Definition: REPORTING.
ROLLBK_SRC	Any	this step executes the rollback engine to rollback the objects identified in Rollback Definition: RAW_TRANSACTIONS.
ROLLBK_TXN	Any	This step executes the rollback engine to rollback the objects identified in Rollback Definition: EIM_TRANSACTIONS.
ROLLBK_VAR	Any	this step executes the rollback engine to rollback the objects identified in Rollback Definition: EIM_VARIABLES.

Step ID	Market Template	Description
ROLLUP	Any	this is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. There is nothing different between these steps on the step definition. The difference is in the rules that are associated to the step via the sections in the plan. You can add additional steps for use within your own plans.
SECURITY	Any	This step executes the security engine which updates security for participant reporting.
SEQ_VAL	Any	This step executes the sequence validation engine which updates the EI_SEQ_TBL.
VCONTEXT	Any	CONTEXT creates the Working set. VCONTEXT is the context validation step. It makes sure that the compensation structure is in sync with the context table. If the compensation structure is not in sync, it updates entries in EI_CONTEXT_TBL. For the system to use this step, you have to explicitly put it in a job. This step functions as a check in case you enter data through non-standard means.
WRK-STP	BCM	This step calls the stage loading engine to load Work Hours object.
YRLY_BONUS	Any	This is a “plan step” that executes the plan calculation engine. There are several delivered plan steps (such as CREDIT, ROLLUP, etceteras) that are examples of steps that can be used within a plan to execute the plan rules. There is nothing different between these steps on the step definition. The difference is in the rules that are associated to the step via the sections in the plan. You can add additional steps for use within your own plans.

Reviewing Delivered SIM Job Definition Data

This table lists the delivered PeopleTools Process Scheduler Application Engine process for Sales Incentive Management. PeopleSoft also delivers several Crystal processes for reporting (not listed in the table). For a complete list of processes navigate to PeopleTools, Process Scheduler, Processes and search for process names that begin with *EI*.

Name	Description
EI_ALLOCTX	Traceable Allocation engine.
EI_BATCH	PCM Transaction Batching engine batches EIM staging transaction for inclusion into current processing run.
EI_CONTEXT	EIM Context Creation engine.
EI_CSTR_LOAD	EIM Compensation Objects Load engine.
EI_ENGINE	EIM Plan Processing engine.
EI_LOAD_STG	This engine is for tree loading. It calls the EI_TREELoad application engine program.
EI_MASTER	The driver engine for EIM PCM process. This engine is responsible for the scheduling of PCM job steps.
EI_MERGERUNS	This process is designed to bundle run context together and run them all together in one run.
EI_PMNT_PUB	Disburse and publish Ledger payout lines.
EI_POSTALLOC	Updates claim counts after EIM batch allocation.
EI_PREALLOC	This job prepares the batch for EI_ALLOCATX to run in parallel mode.
EI_REFOBJLD	EIM Reference object loader engine.
EI_REPLENG	Bulk Replication engine.
EI_ROLLBACK	EIM Rollback engine.

Name	Description
EI_RPTGENG	Bulk Reporting engine.
EI_SECURITY	EIM Security engine.
EI_TEMP_MGT	Template Management engine.
EI_VAL_SEQ	EIM Sequence Table Validation engine.
EI_VALID_CTX	EIM Valid Context engine.
EI_VAROVRD	Load Variable Overrides from Source engine.

This table lists the delivered EIM process job names in the database and their associated step definitions for the EIM foundation and SIM product category levels. EIM process jobs and their associated step definitions for the market template level are documented in their corresponding PeopleBooks. All EIM process jobs are delivered to run in *Serial Run Mode*, with *Medium Priority*. To access these job definitions, navigate to PeopleTools, Process Scheduler, Jobs and search for process job names that begin with *EI*. To access the step definition step IDs, navigate to Compensation, Sales Incentives, Define Sales Incentive Options, Step Definition.

Process Job Name	Description	Associated Processes	Step Definition Step ID
EI_ALLOC	EIM Allocation step	EI_ALLOCTX EI_MASTER	ALLOCATE
EI_BREPL	EIM Bulk Replication	EI_REPLENG EI_MASTER	BULK_REPL
EI_BRPTG	Bulk Reporting engine	EI_RPTGENG EI_MASTER	B_PREP_R_F B_PREP_R_I B_PUB_R B_REL_R B_UNPUB_R B_UNREL_R

Process Job Name	Description	Associated Processes	Step Definition Step ID
EI_CALC	EIM Calculation step	EI_ENGINE EI_MASTER	COMMISSION CREDIT NEW_ACCT NEW_ACCT_M NEW_ACCT_Q NEW_CUST PAY_CLUB PAYOUT_M PAYOUT_Q PAYOUT_Y POST_M POST_Q POST_Y QTR_BONUS ROLLUP YRLY_BONUS
EI_CLOSE	EIM Close Step	EI_MASTER	CLOSE
EI_COBJS	Load compensation objects from stage	EI_CSTR_LOAD EI_MASTER	LD_COMPSTR LD_TREE
EI_CTXT	EIM Context Creation step	EI_CONTEXT EI_MASTER	CONTEXT

Process Job Name	Description	Associated Processes	Step Definition Step ID
EI_OBJLD	Load objects from stage tables	EI_REFOBJLD EI_MASTER	LD_ACCOUNT LD_ACCTGRP LD_BCUST LD_BPRD LD_BRKLIC LD_CHANNEL LD_CUST LD_GEO LD_INDSTRY LD_PACKAGE LD_PART_GR LD_PARTIC LD_PRODUCT LD_REF_GRP LD_ROLE LD_WKHR WRK-STP
EI_PREAL	EIM Pre-Allocation step	EI_PREALLOC EI_MASTER	PRE-ALLOC
EI_PSTAL	EIM Post-Allocation step	EI_POSTALLOC EI_MASTER	POST-ALLOC
EI_PUBPY	Publish payment request messages	EI_PMNT_PUB EI_MASTER	PUBLISH_PY

Process Job Name	Description	Associated Processes	Step Definition Step ID
EI_RLBCK	EIM rollback step	EI_ROLLBACK EI_MASTER	RLBK_OPP RLBK_PROJ RLBK_REAL ROLLBK_ALL ROLLBK_JOB ROLLBK_RPT ROLLBK_SRC ROLLBK_TXN ROLLBK_VAR ROLLBKSTG
EI_SECUR	EIM Security step	EI_SECURITY EI_MASTER	SECURITY
EI_STLOD	EIM Tree Load	EI_LOAD_STG EI_MASTER	This job is used for tree loading.
EI_TXBAT	PCM Transaction Batch engine	EI_BATCH EI_MASTER	BATCH
EI_VALSQ	Validate EIM Sequence Table	EI_VAL_SEQ EI_MASTER	SEQ_VAL

Process Job Name	Description	Associated Processes	Step Definition Step ID
EI_VCTXT	<p>EIM Validating Context step</p> <p>Note. The delivered step <i>VCONTEXT</i> is an optional step. If you decide to use this step, it must be identified as a Depend on Step on the Step Definition page for each step that is located at the beginning of a Job Schedule.</p>	<p>EI_VALID_CTX</p> <p>EI_MASTER</p>	VCONTEXT
EI_VROVD	Variable Overrides	<p>EI_VAROVRD</p> <p>EI_MASTER</p>	LD_VARS

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler, “Defining Processes”

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler, “Defining Jobs”

PeopleSoft Enterprise Sales Incentive Management for High Tech and Industrial 8.9 PeopleBook

PeopleSoft Enterprise Sales Incentive Management for Banking and Capital Markets 8.9 PeopleBook

CHAPTER 8

Managing Market Templates

This chapter provides an overview of the Vertical Development Kit (VDK) and discusses how to:

- Migrate template object data.
- Troubleshoot market template development.

Understanding the VDK

Developers and implementers extend existing templates and build new ones using various tools and technology (PeopleTools, Java, Crystal Reports, and so on) that are standard for PeopleSoft applications. Then, they register new objects, formulas, and engines to the EIM foundation. Along the way, they must test the changes that they are doing, migrate them into production, and upgrade them as new versions become available. The VDK makes the development process for market templates more efficient and higher quality.

The VDK enables you to easily tailor the market templates to your own business needs. It helps you manage and analyzing the data between source and target systems. The VDK consists of documentation, design components, and utilities for the building, customizing, and configuring of the market templates.

The documentation component of the VDK, which is the largest component, relates how-to information as well as guidelines and standards and consists of small, very focused documents. These documents assume good knowledge of underlying technology, and focus on checklist items, common functions and methods, and related information. Each specific area has a technical concept overview document that sets the top-level architecture and overall design coding patterns. The following is a list of the specific areas with related documents that are delivered as part of the VDK:

- General and foundation information.
- Compensation administrator and IT related information.
- Data-acquisition related information.
- Engines.
- Reporting and participant UI.
- Testing and quality assurance.

With the focus on implementers building and extending market templates, the design component of the VDK includes the following enhancements to the code base:

- Application programming interfaces.
- Error management.
- Debugging.
- Formula extensions.

- Template objects and data upgrade capabilities.

The complexity of the PeopleSoft Sales Incentive Management product requires the delivery of some utilities to help in template development, mostly to aid in testing or validating data integrity. The utilities component of the VDK includes the following utilities built into the Sales Incentive Management system:

- PeopleTools and EIM metadata integrity through the Import Tools Fields button on the Base Catalog and Object Catalog pages.

The EIM foundation relies on EIM metadata being in sync with the underlying PeopleTools objects. When the two metadata layers don't match, numerous problems occur within the application.

- Base class and derived class data integrity through the Data Integrity Audit page.
- Related object viewing accessibility through the View Class button on the Object Catalog page.
- Template cloning through the Clone Template page, plan cloning through the Clone Plan page, and object cloning through the Template Data page.
- Market template object reports through the Market template report page.
- UIO cloning through the Clone UIO button on the User Interaction - Pages, User Interaction - Reports, and User Interaction - Configurable pages.
- Dynamic page generator to render participant UIs based on configurable UIOs.
- Rule tracer capabilities (through the Rule Tracing check boxes and View Trace Log pages) to enhance the compensation administrator's ability to debug incentive plan processing.

Migrating Template Object Data

To migrate template object data, use the Template Management component (EI_TEMP_MGT_TBL).

This section provides an overview of the Data Migration tool and discusses how to:

- Use the Data Migration tool.
- Analyze the compare report.

Understanding the Data Migration Tool

Use the Data Migration tool to:

- Move data from one database to another by exporting the data from one database and importing it into another.
- Clone data by exporting the data for a specific business unit, setID, or main object key, then importing that data back into the database under a different business unit, setID, or main object key.
- Delete data from the database.
- Run a compare report between the objects in the current definition that you are importing and the corresponding objects that already exist in the database to determine which objects to import.

The Data Migration tool is intended to move small amounts of data; it is not designed for bulk data movement. This tool is necessary for spot moving of items with a complex underlying structure, such as plans and compensation structures. To improve performance speed for large amounts of data with relatively simple underlying structures, PeopleSoft recommends that you use Data Mover to migrate the data from one database to another.

The Data Migration tool has many benefits. This tool gives you the ability to clone objects and to resequence object keys. It also ensures that any sequence keys the data might have are unique so that you will not have any duplicate data values once you import the data into the target database. You can also use the Data Migration tool to evaluate the differences between the object data that you are importing and the object data that already exists in the database to determine whether you want to import the data. After you compare the data and analyze the differences, you have the option to import or not import each specific object. This functionality is especially important when applying PeopleSoft delivered upgrades of objects to the database. You can open an upgrade definition in the Template Management component, run a compare report to analyze the differences, and then decide which objects you want to import. Data Mover does not have these capabilities.

Access the Data Migration tool through the Template Management component.

Special Instructions for Using the Data Migration Tool to Establish Market Template Data

Market Template data is pre-delivered in your DEMO database. During implementation, you may choose to move some or all of the market template data into your SYS (production) database, using the Data Migration Tool. This task will be part of any Setup Manager Configuration set which includes the Template Management component (EI_TEMP_MGT_TBL).

Similar to some other components, the Template Management component (EI_TEMP_MGT_TBL) has additional configuration items that are defined in Setup Manager. The Template Management component is a special case for Sales Incentive Management because its additional configuration consists of three steps.

This is not a setup component that needs to be populated; rather, it is a tool to import setup data from DEMO to SYS database. The result of executing these steps will be that various setup components are populated with data. The general steps in the Additional Configuration component of Setup Manager are as follows:

Setup Component	Pre or Post	Feature Specific	Type	Name	Instructions
EI_TEMP_MGT_TBL	Pre	No	Other	EXPORT FROM DEMO	Export from your demo database.
EI_TEMP_MGT_TBL	Pre	No	Other	SETID BU UPDATE	Update SetID or business unit if necessary.
EI_TEMP_MGT_TBL	Pre	No	Other	IMPORT TO SYS	Import into your production database.

Delivered Import/Export Definitions

There are delivered import/export definitions for moving template data between databases. You need to perform the following steps for each of these import/export definitions:

1. Log on to the DEMO database.
2. Find the appropriate import/export definition (see table below).

3. Modify the definition to specify XML file destination.
4. Click the Export button to export the data from DEMO to an XML file.
5. Log on to SYS (production) database.
6. Find the appropriate import/export definition (see table below).
7. Modify the definition to include the XML file location (same location as in step 3).
8. (Optional) Include a value for Replace SetID or Replace Business Unit fields.
9. (Optional) Clear check boxes for any data that you do not want in your SYS database.
10. Click the Import button to import the data from XML file into SYS.

Delivered data uses two SetIDs: MODEL and SHARE. Most of the SIM components use record group EI_01 which is set to SetID SHARE. Some calendar objects (in Record Group FS_02) use MODEL.

For each Set Control Value (business unit or setID), you may choose to use your own SetIDs, rather than MODEL and SHARE. However, you can only use two for each Set Control Value – one for Record Group EI_01 and another for record group FS_02. In the import/export definitions, if you choose to replace SHARE in one definition, you should use the same replacement setID in all other definitions referencing SHARE. Similarly if you choose to replace MODEL in an import/export definition, you should use the same replacement setID in all other definitions referencing MODEL.

The recommendation is to use MODEL as delivered unless there is a business reason to replace it.

If the implementation is to have only one setID for all business units, the recommendation is to use SHARE as delivered. It is recommended to replace the delivered setIDs only in the case where the business requirements dictate separation of setIDs between business units.

Import/Export Definition	Comments
SY_ROLLBACK	Rollback groups and rollback definitions used for both the BCM and HTI market templates.
SY_BCM_CAL	Calendar 01 used by BCM plans. Also note that the setID for the Calendar (Detail) object should be changed to the SetID that is used for FS_02. For much of the test data, this can remain at MODEL.
SY_BCM_NON_PLAN_JOBS	Jobs delivered for the BCM market template sample business unit, not related to running a plan.
SY_BCM_PLANS	Plans, plan templates, lookup tables, commission tables and plan jobs for the BCM market template. Note the following: update plan jobs to use your own compensation structure.
SY_BCM_SETUP	Roles, payment codes, performance categories, performance measures, rollup layers, lookup table structures, and commission tables structures for the BCM market template.
SY_BCM_STEPS	Steps used in the BCM market template. Configuration for BCM load steps.
SY_BCM_UIOS	User interaction objects (PIA pages, reports, configurable UIO pages, UIO groups) for the BCM market template.

Import/Export Definition	Comments
SY_HTI_CAL	Calendar 00 used by BCM plans. Also note that the setID for the Calendar (Detail) object should be changed to the SetID that is used for FS_02. For much of the test data, this can remain at MODEL.
SY_HTI_NON_PLAN_JOBS	Jobs delivered for the HTI market template sample business unit, not related to running a plan.
SY_HTI_PLANS	Plans, plan templates, lookup tables, commission tables and plan jobs for the HTI market template. Note the following: update plan jobs to use your own compensation structure.
SY_HTI_SETUP	Roles, payment codes, performance categories, performance measures, rollup layers, lookup table structures, and commission tables structures for the HTI market template.
SY_HTI_STEPS	Steps used in the HTI market template. Configuration for HTI load steps.
SY_HTI_UIOS	User interaction objects (PIA pages, reports, configurable UIO pages, UIO groups) for the HTI market template.

Pages Used to Migrate Template Object Data

Page Name	Object Name	Navigation	Usage
Template Data	EI_TEMP_MGT_PG	Compensation, Sales Incentives, Define Sales Incentive Options, Template Management, Template Data	Import or export data from one database to another, clone data, delete data, and run reports to compare incoming data to existing data in the database.
Compare Report	EI_TEMP_MGT_HTML	Compensation, Sales Incentives, Define Sales Incentive Options, Template Management, Compare Report	Analyze the results of the compare report to determine which objects to import into the database. The compare report shows the differences between the objects in the current definition that you are importing and the corresponding objects that already exist in the database.

Using the Data Migration Tool

Access the Template Data page.

Template Data page

General Page Elements

Definition

The name of the template data definition. To add a new definition, enter the name of the file without the XML extension. To import a file, enter the name of the file that you are importing. To export a file, enter a meaningful name for the definition. When you export the data in the definition, the process automatically creates an XML file with this definition name and saves the export data to the XML file in the file location that you specify.

System Data

If selected, the data on the page is system data delivered by PeopleSoft. This field is for information purposes and is unavailable for edit. When you create a new definition, the system clears this check box to indicate that the definition is not delivered system data. The objects in the definition remain system data except under the following circumstances:

- If you replace the business unit or setID for the object type with a new value, the process clears the System Data check box for all object keys that you list.
- If you replace a specific object key with a new value, the process clears the System Data check box for that specific object key.

The process clears the related system check boxes for these objects because the objects are now clones of the system data and not the actual system data.

Definition Source

File Location

Enter the location where you want to save the file that you are exporting, or enter the location of the file that you are importing. If the file location is on the same machine on which the application server is running, enter the directory path. For example, *c:\temp*. If the file location is on another machine, also include the machine name. For example, *\\machinename\temp*. Make sure that the directory where the file is stored is a shared directory.

Duplicate Data Behavior

Select how you want the process to handle the duplicate data that it encounters when importing objects from a template data definition XML file into the database. These options apply only to importing data.

Import All or Nothing

Select this option to import all objects listed in the definition file only if the process finds no duplicate objects in the database. If the process finds duplicates, it does not import any objects from the definition file.

Import All except Duplicates

Select this option to import all objects listed in the definition file that are new to the database. If objects already exist in the database, the process does not import the duplicate objects.

Import All (Overwrite existing)

Select this option to import all objects listed in the definition file into the database. If the process encounters duplicate objects, it overwrites the existing object in the database with the object from the definition file. In most cases, select this option.

EIM Object

Use this group box to review the objects that you want to process. By replacing the values of the object keys, you can also use this group box to clone objects.

Object Type

Select from the list of all supported PeopleSoft Sales Incentive Management objects the type of object that you want to process. Based on your selection, the system dynamically displays the appropriate object keys above and below the Object Keys grid.

The following types of objects require special handling:

Compensation Structure:

During export, the process exports the corresponding Tools Tree at the same time as the compensation structure. The process, however, *does not* export the contexts that are associated with the compensation structure.

During import, the process imports the corresponding Tools Tree at the same time as the compensation structure. In addition, the process calls the context validation engine. This engine synchronizes the compensations structure that you are importing with the existing context table in the target database. If the engine encounters contexts in the context table that do not exist on the imported compensation structure, it marks the contexts as inactive in the context table. If the engine determines that there are objects on the imported compensation structure that do not exist in the context table, the engine generates new

contexts for the objects. The context validation engine furthermore preserves the original context in the target database, which is the production database, in order to maintain correct links between the original context and existing production data. Note that the context validation engine does not simply copy all contexts from the source database to the target database because the same object in the source and target databases might have different contexts.

Plan and Plan Template:

You must copy the plan and the corresponding plan template together from one database to another. You must maintain the plan and related plan template in the same database.

When exporting a plan or plan template, it may contain reference variables from a configuration plan. Consider moving the configuration plan when necessary.

When exporting a plan with overrides, the process also exports the contexts associated with the overrides for use during import into another database.

When importing a plan with overrides, the process first imports the plan and its context from the source system. Then the process imports the contexts for the overrides into a temporary table. Next the process updates the context for the imported plan with the correct context from the context table by comparing all of the context attributes from the source database with all of the context attributes in the target database. Once the process completes these import tasks it retrieves the correct context from the context table and updates the plan tables with this context.

Class ID

The system displays this field only if the Object Type that you select is a base class object with derived class objects. Select the class ID of the specific derived class object that you want to process. The system displays for your choices all of the derived class objects that are a child to the base class object. For example, if you are importing or exporting customers, select the *Reference Object* object type and the *Customer* class ID. If you have added a new derived class object to the database, the system displays that derived class object in your list of choices.

SetID and Replace SetID with

The system displays these fields only if the Object Type that you select is keyed by setID. You must select the setID for which you want to process data. After you select the setID, you are then able to select specific objects in the Object Keys grid. You also have the option to replace the setID that you selected with a different setID by selecting one of the other setIDs in the database. This is useful if you want to change the setID for the objects you are importing or exporting, effectively cloning the data.

Business Unit and Replace Business Unit with

The system displays these fields only if the Object Type that you select is keyed by business unit. You must select the business unit for which you want to process data. After you select the business unit, you are then able to select specific objects in the Object Keys grid. You also have the option to replace the business unit that you selected with a different business unit by selecting one of the other business units in the database. This is useful if you want to change the business unit for the objects you are importing or exporting, effectively cloning the data.

Object Keys

Based on your selection in the Object Type field, the system displays the appropriate object key fields in the Object Keys grid. In the object key fields, select the objects that you want to process. If you leave these fields blank, the system processes all objects for the specified object type and object keys (if applicable) for all effective dates. For example, if you select *Compensation Structure* in the Object Type field and specify *GBIBU* in the Business Unit field, the system processes all compensation structures that have the GBIBU business unit. To save time when adding multiple objects, the system enables you to specify the number of rows that you want to add to the Object Keys grid and immediately populates the grid with the desired number of rows.

Select	The system selects this check box by default. Clear this check box if you do not want to process the corresponding object.
<Object Key>	Select the keys for the specific objects that you want to process. The system bases your options on the selected object type and, if applicable, the additional object keys.
Effective Date	Select the specific effective date of the object that you want to process to require an effective date for all objects that have an effective date as a key. The system displays as choices all effective dates for the selected object on that row. .
Replace <Object Key> with	Optionally, enter a new name for the object key on the given row to clone the object. When you import the object into another database, the system no longer considers this object system data.

Additional Page Elements

Use this group box to run processes and view messages. When you click the Import, Export, or Compare Report buttons, the system determines the amount of data that you are processing. If there are more than 20 rows of object data, the system automatically schedules the EI_TEMP_MGT Application Engine process to run through PeopleTools Process Scheduler. Regardless of the number of rows of data, the system always schedules the EI_TEMP_MGT Application Engine process to run through the PeopleTools Process Scheduler for compensation structures, and detail calendars because of their complex underlying structures and size. The system informs you about the scheduling of the process through a message in the Message Log text box.

Load Page	If you are importing objects, click this button to load an existing template data definition source file into this definition. The system retrieves data from the XML source file that matches the name of this definition less the XML extension. The system retrieves this source file from the location that you specify in the File Location field.
Export	Click this button to export the object data in the current definition into an XML file. The process saves all of the object data to an XML file with the same name as this definition in the location that you specify in the File Location field. You can then use this XML file as a template data definition source file when importing object data into another database.
Import	Click this button to insert object data from the current definition into the database. Before importing the data, you must first load the data from a template data definition source file through the Load Page button.
Delete	Click this button to delete the object data specified in the current definition from the database. For certain object types, the system prevents you from deleting any data in general, or the system prevents you from deleting data for all object keys for a specific object type.

Warning! Carefully evaluate whether you want to delete data from the database because the data is irretrievable.

Compare Report

Click this button to compare each object in the current definition with the corresponding object in the database. After comparing the object data, the process generates a report detailing the differences between the data that you are importing from a file and the corresponding object data that already exists in the database. The system displays the report on the Compare Report page of this component.

Message Log

The system displays messages from the processes in this text box. The messages explain the status for each row that the system processes. If the system schedules one of the processes to run the EI_TEMP_MGT Application Engine process through PeopleTools Process Scheduler, the system informs you about that scheduling here as well.

Process Monitor

Click this link to access the Process Monitor component of the Process Scheduler, where you can access run status details for any process instance that is scheduled to run through the Process Scheduler.

Analyzing the Compare Report

Access the Compare Report page.

Template Data		Compare Report							
EI_PERF_MEASURE									
Record	SETID	PERF_MEASURE	EFFDT	EFF_STATUS	DESCR	DESCRSHORT	PERF_CATEGORY	FOUNDATION	EI_PRODCATEGORY
Import	SHARE	PROD_REV	1900-01-01	A	Product Revenue	Prod Rev	REVENUE	EIM	SI
Existing	SHARE	PROD_REV	1900-01-01	A	Prod Rev	Prod Rev	ACCOUNT	EIM	SI
Changes					Product Revenue		REVENUE		

Compare Report page

When you run a compare report the process compares data between the object that you are importing and the corresponding database object and displays the differences on this page. For each object where the process encounters differences, the process displays the table object name, the fields on the table, the field values for the data that you are importing, and the field values for the existing database data. Analyze the differences to determine whether to import the object into the database. Return to the Template Management page and adjust the settings to manage which template object data you want to import.

Troubleshooting Market Template Development

This section discusses how to:

- View Java environment settings.
- Validate data integrity.
- View market template object reports.

Pages Used to Troubleshoot Market Template Development

Page Name	Object Name	Navigation	Usage
Java Environment Information	EI_SY_ENV_DATA	Compensation, Sales Incentives, Define Sales Incentive Options, Development Utilities, Java Environment Settings, Java Environment Information	View information to troubleshooting the Java running environment.
Data Integrity Audit	EI_VALIDATION_TBL	Compensation, Sales Incentives, Define Sales Incentive Options, Development Utilities, Data Integrity Audit, Data Integrity Audit	Seek problematic data that violates the data integrity rules of the Sales Incentive Management product.
View Explanation	EI_VALIDATION_SPG2	Click the View Explanation button on the Data Integrity Audit page.	View a more detailed description of the data integrity problem.
View SQL	EI_VALIDATION_SPG3	Click the View SQL button on the Data Integrity Audit page.	View the SQL that you can use to retrieve the offending records of the data integrity problem.
Market Template Report	EI_MARKET_TMPL_RPT	Compensation, Sales Incentives, Define Sales Incentive Options, Development Utilities, Market Template Report, Market Template Report	View all objects registers as metadata in the system for a specified foundation, product category, or market template. The system displays all objects for the specified level and higher.

Viewing Java Environment Information

Access the Java Environment Information page.

Java Environment Information

```

Total Memory:          47726592
Free Memory:         8618408
EIM Jar Version:      S109
EIM Jar Location:     file:/E:/Enterprise/SIM/890/S109/class/com.peoplesoft.im.eim.jar
Java Environment:
{java.runtime.name       =Java(TM) 2 Runtime Environment
Standard Edition
sun.boot.library.path    =F:\PeopleTools\84506B\jre\bin
java.vm.version          =1.4.2_03-b02
java.vm.vendor            =Sun Microsystems Inc.
java.vendor.url           =http://java.sun.com/
path.separator            =;
java.vm.name              =Java HotSpot(TM) Client VM
file.encoding.pkg        =sun.io
user.country              =US
sun.os.patch.level       =Service Pack 3
java.vm.specification.name =Java Virtual Machine Specification
user.dir                  =F:\PeopleTools\84506B\appserv\I1B89000
java.runtime.version      =1.4.2_03-b02
java.awt.graphicsenv      =sun.awt.Win32GraphicsEnvironment
java.endorsed.dirs        =F:\PeopleTools\84506B\jre\lib\endorsed
os.arch                   =x86
java.io.tmpdir            =c:\Temp\
line.separator            =
java.vm.specification.vendor =Sun Microsystems Inc.
user.variant              =
os.name                   =Windows 2000
sun.java2d.fontpath       =
java.library.path         =F:\PEOPLETOOLS\84506B\BIN\SERVER\WINX86;. ;C:\WINNT\system32;C:\WINNT;F:\PeopleTools\84506B\appserv\I1B89000;
java.specification.name   =Java Platform API Specification
java.class.version        =48.0
java.util.prefs.PreferencesFactory =java.util.prefs.WindowsPreferencesFactory
os.version                =5.0
user.home                 =C:\Documents and Settings\Default User
user.timezone             =America/Los_Angeles
java.awt.printerjob       =sun.awt.windows.WPrinterJob

```

Java Environment Information page (1 of 2)

```

file.encoding             =Cp1252
java.specification.version =1.4
                           E:\Enterprise\SIM\890\S109\class\com.peoplesoft.im.bcm.jar;E:\Enterprise\SIM\890\S109\class\com.peoplesoft.im.eim.jar;
                           logging.jar;F:\PeopleTools\84506B\class\jaxrpc.jar;F:\PeopleTools\84506B\class\jimi.jar;F:\PeopleTools\84506B\class\jsimp
                           1.2.8.jar;F:\PeopleTools\84506B\class\mail.jar;F:\PeopleTools\84506B\class\NetComponents.jar;F:\PeopleTools\84506B\cla
                           1.1b.jar;F:\PeopleTools\84506B\class\xmlb-api-20021118.jar;F:\PeopleTools\84506B\class\xmlb-common.jar;F:\PeopleTc
user.name                  =mvasconc
java.vm.specification.version =1.0
java.home                  =F:\PeopleTools\84506B\jre
sun.arch.data.model        =32
user.language              =en
java.specification.vendor  =Sun Microsystems Inc.
awt.toolkit                =sun.awt.windows.WToolkit
java.vm.info               =mixed mode
java.version               =1.4.2_03
java.ext.dirs              =F:\PeopleTools\84506B\jre\lib\ext
sun.boot.class.path        =F:\PeopleTools\84506B\jre\lib\rt.jar;F:\PeopleTools\84506B\jre\lib\i18n.jar;F:\PeopleTools\84506B\jre\lib\sunrsasign.jar;F\
java.awt.headless          =true
java.vendor                =Sun Microsystems Inc.
file.separator              =\
java.vendor.url.bug        =http://java.sun.com/cgi-bin/bugreport.cgi
sun.io.unicode.encoding    =UnicodeLittle
sun.cpu.endian             =little
sun.cpu.isalist             =pentium i486 i386}

```

Java Environment Information page (2 of 2)

View details about the Java running environment. The Sales Incentive Management product can be sensitive to the Java version. This page shows the details about the Java version applied to the system.

Important! To help resolve an issue, provide the information on this page when reporting the issue to PeopleSoft customer support.

Total Memory and Free Memory

The system displays the total Java Virtual Machine (JVM) memory that has been allocated and the amount of JVM memory that remains free at the time that you enter the page.

EIM Jar Version and EIM Jar Location

The system displays the EIM JAR version and location where the EIM JAR file is running. Inside the EIM JAR version there is a manifest file that contains

the build information. This information helps PeopleSoft customer support know the Java build and help troubleshoot by isolating fixes. The exact EIM JAR file and location becomes especially important if there have been several PeopleTools versions installed and patches applied to different places.

Java Environment














The data that displays under this field is typical JVM standard information.

Validating Data Integrity

Access the Data Integrity Audit page.

Data Integrity Audit				Run Validation	
				Customize	Find
				First	1-22 of 22
				Last	
	Class ID	Message		Number of Errors	
1	PROD	There are orphans rows of data in the base class.		1	
2	ECOB	There are orphans rows of data in the base class.		6	
3	ELON	There are orphans rows of data in the base class.		12	
4	EPMT	There are orphans rows of data in the base class.		1	
5	CUST	There are orphans rows of data in the derived class.		3	
6	PROD	There are orphans rows of data in the derived class.		3	
7	PPLN	There are orphans rows of data in the derived class.		8	
8	BASE	There are orphans rows of data in the derived class.		1	
9	EARV	There are orphans rows of data in the derived class.		24	
10	EAUM	There are orphans rows of data in the derived class.		6	
11	EIMF	There are orphans rows of data in the derived class.		6	
12	EIVS	There are orphans rows of data in the derived class.		6	
13	PAY	There are orphans rows of data in the derived class.		18	
14	UODP	There are orphans rows of data in the derived class.		1	
15		There are EIM Transactions without a Period Context and the status is not Pending.		1	
16		There are EIM Transactions without a Run Context and the status is not Pending.		1	
17		Compensation Tree is defined in the EIM Structure but not in Tree Manager.		2	
18		Compensation Tree Nodes are defined in Tree Manager but not in the EIM Structure.		41	
19		The Role ID referenced is not a valid Role in the Role Table.		5	
20		The Plan ID referenced is not a valid Plan in the Plan Table.		8	
21		Compensation Tree is not defined in the Tree Manager prompt table.		1	
22		The Plan Template referenced on the Job Definition is not valid.		13	

Data Integrity Audit page (1 of 2)

MetaData Validation Results			Customize Find 		First 	1-109 of 109	 Last
	Class ID	Message					
1	ABIT	The Class for this Object exists in the Derived record but not the Base record.					
2	AVP	Repeated Class Descriptions					
3	AVPA	Repeated Class Descriptions					
4	AVPB	Repeated Class Descriptions					
5	AVPC	Repeated Class Descriptions					

Data Integrity Audit page (2 of 2)

Run Validation

Click this button to initiate the data integrity validation process.

The process performs:

- Object audits to look for classes with invalid or missing PeopleTools records.
- Relationship audits for missing or invalid foreign class IDs, attributes, and attribute connections between two classes.
- Attribute audits for missing or invalid PeopleTools record fields.
- Description audits to ensure unique class names and descriptors.
- Java audits to instantiate the metadata object graph, ensuring that objects can be read from the database and that relationships have a valid source and target.

The system lists the results of the validation process in the MetaData Validation Results grid.

View Explanation

Click this button to access the View Explanation page, where you can view a more detailed description of the problem.

View SQL

Click this button to access the View SQL page, where you can view the SQL that you can use to retrieve the offending records.

Viewing Market Template Object Reports

Access the Market Template Reports page.

Market Template Reports

Select Template

Foundation

Product Category

Market Template

Left | Right

- + TRXN - Transaction Level - Market Tem
- + RTPL - All plans (no templates) - Mar
- + UOPG - UIO - PIA Page - Market Templa
- + 5000
- + 6800
- + 6900
- + RCRC - Batch Run Control - Market Tem
- + UOBJ - User Interaction Object - Mark
- + PSRT - Sort Definition - Market Templ
- + ENRR - Engine Run Request - Market
- + UODP - Configurable UIO - Market Temp
- + UORP - UIO - Report - Market Template
- + RTCG - Configuration plans - Market T
- + LSEC - Common Sections in the Library
- + PGCL - Performance Category - Market
- + UGRP - UIO Group - Market Template
- + TMPL - Plan Template - Market Templat
- + PCMS - Process Step - Market Template
- + LAYR - Compensation Structure Layer -
- + ROST - Role Staging - Market Template
- + MRKT - Market Template - Market Templ
- + RTIM - Templates - Market Template
- + OBJS - EIM Derived Object Descriptor
- + QSDf - Object STep - Market Template
- + PMCD - Payment Code - Market Template
- + PCTX - Period Context - Market Templa
- + CBSU - Business Unit - Market Templat
- + BCTX - BCM Transactions - EI INDUSTRY
- + BASE - EIM Base Class Descriptor - Ma
- + PMCL - Performance Measure - Market T
- + META - EIM Object Descriptor - Market
- + PC03 - Engine Run Request Language Tb
- + RTRP - All non-configuration plans -
- + PC02 - Engine Run Request Sys - Marke
- + ROLE - Role - Market Template

Market Template Reports page

Foundation, Product Category, and Market Template

Specify the foundation, product category, and market template for which you want a report of all objects for the specified level and above.

Show Objects

Click this button to refresh the report based on the template selection criteria. The system displays the results in the tree on the right of the page based on the metadata registered on the Object Catalog. Expand the tree nodes to view details.

Note. To view objects in the results, objects must first be registered as metadata in the Object Catalog. This enables Query Builder to query the information that matches the specified criteria.

CHAPTER 9

Loading Data

This chapter provides an overview of data loading and of data acquisition through Ascential DataStage and discusses how to:

- Establish Ascential DataStage security.
- Load data from source systems to staging tables.
- Load Trees From PeopleTools to staging tables.
- Load reference and participant data from staging tables to production tables.
- View error messages for stage-to-production data load.
- Correct errors for staged reference and participant data.
- Reprocess corrected errors for staged reference and participant data.
- Manage staged transaction data.

Note. This chapter mentions the Ascential DataStage tool PeopleSoft delivers for loading data into the SIM staging tables. For details on using Ascential DataStage, refer to your Ascential documentation and online help.

See Also

Chapter 7, “Setting Up Engine Processing,” page 151

Understanding the Data Loading Processes

Transferring data from your source systems to Sales Incentive Management production tables involves two steps:

1. Import data from the source system directly to the SIM staging tables.
2. Load data from staging to production tables.

Once data is in the production tables, it is ready to be used for incentive calculation. As the production tables are the last stop before the data is used to calculate incentive payout, Sales Incentive Management provides functionality so that you can view and correct the staged data and rerun the import process. This ensures that the SIM production tables are fully populated with correct information.

Understanding Data Acquisition Through Ascential DataStage

This section provides an overview and discusses:

- Data acquisition.
- Ascential DataStage.
- Projects and DataStage objects.
- Types of extract, transform, and load (ETL) jobs.
- Configuring ETL jobs.

Overview

Sales Incentive Management has an original equipment manufacturer (OEM) agreement with Ascential to supply ETL technology for data acquisition. Ascential DataStage is delivered with the Sales Incentive Management product. Ascential's DataStage ETL tool loads transaction data into the SIM staging tables using predefined ETL jobs. PeopleSoft delivers prebuilt ETL jobs to support PeopleSoft applications. These jobs identify the information contained in the PeopleSoft source systems and where that information needs to be loaded into target SIM staging tables. The jobs include data validation and lookup routines to ensure consistency and quality of the data and provide a framework for building jobs from non-PeopleSoft sources. Additionally, you can use this tool to build custom jobs for mapping your data into SIM staging tables.

See ETL job reports posted on Customer Connection under Support, Documentation, Documentation Updates, Enterprise Performance Management for a complete listing of the jobs.

See SIM data model posted on Customer Connection under Support, Documentation, Documentation Updates, Sales Incentive Management for details of the delivered SIM data model.

See *Ascential Documentation* for details on how to use Ascential and configure jobs for your needs.

Ascential DataStage Documentation

For details on the tool itself and how to use it, refer to the Ascential documentation listed below. You can install PDF versions of the Ascential books on a Windows system as part of the Ascential tools install.

This table lists the Ascential documentation and the information provided:

Ascential Book	Description
<i>DataStage Designer Guide</i>	Provides information about the DataStage Designer, and gives a general description of how to create, design, and develop a DataStage application.
<i>DataStage Manager Guide</i>	Provides information about the DataStage Manager and describes how to use and maintain the DataStage Repository.
<i>DataStage Server: Server Job Developer Guide</i>	Provides information about the tools that are used in building a server job and supplies programmer's reference information.
<i>DataStage Enterprise Edition: Parallel Job Developer Guide</i>	Provides information about the tools that are used in building a parallel job and supplies programmer's reference information.
<i>DataStage Enterprise MVS Edition: Mainframe Job Developer Guide</i>	Provides information about the tools that are used in building a mainframe job and supplies programmer's reference information.

Ascential Book	Description
<i>DataStage Director Guide</i>	Provides information about the DataStage Director and how to validate, schedule, run, and monitor DataStage server jobs.
<i>DataStage Administrator Guide</i>	Provides information about DataStage setup, routine housekeeping, and administration.
<i>DataStage Install and Upgrade Guide</i>	Provides instructions for installing DataStage on Windows and UNIX platforms, and for upgrading existing installations of DataStage.
<i>DataStage NLS Guide</i>	Provides information about using the NLS features that are available in DataStage when NLS is installed.

PeopleSoft Projects and DataStage Objects

PeopleSoft delivers a DataStage project (.dsx file) for each functional area within Sales Incentive Management. You import the project into your development environment as part of your installation and configuration process. The project contains the following delivered DataStage objects:

- Jobs.
- Stages.
- Transforms.
- Job sequencers and batches.

Projects

PeopleSoft delivers DataStage objects that define your project. The projects are organized by functional area and contain related ETL jobs. The delivered projects are:

- CRM (Customer Relationship Management).
- HRMS (Human Resources Management Solutions).
- Financials/SCM (Financials/Supply Chain Management).

Jobs

PeopleSoft delivers several predefined extract, transform, and load (ETL) jobs for use with Ascential DataStage. A job is a representation of data flow between the source and target including the stages. Stages are used to transform data as required by business requirements, and some of the stages used for transformation are aggregators, transformers, and lookups. The delivered jobs read data from the PeopleSoft transaction systems (source) and load data into the SIM Staging tables (target). If you want to use non-PeopleSoft sources or make changes to the jobs to meet your business requirements, you have to reconfigure the delivered jobs using the Ascential DataStage tool.

Stages and Transforms

Stages and Transforms are DataStage Project objects used by jobs to extract and transform your source data. They are the foundation on which the extract and transform process is built. Stages describe the flow of data from a data source to a data target (e.g. the SIM staging tables). Stages are either passive or active. A passive stage handles access to databases for the extraction or writing of data. Active stages model the flow of data and provide mechanisms for combining data streams, aggregating data, and converting data from one data type to another. There are five types of stages in the repository: Database, File, PlugIn, Processing, and Real Time. Transforms specify the type of data transformed, the type it is transformed into, and the expression that performs the transformation. Some of the transforms in the repository include String, Date, Data Type, Measurement, and Numeric.

Job Sequencers

You load ETL jobs using job sequencers. A *job sequencer* enables you to specify a sequence of server jobs or parallel jobs to run. It acts as a control, regulating and running other jobs. A *job batch* is a group of jobs or job sequencers that you can run sequentially or in parallel.

PeopleSoft delivers job sequencers that load your ETL jobs.

Types of ETL Jobs

This table describes the ETL job type for loading the SIM staging tables:

ETL Job Type	Description
Incremental load job	The incremental load job inserts new rows from the source record and updates the existing rows.

Configuration of ETL Jobs

To help you understand or configure ETL jobs, PeopleSoft provides a SIM data model showing the structure of the Sales Incentive Management tables.

You can download the SIM data model from Customer Connection. Log on to Customer Connection and navigate to Support, Documentation, Data Models. You will find it under Sales Incentive Management.

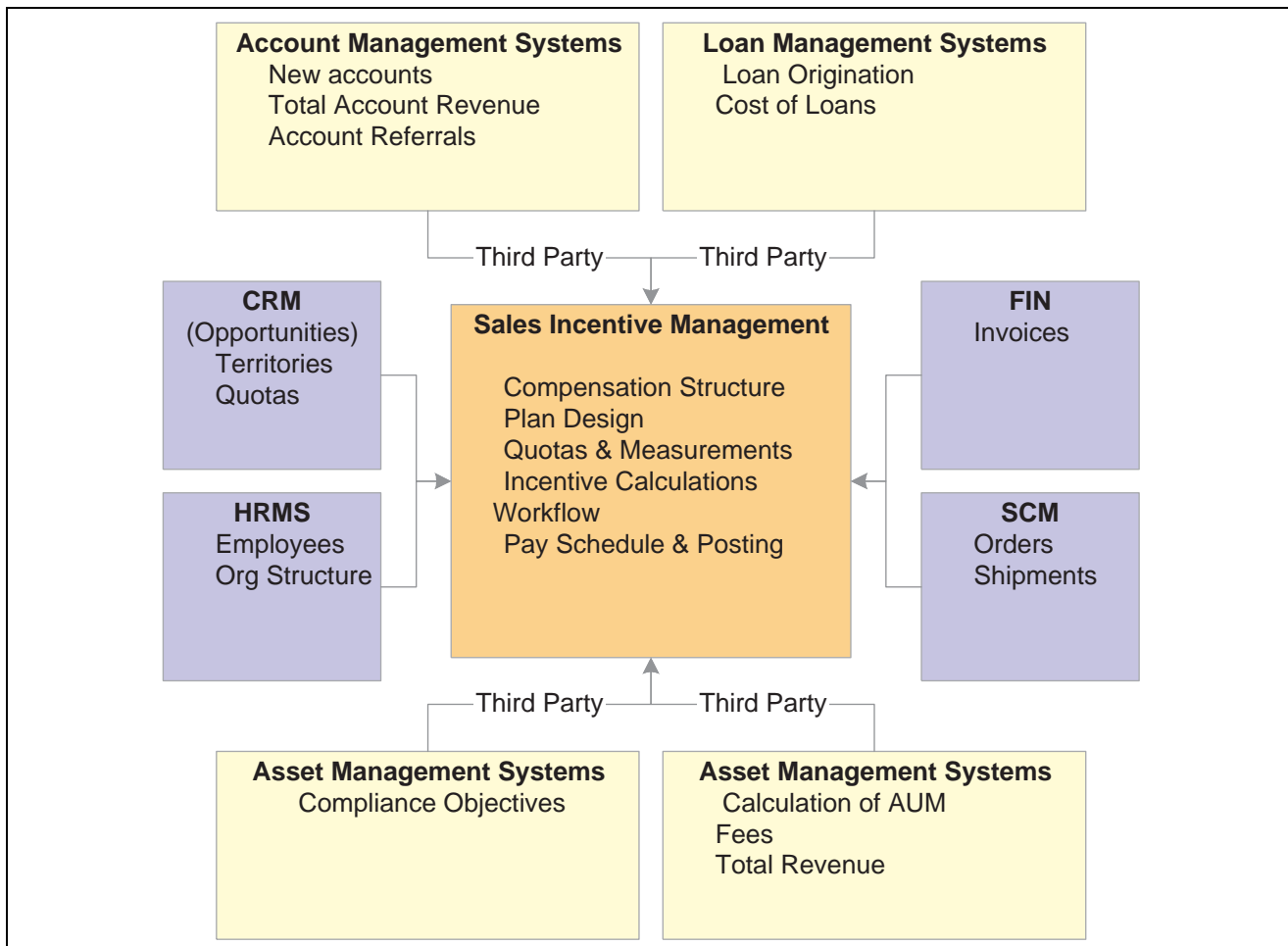
See *Ascential DataStage Designer Guide* for details about configuring jobs.

Loading Data from Source Systems to Staging Tables

This section provides an overview of data load staging, lists prerequisites, and discusses how to import source data into the SIM staging tables.

Understanding Staging Data Load

A major feature of Sales Incentive Management is the ability to accept business data from external sources, as illustrated in the following diagram. You can import source data into Sales Incentive Management from PeopleSoft Enterprise Customer Relationship Management (CRM), Human Resource Management Solutions (HRMS), Financials/SCM (Financials/Supply Chain Management), and non-PeopleSoft applications. These sources provide both reference data (such as employee and customer names) and transaction data (such as order and account information).



Viewing SIM data loading integration

To import existing reference, participant, and transaction data from the source systems into Sales Incentive Management, use Ascential DataStage ETL jobs to import the data into the SIM staging tables. The SIM staging tables are where you maintain the structure of the imported source data.

The Ascential DataStage jobs load data from the source system into the SIM staging tables, transforming the data into SIM staging format and mapping the data into the staging tables. When the jobs load the data from the source tables into the SIM staging tables, they preserve the structures and hierarchies of the source system data. The staging tables correspond with the objects in the SIM object model.

Sales Incentive Management delivers all the Ascential DataStage ETL tool, the ETL jobs, and staging tables that you need to import data from PeopleSoft Enterprise CRM, HRMS, and Financials/SCM (Financials/Supply Chain Management) databases.

The delivered Ascential DataStage ETL jobs are configured to import data only from PeopleSoft application databases. If you are importing source data from third-party applications, you must create your own customized ETL jobs to transfer data from your source system to the SIM staging tables.

Note. If you require additional data not included in the delivered ETL jobs and staging tables (for example, if you have customized your participant or product tables and the customized data is necessary for processing incentives), you must create new staging tables to populate data from, new ETL jobs to populate the staging tables.

See *Ascential DataStage Documentation* for details on how to use Ascential DataStage and configure ETL jobs for your needs.

The steps for loading source data from PeopleTools tree tables to SIM staging tables differ from the steps to load other source data. For source data from PeopleTools tree tables (compensation structures), the Sales Incentive Management uses custom code (SIM Tree Loader Application Engine process) to enrich and transfer data from the source tables to the SIM staging tables.

See [Chapter 9, “Loading Data,” Loading Trees from PeopleTools to Staging Tables, page 201](#).

Once you’ve imported the source data into the SIM staging tables, you are ready to load data from the staging tables to the production tables.

Prerequisites

Prior to importing data from source systems, ensure that you have completed business unit mapping using the Source Unit Mapper page. Also run the appropriate processes in their source system, as necessary, to update the data.

Before you can use Ascential DataStage for loading data into the SIM staging tables, you must:

- Review the hardware and software requirements for Sales Incentive Management and Ascential.

See *PeopleTools Hardware and Software Requirements*, Appendix B.

- Complete installation and configuration of Ascential DataStage.

See *DataStage Install and Upgrade Guide*.

See *PeopleSoft Enterprise Sales Incentive Management 8.9 Installation Guide*, chapter 2, “Installing Ascential.”

You can download the installation guide for your database platform by logging on to Customer Connection and navigating to Implement, Optimize + Upgrade, Implementation Guide, Installation Guides and Notes. Search under Sales Incentive Management.

See Also

[Chapter 3, “Defining Sales Incentive Management General Options,” Defining Business Unit Options, page 39](#)

[Chapter 9, “Loading Data,” Understanding Data Acquisition Through Ascential DataStage, page 193](#)

Loading Source Data

Use Ascential DataStage ETL jobs to import the source data into the SIM staging tables.

The following are common parameters to all jobs and are inherited from the project Environment Variables. These can be overridden by the user at the time of running the job sequence:

- Source DataBase Name
- Type Source DataBase
- Source UserID
- Source Password
- Target DataBase Type
- Target DataBase Name
- Target UserID
- Target Password

The following tables lists the delivered Ascential DataStage jobs from PeopleSoft Enterprise CRM 8.9, HCM 8.9, and FDM 8.8 databases to Sales Incentive Management:

Job Sequence Name	Functional Description	Input Parameters
CRM890_BUSUNITBLRSF_BUSUNITBLRSF_Sequence	CRM Business Units	Not applicable
CRM890_RBCUSTOMER_EIBOCUSTSTG_Sequence	Customer Business Object	Not applicable
CRM890_RBPERSON_EIPCPNPERSSTG_Sequence	CRM Person	As Of Date
CRM890_RSFindustry_EIBOINDSTG_Sequence	Industry Business Object	As Of Date SETID
CRM890_RSfroleCD_TBleIEIROLESTG_Sequence	Roles	Not applicable
CRM890_RSFSUSERQUOTA_EIVARIABLESTG_Sequence	User Quotas - Variables	Not applicable
CRM890_RSfTEAM_EIPCNGRPSTG_Sequence	Participant Group	As Of Date SETID
CRM890_RSfTEAMMBRS_EIPCGRPMEMSTG_Sequence	Participant Group Members	As Of Date SETID
CRM890_RSfTERRITORY_EICOMPSTRSTGNODE_Sequence	Territory - Node	As Of Date
CRM890_RSfTERRITORY_EICOMPSTRSTGROOT_Sequence	Territory - Root	As Of Date
CRM890_RSfTRCUSTOMER_EICSTRCHLDSTG_Sequence	Customer Compensation Structure Associations	Not applicable
CRM890_RSfTRINDUSTRY_EICSTRCHLDSTG_Sequence	Industry Compensation Structure Associations	Not applicable

Job Sequence Name	Functional Description	Input Parameters
CRM890_RSFTTRPRODUCT_EICSTRCHLDSTG_Sequence	Product Compensation Structure Associations	Not applicable
CRM890_RSFTTRREGION_EIBOGHOSTG_Sequence	Geography	As Of Date SETID
CRM890_RSFTTRREGION_EICSTRCHLDSTG_Sequence	Region Compensation Structure Associations	Not applicable
CRM890_RSFTTRTEAM_EICSTRCHLDSTG_Sequence	Participant Compensation Structure Associations	Not applicable
HCM890BUSUNITTBLHRBUSUNITTBLHR_Sequence	HR Business Unit	Not applicable
HCM890_DEPTTBL_EICOMPSTRSTG_Sequence	HR Departments	SETID Business Unit
HCM890_JOB_EICSTRCHLDSTG_Sequence	Employee Job Information	Not applicable
HCM890_PERSON_EIPCPNPERSSTG_Sequence	Person data to Participant	As Of Date SETID
SCM880_BILINE_EITOBASESTG_Sequence SETID	Invoice transactions	As Of Date Param_Seq_ClassID Param_Seq_Name Param_TreeName Param_ClassID
SCM880_BUSUNITTBLBI_BUSUNITTBLBI_Sequence	Financials Business Unit loading	Not applicable
SCM880_CUSTDATA_EITOBASESTG_Sequence	Payment Transactions	As Of Date SETID Param_Seq_ClassID Param_Seq_Name Param_TreeName Param_ClassID
SCM880_CUSTGROUPTBL_EIBOGRPSTG_Sequence	Customer Reference Groups	Not applicable
SCM880_CUSTCGRPLNK_EIBOGRPMEMSTG_Sequence	Customer Reference Group Members	Not applicable

Job Sequence Name	Functional Description	Input Parameters
SCM880_ORDLINE_EITOBASESTG_Sequence	Order transactions	As Of Date Param_Seq_ClassID Param_Seq_Name Param_TreeName Param_ClassID
SCM880_ORDSOURCECD_EIBOCHANLSTG_Sequence	Channel Business Object	Not applicable
SCM880_PRODGROUPTBL_EIBOGRPSTG_Sequence	Product Reference Groups	Not applicable
SCM880_PRODPGRPLNK_EIBOGRPMEMSTG_Sequence	Product Reference Group Members	As Of Date
SCM880_PRODITEM_EIBOPRODSTG_Sequence	Products Business Object	Not applicable
SCM880_SHIPINFINV_EITOBASESTG_Sequence	Shipping Transactions	As Of Date Param_Seq_ClassID Param_Seq_Name Param_TreeName Param_ClassID

See Also

[Chapter 9, “Loading Data,” Understanding Data Acquisition Through Ascential DataStage, page 193](#)

Loading Trees from PeopleTools to Staging Tables

For tree data, the SIM Data Loading process uses custom code (SIM Tree Loader Application Engine process) to enrich and transfer data from the PeopleTools tree tables to the SIM staging tables.

To load tree data from the PeopleTools tables to SIM staging tables:

1. Define a staging definition on the Define Staging Parameters page. Staging definitions define the parameters for loading tree data from PeopleTools tables to staging tables.

You'll use these staging definitions when creating step IDs that load data into staging tables on the Step Definition page.

See [Chapter 7, “Setting Up Engine Processing,” Defining Staging Definition Parameters, page 152.](#)

2. Create a step definition and assign the staging definition to this step definition on the Step Definition page.

Select the appropriate process job, which in this case is the EI_STLOD job. The job is pre-configured to run the correct engine processes when loading staged data to the production tables. The job loads data from the PeopleTools tree tables to SIM staging tables. Select the Stage Load check box, and specify the Staging Definition for this step ID.

See [Chapter 7, “Setting Up Engine Processing,” Defining Process Steps, page 159.](#)

3. Create a new job to load data from PeopleTools tree tables to the SIM staging tables on the Define Job page.

Select the This job loads data check box. Specify the step IDs for the step definitions that you created for this data load.

See [Chapter 18, “Processing Incentive Transactions,” page 367.](#)

See [Chapter 7, “Setting Up Engine Processing,” Reviewing Delivered SIM Job Definition Data, page 170.](#)

4. Schedule, run, and monitor the job.

Create a schedule definition on the Schedule Jobs page for the job that you just defined. When you are scheduling jobs that only include data load steps, the date criteria is not relevant. Enter the step definition from which you want to start the run of the job, then run the job. The EI_STLOD job runs two processes: EI_MASTER and EI_STLOD. During the process, the EI_MASTER acts as a gatekeeper, invoking the work engine EI_STLOD to perform the actual load process. The EI_STLOD process loads the tree data from PeopleTools tree tables to SIM staging tables. The EIM logging mechanism logs any messages generated during an EIM engine run. You can view and access these messages using the View Details link on the Monitor Jobs page.

See [Chapter 18, “Processing Incentive Transactions,” page 367.](#)

Loading Reference and Participant Data from Staging Tables to Production Tables

Loading staged reference and participant data to the SIM production tables is the final data loading process prior to the actual processing of incentives. The production tables store the actual reference and participant data that you use to build the compensation structures, which you then use for incentive calculation. As such, you want this data to be accurate to prevent calculation errors. To facilitate this, SIM contains various features and functionality to help ensure production-worthy data.

The SIM staging tables are the starting point for the reference objects stage loading process. They consist of all objects defined as staging object classes in metadata, and each staging class corresponds to one or more production classes. The staging tables basically serve as a temporary holding place for the data prior to transfer to the production tables.

The delivered Reference Stage Loading Application Engine process works with the EIM Engine process. You first configure load definitions, step definitions, and job definitions to load the reference data. During engine processing, rows of staged reference data are transferred from their specific staged object class to the corresponding production object class. If the staged data row successfully loads, the data is deleted from the staging tables, and resides only on the production tables. If the load is not successful, that row of data is written to the stage error class and is viewable on an Error Message page. From this page, you can navigate to the corresponding - Staged page to correct the specific reference data row error and mark the row for reprocessing.

Important! You can only correct errors that cause data to fail the Reference Stage Loading AE process. You cannot use these pages to correct data prior to running this process.

To load reference and participant data from staging tables to production tables:

1. Define objects included in a load definition using the Configure Load Steps page.

Load definitions are associated with job steps of a *Load* attribute, which are used to load objects from the SIM Staging tables to SIM Production tables.

See [Chapter 7, “Setting Up Engine Processing,” Configuring Load Definitions, page 153.](#)

2. Create a step definition and assign a load definition. Select the appropriate a job ID based on the type of data you are loading, either *Load Objects from Stage tbls (EI_OBJLDD)* to load reference and participants objects, or *Load Comp Objects from Stage (EI_COBJSD)* to load compensation structure and tree data.

These delivered job IDs are pre-configured to run the correct engine processes when loading staged data to the production tables. Select the Load Step check box and specify the load definition for this step ID. PeopleSoft delivers step definitions and load definitions for all delivered objects.

See [Chapter 7, “Setting Up Engine Processing,” Defining Process Steps, page 159.](#)

3. Run the loading process using the Define Jobs, Schedule Jobs, and Monitor Jobs pages.

During the process, the EI_MASTER process acts as a “gatekeeper,” invoking the “work” engine that performs the actual load process. This work engine loads the objects from the EIM Staging tables to EIM Production tables.

After you have configured step definitions with load object attributes, you configure and run an EIM Engine Job to load the objects to the production tables.

On the Define Jobs page, select the This job loads data check box. You can also define a batching query for data loading jobs. Select a previously defined query that points to the staging class associated with the step. This query criteria is used by the Reference Stage Load AE for further filtering on the stage data.

On the Schedule Jobs page, you use the basic criteria page with all the default date criteria information. When you are scheduling jobs that only include data load steps, the date criteria is not relevant.

The objects processed by the Reference Stage Load AE is determined by your tables’ key structure and the business unit specified on the Job Definition page. For example, if your tables are keyed by BUSINESS_UNIT, and you define a Job Definition with a Business Unit of *Corp*, the system only processes those rows of data with a business unit of *Corp*. However, if your tables are keyed by setID, the system first identifies the associated setIDs for the business unit specified for the job definition. It then processes only the associated setIDs’ data rows.

Also, the EIM Logging Mechanism logs any messages generated during an EIM engine run. You can view and access these messages using the View Details link on the Monitor Jobs page.

Note. You can also use the Define Jobs page to configure load order for load definitions having logical dependencies. However, Sales Incentive Management recommends using the Configure Load Steps page for these types of load definitions.

See [Chapter 18, “Processing Incentive Transactions,” page 367.](#)

See [Chapter 7, “Setting Up Engine Processing,” Reviewing Delivered SIM Job Definition Data, page 170.](#)

4. Once the run process is complete, you can review any load error messages (on the Error Message pages) and correct these errors (on the various - Staged pages).

You can also use Query Builder to query for loading errors—but errors can only be corrected on the various - Staged pages.

See [Chapter 9, “Loading Data,” Viewing Error Messages for Stage-to-Production Data Load, page 204.](#)

See [Chapter 19, “Using Query Builder,” page 425](#).

5. Objects that do not successfully load are kept on the EIM Staging tables.

After correcting all objects' loading errors, rerun the process to push the corrected object reference data from the EIM Staging tables to the EIM Production tables.

See [Chapter 9, “Loading Data,” Correcting Errors Using the - Staged Pages, page 209](#).

The staging tables do not store source data. Once you load the data from stage to production, the valid data exists only in the production tables. There is no historical version of the data.

Viewing Error Messages for Stage-to-Production Data Load

To view error messages, use the following components: Reference Data (EI_BO_ERRMSG), Reference Groups (EI_BOGRP_ERRMSG), Reference Group Members (EI_BOMEM_ERRMSG), Participant Data (EI_PCPN_ERRMSG), Participant Group Error Mesgs (EI_PCGRP_ERRMSG), Participant Group Members (EI_PCMEM_ERRMSG), Roles (EI_EI_ROLE_ERRMSG), Compensation Structure (EI_CSTR_ERRMSG), and Variables (EI_VARIABLE_MSG).

Use the following component interfaces to load data into the tables for these components: EI_BO_MSG_CI, EI_BOGRP_ERRMSG_CI, EI_BOMEM_ERRMSG_CI, EI_PCPN_MSG_CI, EI_CSTR_ERRMSG_CI, EI_PCGRP_ERRMSG_CI, EI_PCMEM_ERRMSG_CI, EI_EI_ROLEMSG_CI, and EI_VARIABLE_ERRMSG_CI.

This section discusses how to view error messages.

The various Error Messages pages are inquiry pages, enabling you to view rows of error information for a particular object that occurred while loading data from the staging tables to the production tables. From each error message page, you can also access the corresponding - Staged page to correct the error and mark the row for reprocessing.

See Also

[Chapter 9, “Loading Data,” Correcting Errors Using the - Staged Pages, page 209](#)

Pages Used to View Error Messages

Page Name	Object Name	Navigation	Usage
Reference Error Messages	EI_BO_ERRMSG	Compensation, Sales Incentives, Manage Source Data, Staging Errors, Reference Data	View error messages for reference source data.
Reference Group Error Messages	EI_BOGRP_ERRMSG	Compensation, Sales Incentives, Manage Source Data, Staging Errors, Reference Groups	View error messages for grouped reference source data.
Reference Group Member Error Messages	EI_BOGRPMEM_ERRMSG	Compensation, Sales Incentives, Manage Source Data, Staging Errors, Reference Group Members	View error messages related to loading reference group member source data.
Participant Error Message	EI_PCPN_ERRMSG	Compensation, Sales Incentives, Manage Source Data, Staging Errors, Participant Data	View error messages for participant source data.
Participant Group Error Messages	EI_PCGRP_ERRMSG	Compensation, Sales Incentives, Manage Source Data, Participant Group Error Msgs	View error messages for grouped participant source data.
Participant Group Member Error Messages	EI_PCGRPMEM_ERRMSG	Compensation, Sales Incentives, Manage Source Data, Staging Errors, Participant Group Members	View error messages related to loading participant group member source data.
Role Error Message,	EI_EI_ROLE_ERRMSG	Compensation, Sales Incentives, Manage Source Data, Staging Errors, Roles	View error messages for role source data.
Comp Structure Error Messages	EI_CSTR_ERRMSG	Compensation, Sales Incentives, Manage Source Data, Staging Errors, Compensation Structure	View error messages for compensation structure reference source data.
Variable Error Messages,	EI_VAR_ERRMSG	Compensation, Sales Incentives, Manage Source Data, Staging Errors, Variables	View error messages for variable source data.

Viewing Error Messages

Access the appropriate error message page.

Edit this Item

Click this link to access the corresponding - Staged page to correct the error.

Last Upd User (last updated user) or **Last Updated User ID**

Displays the user ID of the last user to modify the data.

Last Upd DtTm (last updated date time) or Last Update Date/Time	Displays the date and time that the source object was last updated in the source system.
Load Date/Time or Load Date and Time	Displays the date and time the engine attempted to load the source objects from the EIM staging tables to the EIM production tables.
Message Sequence	Displays the Message Sequence number for this error. You can view this message by clicking the Process Monitor link on the Monitor Jobs page. On the Process List page, click a details link for a job instance. Then on the Process Detail page, click the Message Log link.
Processing Action	Indicates whether the row was a data insert or a data update that failed.
Processing Status	Indicates the outcome of the processing action performed. Values are <i>Error</i> and <i>Ready</i> .

Correcting Errors for Staged Reference and Participant Data

To correct errors for staged reference and participant data, use the following components: Accounts - Staged (EI_BO_BACT_STG), Broker Licenses - Staged (EI_BC_BLIC_STG), Customers - Staged (EI_BO_CUSTOMER_STG), Customers (Banking) - Staged (EI_BO_BCUS_STG), Channels - Staged (EI_BO_CHANNEL_STG), Products - Staged (EI_BO_PROD_STG), Products (Banking) - Staged (EI_BO_BPRD_STG), Industries - Staged (EI_BO_INDUSTRY_STG), Work Hours - Staged (EI_BC_WKHR_STG), Geographies - Staged (EI_BO_GEOG_STG), Acct Groups - Staged (EI_BO_BAGO_STG), Packages - Staged (EI_BO_BPKG_STG), Reference Groups (EI_BOGRP_STG), Reference Grp Members (Group) (EI_BOGRPGRP_STG), Reference Grp Members (Indiv) (EI_BOGRPMEM_STG), Participants (EI_PCPNPERS_STG), Participant Groups (EI_PCPNGRP_STG), Partic Group Members (Group) (EI_PCGRPGRP_STG), Partic Group Members (Indiv) (EI_PCGRPMEM_STG), Roles (EI_EI_ROLE_STG), Compensation Structure Nodes (EI_COMPSTR_STG), Comp Structure Relationships (EI_COBJ_RELTN_STG), and Variables (EI_VARIABLE_STG).

This section discusses how to correct errors using the - Staged pages.

Pages Used to Correct Errors for Staged Reference and Participant Data

Page Name	Object Name	Navigation	Usage
Accounts - Staged	EI_BO_BACT_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Accounts	Review and correct errors for account data in the staging table so that the data is ready for loading to the corresponding production table.
Broker License - Staged	EI_BC_BLIC_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Broker Licenses	Review and correct errors for broker license data in the staging table so that the data is ready for loading to the corresponding production table.

Page Name	Object Name	Navigation	Usage
Customers - Staged	EI_BO_CUSTOMER_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Customers	Review and correct errors for customer data in the staging table so that the data is ready for loading to the corresponding production table.
Banking Customers - Staged	EI_BO_BCUS_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data,	Review and correct errors for customer data in the staging table so that the data is ready for loading to the corresponding production table.
Channels - Staged	EI_BO_CHANNEL_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Channels	Review and correct errors for channel data in the staging table so that the data is ready for loading to the corresponding production table.
Products - Staged	EI_BO_PROD_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Products	Review and correct errors for product data in the staging table so that the data is ready for loading to the corresponding production table.
Banking Products - Staged	EI_BO_BPRD_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Products (Banking)	Review and correct errors for product data in the staging table so that the data is ready for loading to the corresponding production table.
Industries - Staged	EI_BO_INDUSTRY_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Industries	Review and correct errors for industry data in the staging table so that the data is ready for loading to the corresponding production table.
Work Hours - Staged	EI_BC_WKHR_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Work Hours	Review and correct errors for work hours data in the staging table so that the data is ready for loading to the corresponding production table.
Geographies - Staged	EI_BO_GEOG_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Geographies	Review and correct errors for geography data in the staging table so that the data is ready for loading to the corresponding production table.

Page Name	Object Name	Navigation	Usage
Account Groups - Staged	EI_BO_BAGO_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Account Group	Review and correct errors for account groups in the staging table so that the data is ready for loading to the corresponding production table.
Packages - Staged	EI_BO_BPKG_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Packages	Review and correct errors for package definitions in the staging table so that the data is ready for loading to the corresponding production table.
Reference Groups - Staged	EI_BOGRP_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Reference Groups - Staged	Review and correct errors for reference groups in the staging table so that the data is ready for loading to the corresponding production table. Reference groups include customer groups, account groups, geography groups, industry groups, and channel groups.
Reference Group Members (Groups) - Staged	EI_BOGRPGRP_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Reference Grp Members (Groups)	Review and correct errors for reference group members (groups) in the staging table so that the data is ready for loading to the corresponding production table.
Reference Group Members (Individuals) - Staged	EI_BOGRPMEM_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Reference Grp Members (Indiv)	Review and correct errors for reference group members (individuals) in the staging table so that the data is ready for loading to the corresponding production table.
Participants - Staged	EI_PCPNPERS_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Participants	Review and correct errors for participant data in the staging table so that the data is ready for loading to the corresponding production table.
Participant Groups - Staged	EI_PCNGRP_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Participant Groups	Review and correct errors for participant groups in the staging table so that the data is ready for loading to the corresponding production table.

Page Name	Object Name	Navigation	Usage
Participants Group Members (Groups) - Staged	EI_PCGRPGRP_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Participant Group Members (Groups)	Review and correct errors for participant group members (groups) in the staging table so that the data is ready for loading to the corresponding production table.
Participant Group Members (Individuals) - Staged	EI_PCGRPMEM_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Participant Group Members (Indiv)	Review and correct errors for participant group members (individuals) in the staging table so that the data is ready for loading to the corresponding production table.
Roles - Staged	EI_EI_ROLE_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Roles	Review and correct errors for role data in the staging table so that the data is ready for loading to the corresponding production table.
Compensation Structure Nodes - Staged	EI_COMPSTR_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Compensation Structure Nodes	Review and correct errors for compensation structure nodes in the staging table so that the data is ready for loading to the corresponding production table.
Compensation Structure Relationships - Staged	EI_COBJ_RELTN_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Compensation Structure Relationships	Review and correct errors for compensation structure relationships in the staging table so that the data is ready for loading to the corresponding production table.
Variables - Staged	EI_VARIABLE_STG	Compensation, Sales Incentives, Manage Source Data, Reference and Participant Data, Variables	Review and correct errors for variable data in the staging table so that the data is ready for loading to the corresponding production table.

Correcting Errors Using the - Staged Pages

Access the appropriate - Staged page.

Correct the necessary information on the - Staged page, then click the Mark for Reprocessing button. This changes the status of the data row on the corresponding SIM staging table, enabling you to reprocess the data row.

Reprocessing Corrected Errors for Staged Reference and Participant Data

The Reference Stage Loading Application Engine process marks as errors any source reference and participant data that is unsuccessfully loaded from staging tables to production tables and retains this data in the staging tables. Use the Error Messages pages to locate the errors, then click the Edit this Item link on the Error Messages page to access the erroneous data in the - Staged pages. Rectify the error, then rerun the Reference Stage Loading Application Engine process again to transfer the corrected reference and participant data to production.

See Also

Chapter 9, “Loading Data,” Loading Reference and Participant Data from Staging Tables to Production Tables, page 202

Managing Staged Transaction Data

Once you have loaded transaction data into the appropriate staging tables, the data is now ready to use in your Sales Incentive Management system. Use the transaction staging pages to view and update transaction data that you have loaded into the staging tables. You can also use the transaction staging pages to manually add new transactions.

To move transaction data from staging to production, you must perform allocation processing. To allocate transaction data to the appropriate participants:

1. Specify transaction allocation rules in your configuration plans and incentive plans so that the EIM Engine knows how to allocate the transactions.
2. Create job definitions and job schedules to run the plan that contains the transaction allocation rules.

Based on the transaction allocation rules in the plan, the compensation tree specified for the transaction, and the participants on the compensation structure, the process allocates the transaction data in the staging tables to the appropriate participants.

The PeopleBooks for the specific market templates discuss in detail how to use the transaction staging user interface pages.

See Also

PeopleSoft Enterprise Sales Incentive Management for Banking and Capital Markets 8.9 PeopleBook, “Managing BCM Transactions”

PeopleSoft Enterprise Sales Incentive Management for High Tech and Industrial 8.9 PeopleBook, “Managing HTI Order Transactions,” Pages Used to Manage Order Transactions

CHAPTER 10

Managing Reference and Participant Objects

This chapter provides an overview of reference and participant objects and discusses how to:

- Manage sales participants.
- Manage customers.
- Manage customers (banking).
- Manage products.
- Manage products (banking).
- Manage geographies.
- Manage industries.
- Manage channels.
- Create numeric ranges.
- Manage accounts.
- Manage account groups.
- Manage packages.
- Manage work hours.
- Manage broker licenses.
- Manage packages.
- Create participant groups.
- Create reference groups.
- Review participant groups or reference groups.

See Also

Chapter 13, “Working with Compensation Structures,” page 289

Understanding Reference and Participant Objects

This section provides a brief overview and describes:

- Reference objects.
- Participant objects.
- Participant groups.

- Reference groups.

Overview

Reference and participant objects allow Sales Incentive Management (SIM) to resolve compensation logic such as plan assignments, approvals, credit rollups, and security access rights by extending the attributes of objects on a compensation structure, enabling transactions to be placed correctly on a compensation structure in order to determine which incentive plans and participants “own” a transaction. Reference and participant objects are associated with nodes on compensation structures via relationships. You can group reference objects into reference groups; you can group participant objects into participant groups.

You can import reference and participant objects from external source systems, such as PeopleSoft Enterprise Customer Relationship Management (CRM), and update them if required. You can also create new reference and participant objects. You must define metadata for all the reference and participant objects defined in your system on the Object Catalog page (EI_SY_OBJS_PG).

Note. If you import reference objects, the ID of the source system appears on the various reference object system pages if the load process provides this information. The purpose of this field is to track source system IDs that do not map to the EIM_KEY because the source ID is longer than 30 characters in length.

Reference Objects

Sales Incentive Management uses the following reference objects for the SIM product category:

- Geographies.
- Industries.
- Channels.
- Numeric ranges.

Sales Incentive Management provides the following reference objects specific to the High-Tech and Industrial (HTI) market template:

- Customers.
- Products.

Sales Incentive Management provides the following reference objects specific to the Banking and Capital Markets (BCM) template:

- Customers (banking).
- Products (banking).
- Accounts.
- Work hours.
- Broker licenses.
- Account groups.
- Packages.

Participant Objects

A participant object is usually any payable entity that participates in the incentive management process and is a recipient of that process. For example, an employee or a store that receives incentive compensation is a payable entity. Nonpayable entities might include such entities such as non-employees, organizations, partners, and so on. A compensation administrator who participates in the incentive management process but does not receive incentive compensation arising from that process is a non-payable entity—a participant does not necessarily have to receive compensation as a result of the incentive process to be considered a participant.

In Sales Incentive Management, a participant is an employee who is either a salesperson paid commission or a sales manager responsible for managing sales personnel.

Participants are associated with nodes on compensation structures by using a participant relationship.

Sometimes positions on a compensation structure are vacant. To accommodate this situation, Sales Incentive Management enables you to create vacant participants, which act as placeholders—“dummy” participants, if you will—until the time the position is filled. Vacant participants enable the system to process rollups and attainments during the time the position is vacant. Payments are not posted to the SIM ledger for vacant participants.

Warning! A vacant participant is a special type of participant created during setup. Don’t change a valid existing participant to a vacant participant. Doing so may cause incentive processing problems.

Participant Groups

Sales Incentive Management enables you to group participants into participant groups to make it easier to manage them. You can define a participant group and then associate it with nodes on your compensation structure via the participant relationship. For example, you might create a group of salespeople called Telesales and then associate the group with the sales organization node related to their sales territory.

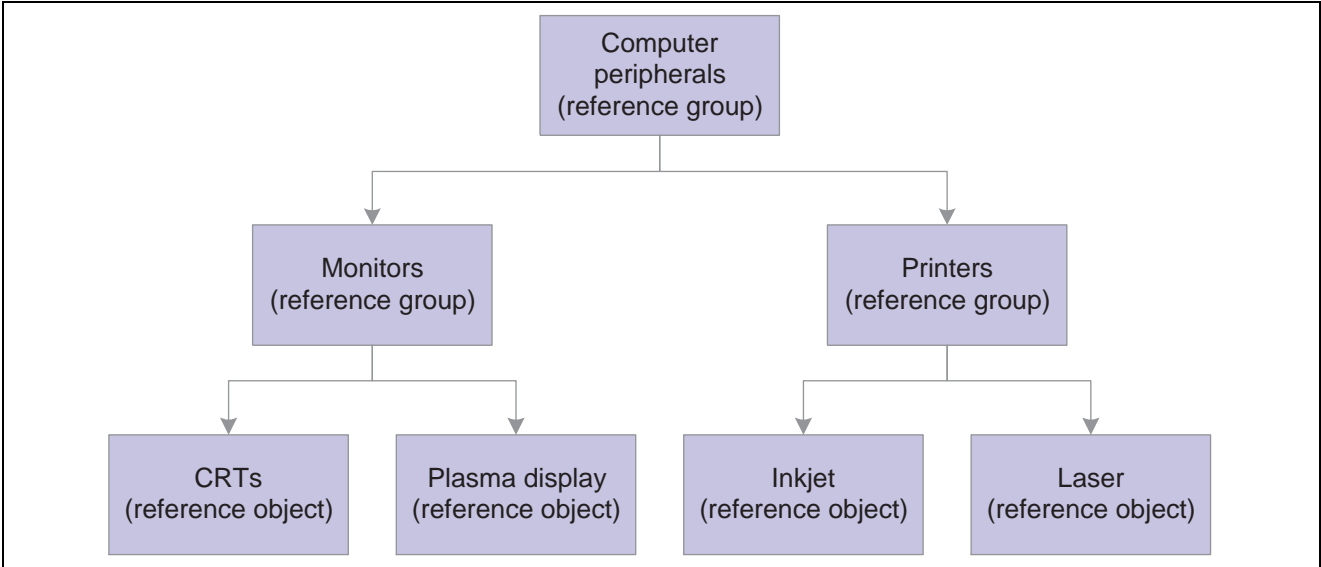
One participant can be in multiple participant groups. A single participant group can combine individual participants and participant groups.

During processing, participant groups “explode” into their individual reference object members. If a participant group is associated with a compensation node, any changes that are made to the group membership are recognized by the compensation structure node.

Reference Groups

Similar to participant groups, a reference group can contain another reference group (or groups) to form a hierarchy of reference groups. One reference object can be in more than one group. A single reference group can combine individual reference objects and reference groups, as long as the objects are all of the same type (for example, individual customer reference objects and groups of customer reference objects).

Reference objects, like participant objects, can also have their own hierarchy. For example, you can have a product tree hierarchy whose root node is Computer Peripherals, with lower branches differentiating between different types of computer-related products. For example:



Reference group example

Managing Sales Participants

To manage sales participants, use the Sales Participants (EI_SI_PARTICIPANTS) component. Use the EI_SI_PARTICIPANT_CI component interface to load data into the tables for this component.

This section discusses how to manage sales participants.

Page Used to Manage Sales Participants

Page Name	Object Name	Navigation	Usage
Maintain Sales Person	EI_SI_PARTICIPANT	Compensation, Sales Incentives, Define Sales Org Structure, Sales Participants	Add or update a sales participant. Participants are associated with the Person (PERS) object derived class, which is a derived class object of the participant object base class (PCPN).


Managing Sales Participants


Access the Maintain Sales Person page.


Maintain Sales Person


SetID SHARE **Participant ID** KU0051


Details Find | View All First 1 of 1 Last

***Effective Date** 01/01/2001  + -


Status Active  ☐ **Vacant Participant** ☒ **Active Flag** ☐ **Hold Pay**

***Payment Currency** USD  US Dollar


Payment System NAPY 

User ID TMURPHY 


***Name** Murphy, Terry




***Personnel Status** Employee 

Sales Person Details

Sales User Type Field Rep  **Person ID**



Employee Data



EmplID KU0051 **Empl Rcd#** **Employee Status** Active 



Action  **Reason Code**  **Action Date** 

Title

Job Detail

Job Code KU057  Sales Representative **Job Entry Date** 

Department  **Department Entry Date** 

Business Unit GBIBU  **Compensation Frequency** 

Comp Rate

Cost Center

Maintain Sales Person page (1 of 2)

Contact Details

Address Line 1 123 East 59th Avenue **Address 2** Apt. 10E

City New York

Country USA  **State** NY 

Telephone **Phone Type** Business 

Email Address eim_sls_rep@hotmail.com

* Required Field

Maintain Sales Person page (2 of 2)

Usually you'll load your participant data from an external system, either PeopleSoft Enterprise CRM or Human Resources Management System (HRMS) and won't normally add new participants directly into Sales Incentive Management. However, you can use this page to enter participants if you need to.

Details

Vacant Participant	Select this check box <i>only</i> if you are creating a vacant participant for a vacant position. Except for the required fields, you don't need to enter data if you select this check box. Don't select this check box for a valid participant—doing so may cause processing errors.
Active Flag	This check box is selected by default, indicating that the participant may be credited and receive payments.
Hold Pay	Select this check box to hold payments for this participant and prevent posting to the SIM ledger.
Payment Currency	Select a currency for participant payments. This indicates the currency in which payouts will be created.
User ID	Select an ID. The participant uses this ID to log on to the participant UI pages and view results of the incentive calculations.
Personnel Status	Select a status for the participant. Valid values are: <i>Employee</i> : Participant is an employee. This enables the Employee Data section. <i>Non-Employee</i> : Participant is not an employee.

Sales Person Details

The sales person details are relevant only if the data is being maintained in PeopleSoft Enterprise CRM and is exported into Sales Incentive Management.

Sales User Type	Select a user type. Sales user types correspond to user roles. Valid values are: <i>Admin</i> , <i>Executive</i> , <i>Field Rep</i> , <i>Inside Rep</i> , <i>Manager</i> , <i>Pre-Sales</i> , <i>Tech</i> , and <i>Telesales</i> .
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Employee Data

If you selected *Employee* in the Personnel Status field, enter employee data.

EmplID (employee ID)	A unique employee identifier for the participant in PeopleSoft Enterprise HRMS.
Action	Used by Human Resources to indicate a participant-related event (for example, promotion, termination, and so on).
Reason Code	Associated with action code.
Action Date	Date on which action was entered into the system.
Title	Indicates job title.

Job Detail

If you selected *Employee* in the Personnel Status field, enter job detail. You only need to enter data that is required for processing incentives. For example, if job codes are not used within your plans, you can leave this field blank:

Job Code	Select a job code.
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Job Entry Date	Date on which the participant commenced the job.
Department	Select an identification code to represent the organization in which the job occurs.
Department Entry Date	Date on which the participant joined the department.
Business Unit	Select a business unit associated with the department.
Comp Rate (compensation rate)	Enter the compensation rate.
Compensation Frequency	Select a frequency (for example, annually, weekly, or hourly) at which the compensation rate is paid.
Cost Center	Specify the cost center associated with the job. This value is used for tracking employee expenses by cost center in non-PeopleSoft source systems.

Contact Details

(Optional) Specify participant contact details, such as address and email address information.

Managing Customers

To manage customers, use the Customers (EI_BO_CUSTOMER) component. Use the EI_BO_CUSTOMER_CI component interface to load data into the tables for this component.

This section provides an overview of the Customer reference object and discusses how to manage customer information.

Understanding the Customer Reference Object

Customers defined in Sales Incentive Management may be categorized according to industry and (optionally) channel.

Sales models usually address multiple customers. Your sales organization structure should include customers, locations, and subsidiaries to ensure that your sales organization structure contains enough information to resolve sales transactions correctly. The Customer (CUST) object is a derived class object of the EIM reference object base class (ROBJ).

Page Used to Manage Customer Information

Page Name	Object Name	Navigation	Usage
Maintain Customer	EI_BO_CUSTOMER	Compensation, Sales Incentives, Define Sales Org Structure, Customers	Add or update a customer.

Managing Customer Information

Access the Maintain Customer page.

Maintain Customer

SetID SHARE Customer ID 1000

Details Find | View All First 1 of 1 Last

***Effective Date** 01/02/2000

Status Active

***Customer Name** Plant Alliance Group

Customer Status Active

Customer Since 01/02/2000

Taxpayer ID

Sales Rep

Channel ID

Customer Type Other

Employee Total

☒ **Global Account**

Customer Status Date

Currency Code USD

DUNS ID 0

Industry ID Outdoor products

Channel Partner ID

Customer Size Small

Revenue Generated

Address

Country USA **State** CA

Postal Code 95124 **City** San Jose

Telephone

Country Code **Telephone**

Maintain Customer page

Usually you load customers from an external system, such as PeopleSoft Enterprise CRM or Supply Chain Management (SCM), for example. You can use this page to verify the data or enter data directly into the system if you need to.

Note. You only need to enter the data required for processing incentives. For example, if your sales orders are allocated based on customer type, you must enter Customer Type.

Global Account	Select this check box if you need to identify the customer as a “global account” for incentive processing purposes.
Currency Code	Indicate the currency code used for the customer. This code specifies the currency used for a monetary transaction with this company. Currency codes are maintained using the Currency Code page under the Define Sales Incentive Options menu.
DUNS ID (Data Universal Numbering System ID)	Enter the customer Data Universal Numbering System number for Dun and Bradstreet.
Sales Rep (sales representative)	Enter the sales representative associated with this customer. Sales representatives are maintained on the Maintain Sales Person page under the Define Sales Org Structure (define sales organization structure) menu.
Industry ID	Select the identification code of the industry of which the customer is a member. Industries are maintained using the Industries page under the Define Sales Org Structure menu.

Channel ID	Select the identification code of the channel of which the customer is a member. Channels are maintained using the Channels page under the Define Sales Org Structure menu.
Channel Partner ID	Enter the unique identifier for the channel partner that you use to sell to this customer.
Customer Type	Select a customer type, which enables you to identify customer categories for use in your reports. As part of your implementation, you can modify the translate values User 1 - User 4 to reflect categories that make sense for your customer tracking needs. For example, User 1 might represent your manufacturing customers, User 2 your retail customers, and so on.
Customer Size	Select the customer's size. Values are: <i>Small</i> , <i>Medium</i> , and <i>Large</i> . These values are customer defined, and the attributes can be specified in the Transaction Allocation section of the plan template and plan definition pages, as well as Query Builder queries.

Managing Customers (Banking)

To manage banking customers, use the Customers (Banking) (EI_BO_BANKCUSTOMER) component. Use the EI_BO_BANKCUSTOMER_CI component interface to load data into the tables for this component.

This section provides an overview of the BankCustomer reference object and discusses how to manage banking customer information.

Understanding the BankCustomer Reference Object

Banking customers are individuals, high net worth individuals, small businesses, corporate, institution, and government. They are associated with their accounts. The BankCustomer (BCUS) object is a derived class object of the EIM reference object base class (ROBJ) and is specific to the BCM market template.

In the BCM market template, customers are not used in formulas or to calculate incentives. However, customer revenues are needed to calculate new customer acquisition incentives, and add-on customer incentives.

See Also

PeopleSoft Enterprise Sales Incentive Management for Banking and Capital Markets 8.9 PeopleBook, "Understanding Reference Data," Customers (Banking)

Page Used to Manage Customers (Banking)

Page Name	Object Name	Navigation	Usage
Banking Customers	EI_BO_BANKCUSTOMER	Compensation, Sales Incentives, Define Sales Org Structure, Customers (Banking)	Add or update banking customer details.

Managing Banking Customer Information

Access the Banking Customers page.

Note. This page and the Maintain Customer page share common fields.

Contact Fin Spl (contact financial specialist)

Indicate the financial specialist who associates with the particular customer accounts and packages.

See Also

Chapter 10, “Managing Reference and Participant Objects,” Managing Customers, page 217

Managing Products

To manage products, use the Products (EI_BO_PRODUCT) component. Use the EI_BO_PRODUCT_CI component interface to load data into the tables for this component.

This section provides an overview of the Product reference object and discusses how to manage product information.

Understanding the Product Reference Object

You can define products that are sold by your sales organization, including third-party products. You can also associate various attributes with these products. For example, you can associate an individual product with a product category if you have imported a category from an external system, as well as indicate if commission is payable on a product. The Product (PROD) object is a derived class object of the EIM reference object base class (ROBJ).

Page Used to Manage Product Information

Page Name	Object Name	Navigation	Usage
Maintain Product	EI_BO_PRODUCT	Compensation, Sales Incentives, Define Sales Org Structure, Products	Add or update a product.

Managing Product Information

Access the Maintain Product page.

Maintain Product

SetID **SHARE** Product ID **100052**

Details Find | View All First ◀ 1 of 1 ▶ Last

*Effective Date

Status

*Description

Source ID **100052**

☐ Third Party

Product Category

Commissionable

☒ Commissionable Commission %

Maintain Product page

Usually you load your products from an external system, such as PeopleSoft Enterprise CRM or SCM. You can use this page to verify the loaded data or enter data directly if you need to.

Note. You only need to enter the data required for processing incentives. For example, if your sales orders are allocated based on product category, you must enter the product category.

Third Party	Select this check box if the product is a third-party product.
Product Category	If you have imported a product category list from an external system, select the category to which the product belongs.
Commissionable and Commission % (commission percentage)	If the product is commissionable, select the Commissionable check box and enter a Commission % . Use this to track commission at the product level.

Managing Products (Banking)

To manage banking products, use the Products (Banking) (EI_BO_BANKPRODUCT) component. Use the EI_BO_BANKPRODUCT_CI component interface to load data into the tables for this component.

This section provides an overview of the BankProduct reference object and discusses how to manage banking product information.

Understanding the BankProduct Reference Object

Banking products are account based products such as retail banking, loan, and investment accounts. These products are used to calculate incentives for different plans, and are broken into three major lines of business.

The BankProduct (BPRD) object is a derived class object of the EIM reference object base class (ROBJ) and is specific to the BCM market template. It uses the same attributes as the Product (PROD) object derived class, plus a template-specific Minimum Opening Balance attribute, which is used when opening new accounts.

See Also

PeopleSoft Enterprise Sales Incentive Management for Banking and Capital Markets 8.9 PeopleBook, “Understanding Reference Data,” Customers (Banking)

Page Used to Manage Products (Banking)

Page Name	Object Name	Navigation	Usage
Banking Products	EI_BO_BANKPRODUCT	Compensation, Sales Incentives, Define Sales Org Structure, Products (Banking)	Add or update a banking product.

Managing Banking Product Information

Access the Banking Products page.

Note. This page and the Maintain Product page share common fields.

Minimum Opening Balance Enter the minimum balance necessary to open an account for the product.

See Also

Chapter 10, “Managing Reference and Participant Objects,” Managing Customers, page 217

Managing Geographies

To manage geographies, use the Geographies (EI_BO_GEOGRAPHY) component. Use the EI_BO_GEOGRAPHY_CI component interface to load data into the tables for this component.

This section provides an overview of the Geography reference object and discusses how to manage geography information.

Understanding the Geography Reference Object

Sales Incentive Management uses geography as a reference object, which can be further defined by sales region (from PeopleSoft Enterprise CRM), postal codes, telephone area codes, and so on. The Geography (GEOG) object is a derived class object of the EIM reference object base class (ROBJ).

If you import existing geography information from PeopleSoft Enterprise CRM, only sales region geography information is mapped from your CRM territories. After importing your geography information, you can modify your data as required to include postal codes, cities, and so on.

Page Used to Manage Geography Information

Page Name	Object Name	Navigation	Usage
Maintain Geography	EI_BO_GEOGRAPHY	Compensation, Sales Incentives, Define Sales Org Structure, Geographies	Add or update a geography.

Managing Geography Information

Access the Maintain Geography page.

Maintain Geography

SetID SHARE **Geography ID** AZ

Details Find | View All First 1 of 1 Last

*Effective Date 01/01/1900

Status Active

*Description Arizona

*Geography Type State

State

Country USA United States State AZ Arizona

Maintain Geography page

In some cases you might load your geographies from an external system, perhaps PeopleSoft Enterprise CRM. You can use this page to verify the data or enter data directly if you need to.

Geography Type

Select a geography type and enter its related information. Valid values are:

City: Enter the city, then a country and state.

Country: Enter the country.

Other: Requires no further information.

Phone: Enter a country code and telephone number.

Postal Code: Enter a postal code and city, then a country and state.

Sales Region: Enter a region ID.

State: Enter a country and state.

See Also

Chapter 14, “Understanding Plans and Plan Templates,” page 307

Managing Industries

To manage industries, use the Industries (EI_BO_INDUSTRY) component. Use the EI_BO_INDUSTRY_CI component interface to load data into the tables for this component.

This section provides an overview of the Industry reference object and discusses how to manage industry information.

Understanding the Industry Reference Object

Each industry mapped from a source system can include the Standard Industry Classification (SIC) code if you use that code in your source system. This code identifies the industry type—healthcare, insurance, and so on. Each customer defined in your system is categorized according to the type of industry to which it belongs. The Industry (INDS) object is a derived class object of the EIM reference object base class (ROBJ).

Page Used to Manage Industry Information

Page Name	Object Name	Navigation	Usage
Maintain Industry	EI_BO_INDUSTRY	Compensation, Sales Incentives, Define Sales Org Structure, Industries	Add or update an industry.

Managing Industry Information

Access the Maintain Industry page.

Maintain Industry

SetID SHARE Industry ID COMPUTERS

Details

Find | View All First 1 of 1 Last

*Effective Date01/01/1900

StatusActive

Source IDCOMPUTERS, RETAIL

*Long DescriptionComputers, Retail Sales

SIC Code3571

Maintain Industry page

In some cases you might load your industries from an external system, perhaps PeopleSoft Enterprise CRM for example. You can use this page to verify the loaded data or enter data directly into your system if you need to.

Enter the SIC Code (standard industry classification code) for this industry. The Source ID field is a read-only field derived from industry staging data.

Managing Channels

To manage channels, use the Channels (EI_BO_CHANNEL) component. Use the EI_BO_CHANNEL_CI component interface to load data into the tables for this component.

This section provides an overview of the Channel reference object and discusses how to manage channel information.

Understanding the Channel Reference Object

Channels identify the method of distribution in your organization (OEM, direct, distribution, dealers, and so on). You can associate the customers defined in your system with a channel if you need to capture this relationship. The Channel (CHNL) object is a derived class object of the EIM reference object base class (ROBJ).

Page Used to Manage Channel Information

Page Name	Object Name	Navigation	Usage
Maintain Channel	EI_BO_CHANNEL	Compensation, Sales Incentives, Define Sales Org Structure, Channels	Add or update a channel. You might load your channels from an external system, PeopleSoft Enterprise CRM for example. You can use this page to verify the loaded data or enter data directly into your system if you need to.

Creating Numeric Ranges

To manage numeric ranges, use the Create Numeric Ranges (EI_BO_NUMRANGE) component. Use the EI_BO_NUMRANGE_CI component interface to load data into the tables for this component.

This section provides an overview of the Numeric Range reference object and discusses how to create numeric ranges.

Understanding the Numeric Range Reference Object

Numeric ranges make entering information more efficient by enabling you to define an acceptable range of values for attributes of reference objects that are associated with nodes. For example, you can define a numeric range to specify a zip code or postal code to indicate a specific geographic region. The NumericRange (NUMR) object is a derived class object of the EIM reference object base class (ROBJ).

If you have defined the relevant ETL maps and staging tables, you can import numeric range information from your source system. You can also define them within Sales Incentive Management.

Page Used to Create Numeric Ranges

Page Name	Object Name	Navigation	Usage
Maintain Numeric Range	EI_BO_NUMRANGE	Compensation, Sales Incentives, Define Sales Org Structure, Create Numeric Ranges, Create Numeric Ranges	Define start and end values for numeric ranges.

Maintaining Numeric Ranges

Access the Maintain Numeric Range page.

Maintain Numeric Range

SetID SHARE Numeric Range ID 19018-28806

Details

Find | View All First 1 of 1 Last

*Effective Date01/01/2000

StatusActive

*Description19018-28806 (Zip Codes)

Start Value19018.0000

End Value28806.0000

BoundaryGreater Than or Equal to

BoundaryLess than or Equal to

Maintain Numeric Range page

Note. The example shown here uses a United States zip code for the numeric range, but you can use numeric ranges for other types of numeric ranges also.

Managing Accounts

To manage accounts, use the Accounts (EI_BO_BANKACCOUNT) component. Use the EI_BO_BANKACCOUNT_CI component interface to load data into the tables for this component.

This section discusses how to manage accounts.

See Also

PeopleSoft Enterprise Sales Incentive Management for Banking and Capital Markets 8.9 PeopleBook, “Understanding Reference Data,” Accounts

Understanding the Account Reference Object

The Account object is BCM template-specific object. This is an important object, as accounts are associated with incentive plans in BCM, and can be associated with a compensation structure node.

You can associate account objects with compensation plans to assist transaction processing. For example, some incentives such as new customer acquisition might pay based on the account revenue earned for a particular period. If an account is less than 12 months old, then the revenue value of the account might be added into the monthly total revenue value. In this case, you would use the account object in the compensation plan. Similarly, some investments such as loan origination commission and investment fee commission can be handles through loan account and investment account objects by associating these objects with the respective plans.

The Account (BACT) object is a derived class object of the EIM reference object base class (ROBJ).

Page Used to Manage Accounts

Page Name	Object Name	Navigation	Usage
Accounts	EI_BO_BANKACCOUNT	Compensation, Sales Incentives, Define Sales Org Structure, Accounts, Accounts	Add or update account information.

Managing Account Information

Access the page.

Accounts

SetID SHARE Account ID A1001

Account Details Find | View All First 1 of 1 Last

*Effective Date 01/01/2001

Status Active

*Description Checking Account

Source ID A1001

Account Number 5255671351

Product RB1002 Consumer Checking

Date Opened 01/01/2001

Opening Balance 1000.000

Customer C1001 John,Kenny

* Required Field

Accounts page

Account Number	Enter the account number.
Product	Select the banking product that the account is associated with.
Date Opened	Enter the date that the customer opened the account. The system uses this date to calculate payout window eligibility.
Opening Balance	Enter the opening balance of the account.
Customer	Enter the ID of the customer associated with the account.

Managing Account Groups

To manage account groups, use the Account Group (EI_BO_BANKACTGRP) component. Use the EI_BO_BANKACTGRP_CI component interface to load data into the tables for this component.

This section discusses how to manage account group information.

See Also

PeopleSoft Enterprise Sales Incentive Management for Banking and Capital Markets 8.9 PeopleBook, “Understanding Reference Data,” Account Groups

Page Used to Manage Account Groups

Page Name	Object Name	Navigation	Usage
Account Groups	EI_BO_ACGROUP	Compensation, Sales Incentives, Define Sales Org Structure, Account Groups, Accounts Groups	Add or update account household and portfolio account groups. The AccountGroup (BAGO) object is a derived class object of the EIM reference object base class (ROBJ).

Maintaining Account Group Information

Access the Account Groups page.

Account Groups

SetID SHAREAccount Group ID RETAIL_ACT_PORTFOLIO

Account Group DetailsFindView AllFirst1 of 1Last

*Effective Date01/01/2001

StatusActive

*DescriptionPortfolio

Account GroupTypePortfolio

Group IDRETAIL_ACT_PORRetail Account Portfolio

Account Groups page

Account Group Type

Select the group type:

Household: Select to indicate that this account group is a collection of various account types grouped together into a household, regardless of customer ID.

Portfolio: Select to indicate that this account group represents a collection of accounts grouped together and to be assigned to a participant to manage those accounts as a group.

Group ID

Indicate the group ID of the household or portfolio group.

Managing Packages

To manage packages, use the Package (EI_BO_PACKAGE) component. Use the EI_BO_PACKAGE_CI component interface to load data into the tables for this component.

This section provides an overview of the Package reference object and discusses how to manage package information.

Understanding the Package Reference Object

Certain products are bundled together into packages for certain incentives in the BCM industry. Commissions are paid based on the sale of a package. In some examples, the participant must sell a certain number of products from the package to be eligible for commission (such as 3 out of 5 products). In other instances, incentives are paid only if certain products are sold as part of the package (for example, the checking account must be part of the package).






The Package (BPKG) object is a derived class object of the EIM reference object base class (ROBJ).

Page Used to Manage Packages

Page Name	Object Name	Navigation	Usage
Packages	EI_BO_PACKAGE	Compensation, Sales Incentives, Define Sales Org Structure, Packages, Packages	Add or update package details.

Managing Package Information

Access the Packages page.

Packages	
SetID SHARE	Package ID SPK101
Group ID STARTER PRODUCT PKG	
Package Details	
*Effective Date 11/05/2004 	
Status Active 	
*Description Starter Product Package	
Products Details	
Customize Find View All 	
First  1-3 of 3  Last	
<u>Group Member EIM Key</u>	<u>Required Flag</u>
1 RB1001	<input type="checkbox"/>
2 RB1002	<input type="checkbox"/>
3 RB1003	<input type="checkbox"/>

Packages page

Group Member EIM Key	The system displays the products within the group ID that are part of the package.
-----------------------------	--

Required Flag

Select to make it mandatory that a participant sell the corresponding product in the package to have that product be included for incentive calculation.

Managing Work Hours

To manage work hours, use the Work Hours (EI_BC_WORKHOURS) component. Use the EI_BC_WORKHOURS_CI component interface to load data into the tables for this component.

This section provides an overview of the Workhours reference object and discusses how to manage work hours information.

Understanding the Workhours Reference Object

In banking and capital markets, proration, based on the hours worked by a participant in a given period, is used to calculate commissions. This object stores the total number of hours a participant works.

BCM template plans have proration rules that use the work hours to calculate the proration details of commissions. Participants are paid based on the hours worked by a participant in a given period. Use the NbrHrsWorked formula in plan rules to determine these hours for a participant. You must import work hours data before executing any plans that use this formula. The NbrHrsWorked formula retrieves from the Workhours (WKHR) object the work hours data that is between the plan's processing period start and end date. The Workhours object is a derived class object without a parent class and is specific to the BCM market template. This object stores the actual hours that a participant has worked.

See Also


PeopleSoft Enterprise Sales Incentive Management for Banking and Capital Markets 8.9 PeopleBook, "Understanding Formulas"

Page Used to Manage Work Hours

Page Name	Object Name	Navigation	Usage
Work Hours	EI_BC_WORKHOURS	Compensation, Sales Incentives, Define Sales Org Structure, Work Hours, Work Hours	Add and update work hours information.

Managing Work Hours Information

Access the Work Hours page.

Work Hours	
SetID SHARE	Participant ID BRK02 Short Name Tola,Jhon
Work Hours Details	
Start Date 02/01/2001	*End Date 02/28/2001 
Scheduled Hours 160	*Work Hours 144

Work Hours page

Start Date for Gen Standing PO	The system displays the starting date of the work hours data for the participant. For example, if the imported data belongs to dates between January 31, 2001 and January 7, 2001, then the start date will be January 1, 2001.
End Date	Enter the ending date for the work hours data. For example, if the imported data belongs to dates between January 31, 2001 and January 7, 2001, then the end date will be January 31, 2001.
Scheduled Hours	Enter the total number of hours that the participant is scheduled to work for the given processing period.
Work Hours	Enter the actual number of hours that the participant worked for the given processing period.

Managing Broker Licenses

To manage broker licenses, use the Broker Licenses (EI_BC_BRLICENSE) component. Use the EI_BC_BRLICENSE_CI component interface to load data into the tables for this component.

This section provides an overview of the Broker License reference object and discusses how to manage broker license information.

Understanding the Broker License Reference Object

In order to receive incentive compensation, brokers must be properly licensed at the time of sale. The Broker License object is used in plan rules to validate the license status. There are two formulas that you can use in plan rules to validate license status: the ChkBrokerLic formula and the ReProcessBrokerLic formula. The ChkBrokerLic formula checks the license validity and promotes it to a higher processing level. This formula can be called before crediting process. The ReProcessBrokerLic formula checks the validity for the promoted transactions and if valid moves them to next processing levels.

The BrokerLicense (BLIC) object is a derived class object without a parent class and is specific to the BCM market template.

See Also

PeopleSoft Enterprise Sales Incentive Management for Banking and Capital Markets 8.9 PeopleBook, “Understanding Formulas”

Page Used to Manage Broker Licenses

Page Name	Object Name	Navigation	Usage
Broker License	EI_BC_BRLICENSE	Compensation, Sales Incentives, Define Sales Org Structure, Broker Licenses, Broker License	Add and update broker-licensing information.

Managing Broker License Information

Access the Broker License page.

Broker License

SetID SHARE **Broker ID** BRK02 **Short Name** Tola,Jhon

Broker License Details Find | View All First 1 of 1 Last

*Effective Date 01/01/2001 + -

*License Number LN54763

Country USA State CA

License Type Commercial Mortgage License Class BAS

*License Start Date 01/01/2001 *Expiry Date 01/31/2001

Lines of Authority DOI

Status Details

License Status Current

Change Date Change Reason

Continuing ED Needed

Continuing ED Needed 1 Month(s) ☒ Continuing ED completed

Broker License page

When adding a broker license, specify the setID, broker ID, short name of the broker license, country, state, and license type. The Broker ID field indicates the broker or agent who owns the license. Broker ID is equivalent to participant ID. Brokers and agents are also participants and are stored in the participant table. The State field indicates the state in which the license was issued. It is important to specify this value because a broker can have a license from more than one state at any point in time. The License Type field defines the type of broker license, such as a mortgage broker or investment broker licenses.

Broker License Details

License Number	Enter the license number of the broker.
License Class	Enter the class of the specified broker license.
License Start Date	Enter the start date of the broker license. The start date is the effective date. From this date the broker can use the license for the for the specified license type.

Expiry Date	Enter the date that this broker license expires. The system uses these dates to check the validity of the broker license.
Lines of Authority	Enter the line of authority, or particular line of business, for which the broker can use the specified license. Determine this authority based on the license specified license type.
Status Details	
License Status	Select whether the broker license is current, suspended, or closed.
Change Date	Enter the date of the license status change. For example, if the license is closed or suspended, enter the date it was closed or suspended. This date is different than the expiry date.
Change Reason	Enter the reason for the change in license status.
Continuing ED Needed	
Continuing ED Needed (continuing education needed)	Enter the number of days, months, or years the broker has to complete continuing education or certification for the license.
Continuing ED Completed (continuing education completed)	Select to indicate that the broker has completed the continuing education or certification that is required for the license.

Creating Participant Groups

To create participant groups, use the Create Participant Groups (EI_PCPN_GRP) component. Use the EI_PCPN_GRP_CI component interface to load data into the tables for this component.

This section discusses how to create participant groups.

Page Used to Create Participant Groups

Page Name	Object Name	Navigation	Usage
Sales Person Group	EI_PCPN_GRP	Compensation, Sales Incentives, Define Sales Org Structure, Create Participant Groups	Combine participants into groups. Participant groups make it easier to manage participants. For example, a participant group could contain all sales participants in the same job. You could create the participant group and then add it to the appropriate territory node, rather than adding each participant individually. The ParticipantGroup (PGRP) object is a derived class object without a parent class.

Creating Participant Groups

Access the Sales Person Group page.

Sales Person Group

SetID SHARE Group ID ACCOUNT_REPS

To create groups, use the Query Builder. Use the first grid to select individual members. Use the second grid to select a member which is a group.

Group Details Find | View All First 1 of 1 Last

*Effective Date 31 + -

*Status ▼

*Name [View Group Hierarchy](#)

Comments

Add individual members Find | First 1-4 of 4 Last

	Member ID		Short Name		
1	<input type="text" value="KU0056"/>		Ng,Edward	View Details	+ -
2	<input type="text" value="KU0145"/>		Jones,David Allen	View Details	+ -
3	<input type="text" value="KUI030"/>		Houseman,Jerry	View Details	+ -
4	<input type="text" value="KUTR04"/>		Jeffries,Anne	View Details	+ -

Add members which are groups Find | First 1 of 1 Last

	Group ID		Description		
1	<input type="text"/>			View Details	+ -

Sales Person Group page

Group Details

(Optional) Click the View Group Hierarchy link to view the compensation structure hierarchy for the given group and details for a selected group member.

Add individual members

In this group box, select the member ID of the participants that you want to add. Member (participant) IDs are maintained using the Sales Participant page under the Define Sales Org Structure menu. Query Builder is invoked when you click the Multiple Selections button.

(Optional) Click the View Details link to edit data for a selected participant.

Add members which are groups

In this group box, select the group ID of the participant groups that you want to add. Group (participant) IDs are maintained using this page.

(Optional) Click the View Details link to edit data for a selected group.

See Also

[Chapter 19, “Using Query Builder,” page 425](#)

Creating Reference Groups

To create reference groups, use the Create Reference Groups (EI_BO_GRPS) component. Use the EI_BO_GRPS_CI component interface to load data into the tables for this component.

This section discusses how to create reference groups.

Page Used to Create Reference Groups

Page Name	Object Name	Navigation	Usage
Reference Groups	EI_BO_GRP	Compensation, Sales Incentives, Define Sales Org Structure, Create Reference Groups	Combine reference objects of one type into reference groups. Reference groups make it easier to assign reference groups. For example, you could create a reference group for all products categorized as hardware. You can then assign that reference group to all sales participants responsible for selling hardware. This eliminates the need to add each hardware product to each sales participant. The RefObjectGroups (RGRP) object is a derived class object without a parent class.

Creating Reference Groups

Access the <Reference Object> Groups page.

Customer Group

SetID SHARE **Group ID** NATIONAL_ACCTS_US

To create groups, use the Query Builder. Use the first grid to select individual members. Use the second grid to select a member which is a group.

Group Details
Find | View All
First 1 of 1 Last

***Effective Date** 04/01/2000

***Status** Active

***Name** National Accounts - US

Comments

[View Group Hierarchy](#)

Add individual members
Customize | Find
First 1-6 of 6 Last

	*Member ID	Description		
1	1003	Central Association	View Details	+ -
2	1007	Surplus Co.	View Details	+ -
3	USA06	Greyson Construction	View Details	+ -
4	USA07	Riley Sunglass Company	View Details	+ -
5	USA12	Chase Football Equipment	View Details	+ -
6	USA15	Morgan International	View Details	+ -

Add members which are groups
Customize | Find
First 1 of 1 Last

	*Group ID	Name		
1			View Details	+ -

<Reference Object> Group page (customer example)

Note. The name of this page is derived from the system metadata and reflects the object type selected on the Look Up Object Type search dialog box.

Group Details

(Optional) Click the View Group Hierarchy link to view the compensation structure hierarchy for the given group and details for a selected group member.

Add individual members

In this group box, select the member ID of the reference objects that you want to add. Member (reference object) IDs are maintained using the various system object maintenance pages under the Define Sales Org Structure menu. Query Builder is invoked when you click the Multiple Selections button.

(Optional) Click the View Details link to edit data for a selected reference object.

Add members which are groups

In this group box, select the group ID of the reference groups that you want to add. Group (reference object) IDs are maintained using this page.

(Optional) Click the View Details link to edit data for a selected reference object.

See Also

Chapter 19, “Using Query Builder,” page 425

Reviewing Participant Groups or Reference Groups

This section discusses how to view participant groups or reference groups. Use the Group Hierarchy page to view a hierarchical representation of your participant groups or reference groups, depending on whether you access this page from the Participant Groups page or the Reference Objects page.

Pages Used to View Participant Groups or Reference Groups

Page Name	Object Name	Navigation	Usage
Group Hierarchy	EI_GROUP_TREE_PG	<ul style="list-style-type: none">• Compensation, Sales Incentives, Define Sales Org Structure, Create Participant Groups. Click the View Group Hierarchy link on the Participant Groups page.• Compensation, Sales Incentives, Define Sales Org Structure, Create Reference Groups. Click the View Group Hierarchy link on the Reference Groups page.	View your participant group or reference group hierarchy.

CHAPTER 11

Managing Formulas

This chapter provides an overview of formulas and discusses how to:

- Register formulas.
- Configure formulas.
- Create lookup tables.
- Create commission rate tables.
- Review delivered formulas.

Understanding Formulas

Formulas are a function or class that enable you to perform specific tasks—such as calculations, lookups, and data manipulation—that are necessary for creating computation rules. Formulas thereby assist you in writing computation rules for your organization’s incentive plans. Computation rules are the programmatic representation of your organization’s incentive compensation plan.

PeopleSoft Enterprise Incentive Management provides the functionality for creating, maintaining, and accessing formulas, enabling you to specify syntax for defining a service as well as the object model and metadata associated with a service. PeopleSoft delivers a library of predefined formulas as part of the EIM foundation, product categories, and market templates. You can reference and reuse these predefined formulas in multiple plan definitions. The library of delivered formulas should cover most organization’s business needs. You can also create your own formulas, which can be logical, mathematical, or transactional functions. Formulas are conveniently marked with identifiers so you can distinguish your organization’s custom formulas from PeopleSoft delivered formulas.

Like base and derived class metadata, you must register formulas prior to using them in plan definitions. As the delivered formulas are already registered, you need only register the custom formulas that you create. Use the Formula Catalog component to register custom formulas.

If you need to create a new formula, whether it be a customized version of a delivered formula or entirely new, you must register the new formula through the Formula Catalog component, and create the new formula using one of these methods:

- Application Classes, using the Application Class Editor in Application Designer and PeopleCode syntax.
- Java Classes, using a third-party Java Development Kit (JDK).

After you register and create the formula, you can then use it in plan definitions.

Note. If you want to modify a delivered formula, it is recommended that you create a copy of the delivered formula to modify so that the original formula is preserved.

PeopleSoft Enterprise Incentive Management also has several built-in formulas that you can use while building your plan definitions. The chapter “Understanding Rule Syntax” provides details about these built-in formulas.

See [Chapter 12, “Understanding Rule Syntax,” Common Rule Syntax, page 273](#).

Registering Formulas

To register formulas, use the Formula Catalog component (EI_FORMULA_CATALOG).

If you’ve created customized formulas, you use the Formula Catalog and related pages to register these custom formulas.

This section discusses how to:

- Register formulas.
- Define formula parameters details.
- Edit formula online help.

Pages Used to Register Formulas

Page Name	Object Name	Navigation	Usage
Formula Catalog	EI_SY_FORM_PG	Compensation, Sales Incentives, Define Sales Incentive Options, Formula Catalog, Formula Catalog	Define formula details and other information such as parameters, extended attributes, and HTML help for formulas. Also, register custom formulas so that you can use them in plan definitions.
Formula Parameters Page	EI_SY_FORMPARAM_SPG	Click the Parameter Attributes button on the Formula Catalog page.	Define detail information for a specific formula parameter.
HTML Help	EI_SY_FORM_SPG	Click the Edit HTML Help button on the Formula Catalog page.	Enter or edit any text and HTML tags to create online help for a specific formula.

Registering Formulas

Access the Formula Catalog page.

Formula Catalog

Formula ID LKUP

▼ **General Information**

***Description** Get value from lookup table ***Active Flag** Active ☒ **System Data**

***Formula Name** Lookup ***Foundation** EIM

***Version** 1 **Product Category** **Market Template**

☒ **Use in Rules?**

▼ **Formula Details**

Formula Format Java Class **Java Class Name** com.peoplesoft.im.eim.service.LookupFormula

Category Lookup **Returns** VNBR

Formula Edit Components

Formula Builder EI_LOOKUP_BUILDER	Formula Data Setup EI_LOOKUP_TABLE
Menu Name EI_COMP_ADMIN	Menu Name EI_COMP_ADMIN
Menu Bar Name FORMULA_BUILDERS	Menu Bar Name PLAN
Item Name LOOKUP_BLD	Item Name EI_LOOKUP_TABLE
Page Name EI_LOOKUP_BUILDE	Page Name EI_LOOKUP_DEFN

Formula Catalog page (1 of 3)

▼ **Parameters**

Active Flag	Type	*Parameter ID	Description			
<input checked="" type="checkbox"/>	Variable String	GridId	Lookup Table		+	-
<input checked="" type="checkbox"/>	Any type	RowVal	Dimension 1 Input		+	-
<input checked="" type="checkbox"/>	Any type	ColVal	Dimension 2 Input		+	-

▼ **Extended Attributes**

Type	Name	*Value		
			+	-

Formula Catalog page (2 of 3)

HTML Help

Lookup:

Finds a value from a lookup table. This formula is similar to the Commission formula in which it goes against a table to find a value based on several input parameters. The Lookup formula finds exact matches in a table for both string and numeric types. For range values it identifies range in the table based on the input to determine the return value. Lookup formula returns the lookup value directly from the table where as Commission formula uses its own calculation methods to retrieve the value.

Lookup tables are like spreadsheet grids. Lookup tables are capable of having cells based on either a single set of values or two sets of values. You can think of the sets of values as rows and columns, and of the lookup tables being one-dimensional or two-dimensional. A one-dimensional table might return values based on products. A two-dimensional table might return values based on the intersection of products and customers.

Parameters:

- Lookup Table Name
- Dimension 1 Input
- Dimension 2 Input (Optional)

Return Value:

- Number

Examples:

Lookup("ANN_BONUS_REP",ATTAIN_LEVEL,YRS_OF_SVC) returns a value from the ANN_BONUS_REP lookup table, using ATTAIN_LEVEL and YRS_OF_SVC as inputs.

[Edit HTML Help](#)

* Required Field

Last Update User ID DVP1 **Last Update Date/Time** 06/24/2003 10:27:02PM

Formula Catalog page (3 of 3)

General Information

Description	Briefly describe the purpose of the formula. Descriptions for formulas appear in search results when accessing this component and make the formula easier to identify.
Formula Name	Enter the name for the formula. This is the value that compensation administrators enter to call a formula within an incentive plan rule of a plan.
Version	Enter the version number of the object. By default, the system sets this number to 1. PeopleSoft Sales Incentive Management objects are labeled with a version number, and specific versions can be retrieved and loaded into the database.
Use in Rules?	Select to make the formula as usable in plan rules.
Active Flag	Select to make this formula usable in incentive plan rules and processing. By default the system selects this check box.
Foundation	The system automatically sets this field value to EIM to indicate that this formula is part of the PeopleSoft Enterprise Incentive Management foundation. You can use formulas that are defined at this level within any product category and market template. To narrow the use of a formula, specify the product category or market template to which the formula belongs.
Product Category	Select a product category for the formula to limit use of the formula to that specific product category. Currently the <i>Sales Incentive Management</i> product category is the only available option.
Market Template	If you select a product category, you can then select a market template within that product category to limit use of the formula to that specific market template. Current market templates are <i>Banking & Capital Markets</i> and

High-Tech & Industrial, both of which are part of PeopleSoft Sales Incentive Management.

System Data

The system automatically selects this check box if the formula is delivered by PeopleSoft.

Formula Details

Formula Format

Select *Java Class* or *Application Class*, and enter the Java Class or PeopleCode Class Name.

Category

Specify the category value in which this formula operates.

Returns

Indicate the type of data returned by the formula.

Java Class Name or PeopleCode Class Name

Enter the name of the object or file containing the formula code. This tells the system where to find the code when it executes the formula.

Formula Edit Components

Formula Builder

This section identifies the component that is invoked from within the Plan Definition page when you click the Function Builder button while using a formula within a rule.

Menu Name

Enter the PeopleSoft Menu Name where the formula component is located.

Menu Bar Name

Enter the PeopleSoft Menu Bar Name where the formula component is located.

Item Name

Enter the PeopleSoftItem Name for the formula component.

Page Name

Enter the PeopleSoftPage Name for the formula component.

Formula Data Setup

Also enter Menu Name, Menu Bar Name, Item Name, Page Name

Similar to Formula Builder functionality, but invoked by clicking the Formula Data Setup button in the Plan Editor. You also need to define a component menu name, menu bar name, item name, and page name here. This component is used to add data that is used by a formula. For example, if you are using the lookup formula and you click this button, you access a page where you can define a lookup table.

Parameters

Use the fields in this section to define the parameters of the formula. For example, the YearEndDt formula determines the last date of the fiscal year, so it includes the Fiscal Year and Calendar ID parameters.

Active Flag

By default, the Active Flag check box for parameter rows is selected (set to *Active*). You can clear the check box to deactivate the parameter's use in the function. But this does not remove the row from the Parameter grid area.

Type

Enter a data type for the specific parameter.

Parameter ID

Enter the name of a formula parameter.

Description

Enter a description of a formula parameter.

Parameter Attributes

Click to define attributes for a specific parameter.

Extended Attributes

Use the fields in this section to specify additional information about a formula that is not covered by the other fields on the Formula Catalog page. Essentially, these fields enable you to create new fields without having to change the formula catalog table.

Type Select the type of extended attribute for this particular object, and enter a Name and Value. For example, the base class for the Relationship Object *AOBJ* has the following extended attribute values to prompt the EIM Associated Derived Object View record: Type = *Record*, Name = *Prompt*, and Value = *EI_AOBJ_DER_VW*.

Available field values are:

- *Application Class*
- *Component*
- *Component Interface*
- *Factory Class*
- *Flag*
- *Java Class*
- *Menu*
- *Page*
- *Query*
- *Record*
- *Service*
- *String*
- *Sub-Page*
- *Sub-Record*
- *Work Record*

Name Enter the name of the extended attribute.

Value Enter the value that corresponds to the extended attribute that you entered in the Name field.

HTML Help

Use this section of the page to view descriptions of formulas. The HTML help for delivered formulas provides you with a detailed description of the formula and how to use it, including optional and required parameters showing syntax, return values, and practical examples.

Edit HTML Help Click this link to access the HTML Help page, where you can enter or edit HTML help descriptions for formulas.

Defining Formula Parameters Detail

Access the Formula Parameters Page page.

Formula Parameters Page

Parameter Attributes

Parameter ID RowVal *** Active Flag** Active

Description Dimension 1 Input

Type VANY

*** Alias** RowVal

Use Options

☒ **Required**

☐ **Constant Only**

☐ **Can Update Information**

Extended Attributes

	*Type	Extension Name	*Extension Value
1	Application Class		

HTML Help

Input for the first dimension of the lookup table.

* Required Field

OK Cancel

Formula Parameters Page page

Parameter Attributes

Alias

Enter the name of the parameter as it appears on help pages.

Active Flag

Select to include the parameter in the formula. If you clear this check box, the system no longer recognizes the parameter as part of the formula.

Use Options

Required

Select to indicate that this is a required parameter within a formula. This means that when you put the associated formula into a rule, you must specify a value for the parameter.

Constant Only

Select to indicate that this parameter is a constant value within a formula. This means that you must enter a value for this parameter as a character string in quotes, not as a variable name.

Can Update Information

If selected, then during the execution of the formula you can change the parameter values, such as an aggregator or object, that get passed into the formula.

Extended Attributes

The fields in this group box function the same as the fields in the corresponding group box on the Formula Catalog page.

See [Chapter 11, “Managing Formulas,” Registering Formulas, page 240](#).

HTML Help

You can enter online help text for this specific formula parameter that displays on page where the formula or variable is used (primarily the Plan Definition page).

Editing Formula Online Help

Access the HTML Edit page.

Enter or edit the text and HTML tags for a specific formula. The system stores the HTML code that you write here with its corresponding formula in the EI_SY_SVCM_TBL table in the DESCRLONG field. When users, such as compensation administrators, view formulas through the Formula Catalog page and other dynamic user interfaces, the system displays this information in the HTML Help section of that page. PeopleSoft provides HTML help for delivered formulas.

Configuring Formulas

To configure formulas, use the Formula Configuration component (EI_SERVICE).

This section discusses how to configure formulas.

Page Used to Configure Formulas

Page Name	Object Name	Navigation	Usage
Formula Configuration	EI_SERVICE	Compensation, Sales Incentives, Define Sales Incentive Options, Formula Configuration, Formula Configuration	Configure plug-in formulas for use in incentive plan rules. To do so, search for formulas that have a are registered with an edit component in the Formula Data Setup field on the Formula Catalog page. The system displays the formulas in the search results. Click the Edit button to access the component where you need to set up data for the formula. Thus, through this page you can quickly locate the formulas that require you to set up formula data and immediately access the necessary setup data component to complete the task. For example, the Lookup formula (LKUP) defines as its formula data setup component the EI_LOOKUP_TABLE. You therefore need to define lookup tables for this formula.

Configuring Formulas

Access the Formula Configuration page.

Formula Configuration

Enter any information you have and click Search. Leave fields blank for a list of all values.


Class ID

Class Name

Product Category

Market Template

Plug-in Details

Customize | Find | View All |  First 1-3 of 3 Last

	Class ID	Class Name	Product Category	Market Template	Edit
1	LKSP	LookupString	SI	BC	Edit
2	LKUP	Lookup			Edit
3	TRCA	Commission	SI		Edit

Formula Configuration page

Search

Click to return search results for formulas registered with a formula data setup component in the Formula Catalog. To narrow your search parameters, enter information in the Class ID, Class Name, Product Category, or Market Template fields. Leave these fields blank to return all results.

Edit

Click the Edit link to access the formula data setup component. You can only edit formulas that are registered with a formula data setup component and related menu name, menu bar name, item name, and page name defined in the Formula Edit Components group box on the Formula Catalog page.

Creating Lookup Tables

To create lookup tables, use the Lookup Table Definition (EI_LKUP_STRUCTURE) and Lookup Tables (EI_LOOKUP_TABLE) components.

This section provides an overview of Lookup tables and discusses how to:

- Create lookup table definitions.
- Define lookup table instances and formula invocation.

Understanding Lookup Tables

Lookup tables are like spreadsheet grids. Lookup tables are capable of having cells based on either a single set of values or two sets of values. Sets of values represent rows and columns of the grid. Lookup tables can be one-dimensional or two-dimensional. A one-dimensional table might return values based on products. A two-dimensional table might return values based on the intersection of products and customers.

Compensation administrators, IT resources, implementers, and plan writers define and use lookup tables, generally using them for incentive plan processing in conjunction with the delivered Lookup formula API.

To use lookup formulas in incentive plan processing:

1. Define the basic structure for one-dimensional or two-dimensional lookup tables on the Lookup Table Definition page.
2. Construct the actual lookup table with the Lookup Tables page and, based on the defined plan, enter the necessary data into the lookup table grid.
3. Set up the plan to call the Lookup formula and search the lookup table.

During plan processing, the system searches for an exact matching result in the referenced lookup table instance, given one or more input parameters.

Similar to the flexibility of the Calendar Frequencies functionality, you can create multiple unique lookup tables from a single structure definition, saving each table with a different name. For example, if a particular participant has unique commission rate structure, you can create a lookup definition specifically for this participant, and reference the lookup table on their plan's Plan Definition - Overrides page. Or, you can use the Effective Date feature to manage multiple definition versions of a specific table definition, by activating or deactivating versions.

Pages Used to Create Lookup Tables

Page Name	Object Name	Navigation	Usage
Lookup Table Definition	EI_LKUP_STRUCTURE	Compensation, Sales Incentives, Define Sales Incentive Options, Lookup Table Definition, Lookup Table Definition	Define attributes of a one-dimensional or two dimensional grid structure for lookup reference.
Lookup Tables	EI_LOOKUP_DEFN	Compensation, Sales Incentives, Define Plans, Lookup Tables, Lookup Tables	Create a lookup table instance from a predefined lookup table definition.




Creating Lookup Table Definitions

Access the Lookup Table Definition page.


Lookup Table Definition


Lookup Definition FS_NEW_CUST


Find | View All First 1 of 1 Last


Effective Date 01/01/2001  **Status** Active  

***Description** New Cust Incentive

Product Category Sales Incentive Managemen 


Market Template Banking & Capital Markets 

Grid Type Two Dimensional Grid 









Cell Type Number  **Rounding Digits** 2

Column Information

Column Description Salary

Column Type Numeric Range 

Column Headers Find | View All First 1-4 of 4 Last

	Column Header		
1	0.0000		
2	50000.0000		
3	60000.0000		
4	70000.0000		

Lookup Table Definition page (1 of 2)

Row Information

Row Description Quarterly Revenue

Row Type Numeric Range

Row Headers Find | View All First 1-9 of 9 Last

	Row Header		
1	0.0000	+	-
2	12500.0000	+	-
3	16000.0000	+	-
4	19000.0000	+	-
5	22000.0000	+	-
6	30000.0000	+	-
7	40000.0000	+	-
8	50000.0000	+	-
9	75000.0000	+	-

* Required Field

Lookup Table Definition page (2 of 2)

Once you have defined your lookup table structures, use the Lookup Tables page to construct the actual lookup tables.

General Information

Effective Date and Status

Effective dating used in this feature enables you to create multiple lookup structures of one name and retain a history of a particular structure. If you need to edit certain column or row information, you can insert a new effective-dated row, save the new structure row with the edits, and set the effective date of the original structure to *Inactive*.

Description

Enter a description for the lookup definition.

Product Category

Select a product category for the lookup definition to limit use of the lookup definition to that specific product category. Currently the *Sales Incentive Management* product category is the only available option.

Market Template

If you select a product category, you can then select a market template within that product category to limit use of the lookup definition to that specific market template. Current market templates are *Banking & Capital Markets* and *High-Tech & Industrial*, both of which are part of PeopleSoft Sales Incentive Management.

Grid Type

Select *One Dimensional Grid* or *Two Dimensional Grid*. The page display changes based on the grid type that you select. If you select *One Dimensional Grid*, just the Row Information section displays. If you select *Two Dimensional Grid*, sections to define both Column Information and Row Information display.

Cell Type	Select <i>Number</i> or <i>String</i> to define the type of data the table cells can contain. <i>Number</i> means the table data must be numeric, while <i>String</i> means the table data can be alphabetic or numeric characters.
Rounding Digits	Enter the number of digits to which the system rounds the numbers in the corresponding cells on the Lookup Tables page.
Column Information	
Column Description	Text entered in this field displays in the top row on the Lookup Table page grid.
Column Type	<p>Select the type of column to use for defining column headers in this lookup definition. The column headers appear in lookup tables that you define with this lookup definition. Select from the following choices:</p> <p><i>Number</i>: Select to use only numeric values to define headers.</p> <p><i>Numeric Range</i>: Select to define headers as a range of numbers.</p> <p><i>String</i>: Select to use both alphabetic or numeric characters to define headers.</p>
Column Header	<p>Enter the values that you want to appear as column headers for the lookup tables created from this lookup definition. The system renders column headers as the second topmost row of the grid on the Lookup Tables page.</p> <p>For numeric ranges, you can specify numbers with up to two decimal points of precision. the numeric values that you enter in the header field become the starting number of each consecutive range. For the last header value in the range, anything equal to or greater than that value falls within the range. When you create lookup tables based on this lookup definition, the system renders the columns headers as ranges. For example, if a bank pays loan officers commission based on net revenue versus the number of loans closed during a month and increases commission after every five loans closed, that bank would enter <i>0</i>, <i>6</i>, and <i>11</i> for the column header values. The system would render lookup table column headers based on this lookup definition as <i>0–5</i>, <i>6–10</i>, <i>11–And Greater</i>.</p>
Order By	This field only displays when <i>String</i> is specified as the Column Type value. If the Column Type value is <i>Number</i> , then the columns are automatically displayed in numeric order. Define the numeric sequence of the column display order. Columns display in ascending numeric order from left to right. You can also use this feature to change the Column Header display order, without having to retype the column header text.
Row Information	
Row Description	Text entered in this field displays in the second topmost row on the Lookup Table page grid in the leftmost column.
Row Type	<p>Select the type of row to use for defining row headers in this lookup definition. The row headers appear in lookup tables that you define with this lookup definition. Select from the following choices:</p> <p><i>Number</i>: Select to use only numeric values to define headers.</p> <p><i>Numeric Range</i>: Select to define headers as a range of numbers.</p> <p><i>String</i>: Select to use both alphabetic or numeric characters to define headers.</p>

Row Header

Enter the values that you want to appear as row headers for the lookup tables created from this lookup definition. The system renders row headers as the leftmost column of the grid on the Lookup Tables page.

For numeric ranges, you can specify numbers with up to two decimal points of precision. the numeric values that you enter in the header field become the starting number of each consecutive range. For the last header value in the range, anything equal to or greater than that value falls within the range. When you create lookup tables based on this lookup definition, the system renders the row headers as ranges. For example, if a bank pays loan officers commission based on net revenue versus the number of loans closed during a month and increases commission after 10,000.00 net revenue and 35,000.00 net revenue, that bank would enter *0.00*, *10001.00*, and *35001.00* for the column header values. The system would render lookup table column headers based on this lookup definition as *0–10000*, *10001–35000*, *35001–And Greater*.

Order By

This field only displays when *String* is specified as the row type value. If the row type value is *Number*, then the rows are automatically displayed in numeric order. Define the numeric sequence of the row display order. Rows display in ascending numeric order. You can also use this feature to change the row header display order, without having to retype the column header text.

Defining Lookup Table Instances and Formula Invocation

Access the Lookup Tables page.

Lookup Tables

SetID SHARE

Lookup Definition FS_NEW_CUST

Lookup Table FS_NEW_CUST

Find | View All

First 1 of 1 Last

*Effective Date 01/01/2001

*Description New Cust Incentive

Salary

View All

First 1-9 of 9 Last

Quarterly Revenue	0-49999.99	50000-59999.99	60000-69999.99	70000-And Greater
0-12499.99	0.00	0.00	0.00	0.00
12500-15999.99	10.00	0.00	0.00	0.00
16000-18999.99	12.00	10.00	0.00	0.00
19000-21999.99	14.00	12.00	10.00	0.00
22000-29999.99	16.00	14.00	12.00	10.00
30000-39999.99	20.00	16.00	14.00	12.00
40000-49999.99	20.00	20.00	16.00	14.00
50000-74999.99	20.00	20.00	20.00	16.00
75000-And Greater	20.00	20.00	20.00	20.00

Save

Lookup Tables page

Once you define the basic structure for one-dimensional or two-dimensional lookup tables with the Lookup Table Definition page, your compensation administrator can then construct the actual lookup table using the Lookup Tables page.

Lookup table instances are generally defined for use in incentive plan processing. Compensation administrators can reference the lookup table instance in an incentive plan definition by invoking the Lookup formula and citing the lookup table instance in a plan processing step. The Lookup formula processes the number type, string, or number range values from the lookup table and retrieves the appropriate value from the table. The Lookup Formulas API has four different options depending on your configuration parameters. The formulas uses the as of date of the transaction to use the appropriate effective-dated lookup table.

Creating Commission Rate Tables

To create lookup tables, use the Commission Table Definition (EI_RATE_STRUCTURE) and Commission Tables (EI_RATE_TABLE) components.

This section provides an overview of commission tables and discusses how to:

- Create commission table definitions.

- Define commission rate table instances and formula invocation.

Understanding Commission Tables

Commission tables are similar to lookup tables, but contain additional features required for calculating a commission. You can use commission tables to look up commission rates based on incoming transactions and to-date values of attainment. You can use the obtained rate and use it in subsequent calculations in the plan. Commission tables are one-dimensional only. You can construct table definitions, from which the compensation administrator creates rate table instances with commission attainment values. Commission rate tables are used to calculate commission attainment values during the incentive calculation process.

You use commission rate tables and rate formulas for complicated interpolative cases. The system calculates the correct commission rate based on the rate information defined in the referenced commissions rate table instance. Unlike the lookup formula calculation (which searches for an exact match of the given input parameters), the commission rate formula performs whichever cumulative, interpolative, or complicated calculations are necessary to return the correct commission rate.

See Also

[Chapter 11, “Managing Formulas,” Creating Lookup Table Definitions, page 249](#)

Defining Commission Table Definitions

Page Name	Object Name	Navigation	Usage
Commission Table Definition	EI_RATE_STRUCTURE	Compensation, Sales Incentives, Define Sales Incentive Options, Commission Table Definition, Commission Table Definition	Define attributes of a grid structure for commission rate reference.
Commission Tables	EI_RATE_DEFN	Compensation, Sales Incentives, Define Plans, Commission Tables, Commission Tables	Create a commission rate table instance from a predefined commission table definition.

Creating Commission Table Definitions

Access the Commission Table Definition page.

Commission Table Definition

Lookup Definition HT-BONUS

Find | View All First 1 of 1 Last

Effective Date 01/01/2001 **Status** Active

***Description** HT&I Bonus Table

Product Category Sales Incentive Management

Market Template High Tech & Industrial

Cell Type Number **Rounding Digits** 6

Number Type Currency **Currency Code** USD US Dollar

Cap Rate Table ☒ Capped ☐ Not Capped

Calculation Type **Calculation between Points** Step ☐ Interpolate

Row Information

Row Description Attainment %

Row Type Number **Number Type** Percent

Row Headers First 1-4 of 4 Last

	Row Header			
1	0.0000	%	+	-
2	100.0000	%	+	-
3	110.0000	%	+	-
4	120.0000	%	+	-

Commission Table Definition page

- Product Category** Select a product category for the lookup definition to limit use of the lookup definition to that specific product category. Currently the *Sales Incentive Management* product category is the only available option.
- Market Template** If you select a product category, you can then select a market template within that product category to limit use of the lookup definition to that specific market template. Current market templates are *Banking & Capital Markets* and *High-Tech & Industrial*, both of which are part of PeopleSoft Sales Incentive Management.
- Cell Type** Displays the data type for the cells in the table that you are defining. For commission tables, the system displays *Number*. For lookup tables, select from the available translate values.
- Rounding Digits** Specify the number of digits the calculation will round up to.

Number Type	The commission table cell values can be <i>Currency</i> if the commission is a flat amount, or <i>Percent</i> if the commission is a rate to be applied against another value, such as Attainment. If your commission is an amount, you also need to specify a currency code. If your commission is a rate, then no currency code is necessary.
Currency Code	Indicate the currency code for the commission formula to use when it calculates commissions for transactions that apply to this commission table definition.
Capped	Select this option to have the highest value in the commission table be the highest result returned from the commission formula.
Not Capped	Select this option so that, when the commission parameters fall beyond the highest value in the table, the commission formula takes the last two table entries and extrapolate beyond them to determine the returned commission value.
Calculation between Points	<p>This parameter relates to a transaction that crosses multiple points in the commission table. For example, consider a commission table with three rows for attainment: 80 percent, 100 percent, and 120 percent. An salesperson has current attainment of 98 percent. A single large sale to XYZ Company takes that person from 98 percent to 118 percent attainment.</p> <p><i>Step:</i> Select this option to have the commission formula calculate the entire commission at the highest point in the commission table. Following the example above, the commission formula calculates the salesperson's entire commission at the rate for 118 percent attainment.</p> <p><i>Threshold:</i> Select this option to have the commission formula calculate commission at multiple points in the commission table based on whether the salesperson passes the threshold into the subsequent attainment level. Following the example above, the commission formula calculates the portion of the salesperson's commission prior to passing the 100 percent threshold at the rate for 80 percent attainment, then calculates the rest at the rate for 100 percent attainment.</p>
Interpolate	<p>If selected, the system calculates the mid-point of two values on the y-axis of a table instance. If not selected, only the lesser value is used during calculation.</p> <p>For example, a table definition instance is defined so that a sales person receives an 8 percent commission rate for achieving 80 percent of their attainment goal, and a 9 percent commission rate for achieving 100% of attainment goal. If the individual achieves 90 percent of the attainment goal, and interpolation is active, the system calculates the correct commission rate percentage (between 8 percent and 9 percent). If interpolation is not active, the system performs the calculation only with the 8 percent rate.</p>
Row Description	Enter text to identify the data rows of the commission tables that you define with this commission table definition. The text that you enter in this field displays in the top row on the Commission Tables page grid.
Row Type	The system displays <i>Number</i> to show the type of row used for defining row headers in this commission definition.
Number Type	Specify if the row number type is <i>Currency</i> or <i>Percent</i> , and complete the Row Header grid. When defining the row values, the value used is the left side boundary of the range. For example, say your first range is 0 to 99 percent, and your second range is 100 percent to 109 percent. You only need to specify

the left values of the range: 0 for the first range, and 100 for the second range. The system uses the value in the Rounding Digits field to determine significant digits for reaching the range boundaries.

Row Header

Enter the values that you want to appear as row headers for the lookup tables created from this lookup definition. The system renders row headers as the leftmost column of the grid on the Lookup Tables page.

Defining Commission Rate Table Instances and Formula Invocation

Access the Commission Tables page.

Commission Tables

SetID SHARE **Commission Definition** HT-BONUS

Commission Table ANNUAL_BONUS_RMGR

***Effective Date** 01/01/2001

***Description** Annual Bonus - Regional Mgr

Attainment %

Range	Value	Currency
0-99.999999%	0.000000	USD
100-109.999999%	10,000.000000	USD
110-119.999999%	15,000.000000	USD
120-And Greater%	20,000.000000	USD

Save

Commission Tables page

This functionality is similar to using lookup table instances and the Lookup formula. Your compensation administrator defines commission table instances, and references an instance with the delivered Rate formula in an incentive plan.

See Also

[Chapter 11, “Managing Formulas,” Defining Lookup Table Instances and Formula Invocation, page 253](#)

Reviewing Delivered Formulas

This sections discusses delivered PeopleSoft Enterprise Sales Incentive Management formulas.

Note. The HTML Help section of the Formula Catalog page provides additional details about each formula, such as usage, parameters, return value, and examples. This section focuses on the purpose of each formula and when and why you might want to use it.

See Also

PeopleSoft Enterprise Sales Incentive Management for High Tech and Industrial 8.9 PeopleBook, “Understanding Formulas,” Delivered Formulas for Sales Incentive Management for High-Tech and Industrial

PeopleSoft Enterprise Sales Incentive Management for Banking and Capital Markets 8.9 PeopleBook, “Understanding Formulas,” BCM Formulas

Delivered PeopleSoft Sales Incentive Management Formulas

This section discusses delivered formulas for PeopleSoft Sales Incentive Management that are defined at the EIM foundation level and Sales Incentive Management product category level:

Formula Name	Description	Business Use Examples
ActiveInPlanPeriod	Calculates the number of days a participant has been active in a particular plan in a particular period. This formula currently works with the PERS object class only.	Prorate payment amounts. Use in combination with the DaysInPeriod formula to determine a proration percentage.
ActiveInPosn	Calculates the number of days a participant has been active in a particular job. This formula currently works with the PERS object class only.	Determine eligibility for bonus payouts or to prorate payment amounts. Use in combination with the DaysInPeriod formula to determine a proration percentage.
AddToDt	Changes a date by adding days, months, or years to that date.	In conjunction with DupTxn and HoldForDt, add set amounts of time to a transaction date and then holds a duplicate of the transaction until that date. For example, a corporation might reconcile payouts against revenue recognized for that transaction after a six-month period.
And	Returns a value of True if all of the parameters are true.	Allocate a transaction when all conditions in the And statement are true.
ApplyDraw	Determines if a draw has been created for the participant in the current plan. If so, this formula uses the draw definition to determine whether to issue a draw payment or recover an existing draw balance.	Draws set a floor for incentive compensation for a given period, so when writing a plan, this function occurs after payouts have been calculated. You want to have a draw or recovery calculated only after calculating other incentives.

Formula Name	Description	Business Use Examples
Avg	Calculates the average of entries in an aggregator.	Calculate an average sale bonus. For example, if an average sale is above 4,000.00 USD for the quarter, pay a 2,000.00 USD bonus.
AvgForDates	Gets the average value for an aggregator over a date range. The system averages the individual detail entries, not the period totals.	Determine and analyze trends, such as the average number of sales in one period versus another period.
AvgForPeriod	Gets the average value for an aggregator or compound number for a given period. For aggregators the system averages the individual detail entries, not the period total. For compound numbers the formula just returns the value of the compound number for the specified frequency.	Calculate dollar amounts such as average total sales or average sales for a particular product line. Calculate metrics such as average customer satisfaction scores or product mix on sales.
AvgForPeriods	Gets the average value for an aggregator or compound number over a range of periods. For aggregators the system averages the individual detail entries, not the period totals.	For participants receiving commission on a monthly basis, award a bonus for achieving a certain average in any given quarter.
Balance	Retrieves participant ledger balance by compensation context for a pay period and payment code.	Use for formulas that need to compare payouts for different payment codes or for custom draw formulas.
CheckDupTxn	Finds other transactions for the current participant in the current compensation context and limits the total credit amount to a specified percentage of the transaction amount (BASE_AMT).	<p>Use in manager's plans to limit the rollup percentage of an order. For example, you might want managers to receive no more than 100 percent of any deal credited to them via rollup transactions from their sales team members.</p> <p>Warning! In order to limit the sum of all transactions credit amounts, the formula modifies the credit amount on one or more of the transactions. There is no way to predict which transactions the formula will change, nor is there a way to preserve the original credit amount. Therefore, you should use this formula <i>only</i> if you do not need to keep the original credit amounts intact.</p>

Formula Name	Description	Business Use Examples
Commission	Calculates commission by extending an entry in a commission table against the current transaction amount.	Calculate commission rates or payouts that are based on tiered level ranges. For example, you might want to pay a participant commissions for sales up to 500,000.00 USD at 2 percent, commissions for sales from 500,001.00 - 1,000,000.00 USD at 4 percent, and commissions for sales above 1,000,000.00 USD at 5 percent.
Comp	Updates the current transaction with a specified compensation amount.	Update a transaction's compensation amount field with a specified value, its credit currency field with the business unit's currency, and the credit date field with the job run date, for a specified date, in one rule.
CopyTxnToNode	Creates a copy of the current transaction, assigning the new transaction to someone else.	Split or share a credit when the node of the participant(s) receiving a copy of the current transaction is known.
Count	Returns the number of entries that comprise an aggregator, as of a given date.	Track the number of sales for a period for accelerator or bonus considerations. For example, you might want a participant who makes over 500 sales for the quarter receive a 1,000.00 USD bonus.
CountForDates	Gets the number of detail entries for an aggregator over a date range.	Compare the number of sales or particular items sold from one period to the next.
CountForPeriod	Gets the number of detail entries in a single period for an aggregator or compound number. For compound numbers the formula returns 1.	Calculate the number of new accounts acquired or the number of accounts/products sold to any one household. Achievement could be a threshold (level that must be achieved to receive commission pay) or the basis for a bonus (if 10 new products are sold to one household in a month, the participant is bonus eligible, for example).
CountForPeriods	Gets the number of detail entries in a range of periods for an aggregator or compound number. For compound numbers the formula returns the number of periods.	Use to pay underwriters for each loan underwritten, but make them eligible for a bonus if they achieve a specific count over the course of a quarter.
CreateTxn	Creates a payout transaction with the specified performance measure, payment code, payout amount, and transaction state.	Summarize transactions. You can also calculate bonuses when there isn't an existing transaction to run the payout formula against.

Formula Name	Description	Business Use Examples
Credit	Updates the current transaction with a specified credit amount.	Update a transaction's compensation amount field with a specified value, its credit currency field with the business unit's currency, and the credit date field with the job run date, for a specified date, in one rule.
Date	Takes the different components of a date—year, month, and day—as three separate numbers, and combines them to form a date value.	Take date components (day, month, and year) of a transaction individually, as numbers, and combines them to form a date value that can update date fields on the transaction.
Day	Returns the day component of a date.	Use to update the “Credit” or “Comp” related fields on the transaction.
DayOfWeek	Returns the day of week for a specified date.	Use whenever a day portion of a date field is needed for allocation or calculation.
DaysBtwn	Calculates the number of days between two dates.	Calculate the number of days that have passed in a period up between two transaction dates. Use that number for an accelerator type of calculation for early sales. For example, you might want each sale that a participant makes within 10 days of the start of the quarter to be credited at 125 percent instead of 100 percent.
DaysInPeriod	Calculates the number of days in a plan period, using the plan frequency.	Use in bonus calculation. For example, a participant exceeds his quota amount and receives a payout of 10.00 USD per day for the period. For the purposes of proration, you can use this formula in combination with either the ActiveInPlan or ActiveInPosition formulas to determine a proration percentage.
DumpEnv	Dumps engine runtime variables.	Used this formula for debugging purposes only. The environment object is important to the formula. If you implement your own formula in Java, the environment object is the first parameters that gets passed in to the formula.

Formula Name	Description	Business Use Examples
DupTxn	Creates a duplicate of the current transaction within the same batch and assigns the duplicate transaction to the current participant.	<p>Use to have multiple credits for the same transaction according to the business. For instance, a participant might earn a separate credit to be processed differently downstream if the order amount exceeds a certain threshold.</p> <p>Use in combination with the HoldForShip, HoldForInv, or HoldForPymnt formulas. For example, you could create a compensation plan that credits and pays a participant 50 percent of the commission earned for a transaction upon order placement, but withholds payment of the remaining 50 percent until the client pays for the order in full.</p>
FindTxnCount	Returns the total count of transactions that match input filters.	<p>Determine if there is more than one instance of a transaction before applying the FindTxnNumAttr or FindTxnStrAttr formulas.</p> <p>This formula should be used in a plan's section with a transaction feed.</p> <p>Note. FinxTxnCount is based on the snapshot of database before entering the section. The FindTxnCount, FindTxnNumAttr, and FindTxnStrAttr formulas query the database directly by opening another Select query. If the current selection is changing the transaction, those records will not be visible to the query selection.</p>
FindTxnNumAttr	Returns the number value of a given attribute name of the transaction that matches the input name/value pair filters.	<p>Process adjustments when you want to use the commission rate from the original transaction.</p> <p>This formula should be used in a plan's section with a transaction feed.</p>
FindTxnStrAttr	Returns the String value of a given attribute name of the transaction that matches the input name/value pair filters.	<p>Use whenever you need a string value from an existing transaction for a calculation.</p> <p>This formula should be used in a plan's section with a transaction feed.</p>
HoldForDt	Holds a transaction until a specific date. While a transaction is held, it does not undergo further processing.	Calculate quarterly attainment bonuses monthly for reporting purposes, while holding payment of those bonuses until the end of the quarter.

Formula Name	Description	Business Use Examples
If	Conditional execution.	Return one value when a condition is true and another when it is false. See Chapter 12, “Understanding Rule Syntax,” Formula Syntax, page 277.
Insert	Inserts a value into an aggregator variable.	Because it is more descriptive, you should use this syntax whenever you need to update an aggregator or attainment variable.
LedgerSum	Aggregates ledger balances across multiple periods for the participant in a specific compensation context, for a specific payment code.	Cap payouts for a certain payout code. For example, you might want to pay a participant a bonus of 100.00 USD for every new account, but limit the bonus to a maximum of 1,500.00 USD for the year.
Lookup	Finds a value from a lookup table.	Derive a value from two inputs. For example, the commission rate that a participant receives on a product is depends on two factors: customer and product family.
Max	Returns the maximum value of entries in an aggregator, as of a specific date.	Calculate bonuses. For example, you might want participants whose maximum sales are over 10,000.00 USD to receive a 1,000.00 USD bonus.
MaxForDates	Gets the maximum value for an aggregator over a date range. The system uses the individual detail entries, not the period totals.	Determine the maximum sale for a particular date range to reward a participant.
MaxForPeriod	Gets the maximum value for an aggregator or compound number for a given period. For aggregators the system uses the individual detail entries, not the period total. For compound numbers the formula just returns the value of the compound number for the specified frequency.	Make participants that achieve maximum sales of 500,000.00 USD in a particular period eligible for the President’s Club.
MaxForPeriods	Gets the maximum value for an aggregator or compound number over a range of periods. For aggregators the system uses the individual detail entries, not the period totals.	Make participants bonus eligible is they achieve a maximum number of accounts of 50 during a range of periods.
Min	Returns the minimum value of the entries in an aggregator, as of a specific date.	Calculate bonuses. For example, you might want participants whose minimum sales are over 7,000.00 USD to receive a 1,000.00 USD bonus.

Formula Name	Description	Business Use Examples
MinForDates	Gets the minimum value for an aggregator over a date range. The system uses the individual detail entries, not the period totals.	Determine the minimum discount offered for a given range of time.
MinForPeriod	Gets the minimum value for an aggregator or compound number for a given period. For aggregators the system uses the individual detail entries, not the period total. For compound numbers the formula just returns the value of the compound number for the specified frequency.	Take away bonus eligibility for participants who achieve a customer satisfaction rating of a 3 or less for a given period.
MinForPeriods	Gets the minimum value for an aggregator or compound number over a range of periods. For aggregators the system uses the individual detail entries, not the period totals.	Do not pay commissions to a participant who does not process the minimum qualifying number of 30 new loans for a range of periods.
Month	Returns the month component of a specified date.	Use whenever a month portion of a date field is needed in allocation or calculation rules.
MonthsBtwn	Calculates the number of whole months between two given dates and returns the value, assuming a 30 day month.	Use for an accelerator type of calculation for early sales. For example, you might want each sale that a participant makes within 4 months of the start of the year to be credited at 125 percent instead of 100 percent.
Or	Returns a value of True if at least one of the parameters are true.	Allocate a transaction when at least one of its conditions in the And statement are true.
OverlapBegDt	Returns the first date that two date ranges overlap when given two date ranges.	Use whenever the earliest common day of two date ranges is needed in allocation or calculation rules.
OverlapEndDt	Returns the last date that two date ranges overlap when given two date ranges.	Use whenever the last common day of two date ranges is needed in allocation or calculation rules.
Payout	Updates the current transaction with the specified payment amount and payment code, indicating that the transaction is ready to be posted, after which it will be published to the payment system of record.	Use after calculating a payout amount to update a current transaction with the calculated amount, the desired payment code, and optionally, a payout date. For example, after calculating a participant's commission at 1,500.00 USD, you want the system to update the transactions payout amount field with the calculated amount and the payment code field with the value Commission.

Formula Name	Description	Business Use Examples
PeriodBegDt	Calculates the start date of a period, according to a given frequency.	In conjunction with HoldForDt, hold a transaction with an incomplete stat until the start of the next period. For example, a participant's attainment is over 100 percent. You want to promote to a state where payout is processed. Otherwise you want to hold it until the next month when the comparison can be made again.
PeriodEndDt	Calculates the end date of a period, according to a given frequency.	Retrieve the current period when used in combination with PeriodForDt. You can use the results to test for period qualifications for bonuses.
PeriodForDt	Returns the period number in which a given date falls.	Find the period for a date on the transaction. You can then use the period in a lookup table to return a seasonality factor. For example, a participant receives a varying percentage kicker for selling off season items. In this case, period would be one dimension of the lookup table, and product family could be the other.
PeriodsInPlanCal	Calculates the number of plan periods in a calendar year, given a frequency for the calendar.	Use in calculations to derive a period quota amount from an annual quota variable ($\text{PeriodQuota} = \text{AnnualQuotaVar} / \text{PeriodsInPlanCal}$)
Post	Posts transactions to the SIM ledger so that they can be published to external systems of payment record.	Update the ledger table with the transaction payout amounts from the current period that are ready to be paid.
ProcessInSection	This formula goes to the specified section within the same step.	Control the processing flow and readability of a section. This formula obviates the need to have many If statements within the logic of the plan. The engine does not process target sections under normal processing. They are processed by redirecting transactions to the section.
ProjDt	Takes a date and shifts it to a different period by taking the offset from the beginning of the original and projected periods.	Project transactions for one period into a future period for modeling purposes.

Formula Name	Description	Business Use Examples
Promote	Promotes a transaction to a specified processing state. Processing state is critical to plan processing because each plan section has a designated transaction type and transaction state feed, meaning it only processes transactions in an expected state.	Plan sections use processing state as a filter and most transactional sections contain a Promote formula to ensure that transactions will qualify for processing by a subsequent section.
PublishLedger	Publishes incentive compensation to payment systems of record, such as payroll or accounts payable.	Send payment for either all unpublished payout information or unpublished information for a specific payment code to the system of record for a context.
PutMsg	Writes message to message log, it was designed to print useful message during incentive plan rules execution, such as monthly sales, transaction amount. A predefined message set and message number are required, optional binding parameters must match the message definition. Do not put multi-value variables such as Quota, Compound Number, Aggregator as binding parameters. Log level supports "Info," "Debug," "Warning," "Error," and "Fatal." The current job logging level determines messages written to log or not.	Place a message into an SIM log file. Use to place an informational message when an error trapping set of rules is triggered.
Rollup	Rolls up transactions to participants on the same node or higher, with a specified role.	Give managers credit for the activities of their subordinate employees. The manager plan may use the CheckDupTxn formula to limit the rollup percentage of an order.
RoundDown	Rounds a number down to a specified number of digits.	This formula is especially useful when sending values as input parameters in lookup or commission formulas. Note. This formula makes positive numbers smaller and negative numbers larger.
RoundUp	Rounds a number up to a specified number of digits.	Use to round up payout amounts to the nearest whole dollar.
Sum	Calculates the sum of all entries in an aggregator as of a given date.	Use whenever you require the sum of aggregator or attainment entries up to a specific date.
SumForDates	Gets the total for an aggregator over a date range. The system sums the individual detail entries, not the period totals.	Use to sum any values for a specific date range that does not match the period.

Formula Name	Description	Business Use Examples
SumForPeriod	Gets the total for an aggregator or compound number for a given period.	Make participants bonuses eligible if their sales volume reaches a specific amount within the period.
SumForPeriods	Gets the total for an aggregator or compound number over a range of periods.	Make participants bonuses eligible if their quarterly sales volume reaches a specific amount.
Today	Returns the as of date from the current process.	Use when you need the as of date from the current process schedule for comparison or formula calculation. Use in combination with PeriodforDt to return the current processing period.
UpdateVarValue	Updates the specified frequency and period of a compound number with the specified value.	Use to take a value from a table. For example, a commission may increase or decrease based on tenure. You could use the UpdateVarValue formula to store the commission rate for a participant based on tenure.
VariableValue	Gets the value of an aggregator or compound number for a given period.	Calculate the sales volume for a defined processing period.
WeeksBtwn	Calculates the number of full (7 day) weeks between two given dates.	Use for an accelerator type of calculation for early sales. For example, you might want each sale that a participant makes within 4 weeks of the start of the quarter to credit at 125 percent instead of 100 percent.
Year	Returns the year component of a specified date.	Use whenever a year portion of a date field is needed for allocation or calculation rules.
YearBegDt	Returns the start of a calendar year.	Designate the beginning of a plan year for allocations or calculations. You can use it in combination with MonthsBtwn to determine the number of months between the start of the year and a transaction date to calculate an early sales accelerator. For example, you might want each sale that a participant makes within 4 months from the start of the year to credit at 125 percent rather than 100 percent.
YearEndDt	Returns the end of a calendar year.	Use with the payout formula to hold payouts until the end of the year. Calculations for annual bonus qualification occur each month for reporting, but payouts should not occur until the end of the year.

CHAPTER 12

Understanding Rule Syntax

This chapter discusses:

- Rule types.
- Common rule syntax.
- Syntax specific to incentive plan rules.

Rule Types

Sales Incentive Management uses two types of rules during the development of configuration plans and incentive plans: transaction allocation rules and incentive plan rules. In general, the syntax for writing rules is similar to the syntax used in spreadsheet applications. However, where spreadsheet applications generally run rules simultaneously, the rules that you write in Sales Incentive Management run sequentially based on the order in which they appear in the incentive plan or configuration plan. The syntax for transaction allocation rules and incentive plan rules is the same except for a few minor variations. These two types of rules differ mainly in their goals.

Transaction allocation rules associate transactions with objects to determine which plans on a compensation structure must process transactions and which participants on the plan get transactions assigned to them. Transaction allocation processing takes each transaction that needs to be processed and evaluates it against the transaction allocation rule expressions in configuration plans and incentive plans. Transaction allocation rules are always applicable to both configuration plans and incentive plans. A transaction allocation rule returns either a value of either True or False. The system allocates the transaction only if the return value of the transaction allocation rule is True. This logic is embedded in transaction allocation processing.

The following are basic examples of transaction allocation rules:

```
RawOrderTransaction.PCPN_EIM_KEY = Person.EIM_KEY
```

```
RawOrderTransaction.PROD_EIM_KEY ISIN Product["PRODUCTS"].EIM_KEY
```

Incentive plan rules determine the actual processing of transactions by defining calculations, terms, and conditions for transaction processing. You define incentive plan rules in the sections of an incentive plan.

To build incentive plan rules, you use the following general form:

Label = Expression

The label, which is the left side of the rule, specifies which object or variable holds the result of the expression. If you process an incentive plan rule where the object or variable already holds the results of an expression, the system updates the object or variable with the new results. A rule label is valid only if you can pass the results of an expression into it, thereby updating it. Labels are specific to incentive plan rules and are easily recognizable on the application page.

The following table lists label identifiers:

Label Identifier	Description	Examples
Plan variable	A variable that is defined in the variables section of a plan. Plan variables include aggregators, attainments, accesses, constants, quotas, compound numbers, boolean values, strings, dates, and reference variables.	<p>Example 1:</p> <p><i>AttainmentQTD</i> = Transaction.AMOUNT</p> <p>Example 2 (aggregator/attainment):</p> <ol style="list-style-type: none"> 1. Define an aggregator plan variable named <i>PROD_REV_ATTAIN</i>. 2. Define an accessor <i>PROD_REV_ATTAIN_ACC</i> that accesses the <i>PROD_REV_ATTAIN</i> aggregator variable. <p>Include in the access definition the access names and details. In this example, access names include <i>PROD_REV_ATTAIN_QTR</i> and <i>PROD_REV_ATTAIN_ANN</i>.</p> <ol style="list-style-type: none"> 3. Write a rule that uses one of the access names in the access definition to access the aggregator. <p>For example, <i>PROD_REV_ATTAIN_ANN</i> = Order.CREDIT_AMT</p>
Local variable	<p>A variable definition that is local to the current running section of the plan. Local variables are a temporary place to put a value that is necessary for current processing and then discarded. Local variables are similar to subtotals on spreadsheets—they make calculations easier.</p> <p>There are two rules to remember regarding local variables:</p> <ul style="list-style-type: none"> • The first time that you use a local variable in a plan section, you must first declare its value so that you can later use it in a rule. • When you declare a local variable, it remains that value throughout the remainder or the plan section. 	<p>Example 1:</p> <p><i>A</i> = 5</p> <p><i>B</i> = <i>A</i> x .1</p> <p>Example 2:</p> <p><i>ATTAIN_PCT</i> = <i>NEW_ATTAIN</i> / <i>REV_QUOTA_ANNUAL</i></p> <p>Order.ATTAIN_AMT = <i>NEW_ATTAIN</i></p>

Label Identifier	Description	Examples
Transaction field	<p>A field that assigns the result of the expression to the specified attribute on the current transaction that the system processes.</p> <p>Note. To use a transaction attribute in a rule, you must select the Use In Rules check box for the transaction type and the Active check box for the attribute on the Base Catalog and Object Catalog pages.</p>	<p>Example:</p> <p>Order.PERF_MEASURE = "TOTAL_REVENUE"</p>
Blank	<p>A rule that has a formula expression but no label. If there is no label, the system evaluates the expression but does not return the result to the label side of the rule and therefore does not store the result anywhere. This is common if the rule is being run for its side effects, and the return value is not used. However, every formula returns some value.</p>	<p>Example 1:</p> <p>Promote(300)</p> <p>Example 2:</p> <p>Rollup("MANAGER1", "LAYER", "REGION", "UPTO", 300, "PROD REV")</p>

The *expression* is any valid combination of calculations. Expressions appear in both incentive plan rules and transaction allocation rules. For incentive plan rules, an expression is the right side of the rule. For transaction allocation rules, the entire rule is the expression.

An expression can be one of the following types:

Expression Type	Description	Examples
Straightforward value	<p>A straightforward value can be a number, string, boolean, transaction attribute, participant object attribute, reference object attribute, or variable. In incentive plan rules, a variable is valid in a rule expression only if the resulting expression returns a single value that you can then use.</p>	<p>Number example:</p> <p>$A = 5$</p> <p>String example:</p> <p>$A = \text{"Completely Satisfied"}$</p> <p>Boolean example:</p> <p>$A = \text{TRUE}$</p> <p>Transaction attribute example:</p> <p>$A = \text{Order.SALES_AMOUNT}$</p> <p>Variable example:</p> <p>$\text{PROD_REV_ATTAIN} = \text{PROD_REV_ATTAIN_QTR} + \text{Order.SALES_AMOUNT}$</p>

Expression Type	Description	Examples
Mathematical calculations	Basic math.	<p>Addition example:</p> $NEW_ATTAIN = PROD_REV_ATTAIN_QTD$ <p>where <code>PROD_REV_ATTAIN_QTD</code> is an access method for the <code>PROD_REV_ATTAIN</code> aggregator variable.</p> <p>Subtraction example:</p> $INCREASE_REV = PROD_REV_YTD - VariableValue(PROD_REV_ATTAIN, "Monthly", 0)$ <p>Multiplication example:</p> $QTRLY_BONUS = (PROD_REV + SERVICE_REV) \times .05$ <p>Division example:</p> $ATTAIN_PCT = NEW_ATTAIN / PROD_REV_QUOTA_Y$
Formulas	<p>A function or class that enables you to perform specific tasks, such as calculations, lookups, and data manipulation. You can call upon formulas in incentive plan rules either by using them directly or by embedding the formula within another formula. You can also use variables as parameters within formulas. Sales Incentive Management delivers a catalog of formulas.</p> <p>Note. You can embed formulas many layers deep. However, it is best to keep embedded formulas simple, to ease maintenance.</p>	<p>Delivered Formula Example 1:</p> $PromoCutoffDate = Date(2003, 12, 31)$ <p>In this example, the formulas parameters are year, month, and day. <code>PromoCutoffDate</code> is a local variable updated through the <code>Date</code> formula.</p> <p>Delivered Formula Example 2:</p> $CREDIT_AMT = IF (Order.ORDER_DATE < PromoCutoffDate, Order.SALES_AMOUNT \times 1.05, Order.SALES_AMOUNT)$ <p>In this example, the formula parameters are <code>logical_test</code>, <code>value_if_true</code>, and <code>value_if_false</code>. This formula uses the local variable <code>PromoCutoffDate</code> as part of the <code>logical_test</code>.</p> <p>Embedded Formula Example:</p> $CurrentYearEnd = Date(Year(PeriodBegDt()), 12, 31)$ <p>In this example, the <code>Year</code> formula is embedded in the <code>Date</code> formula.</p>

Within rule expressions, the system supports nested calls, parentheses, normal algebraic associativity, and operator precedence.

See Also

[Chapter 14, “Understanding Plans and Plan Templates,” Incentive Plan Rules, page 317](#)

[Chapter 14, “Understanding Plans and Plan Templates,” Transaction Allocation, page 311](#)

[Chapter 15, “Defining Plan Templates,” Defining Steps, Sections, and Incentive Plan Rules, page 333](#)

[Chapter 15, “Defining Plan Templates,” Defining Transaction Allocation, page 323](#)

Common Rule Syntax

This section discusses:

- Basic syntax
- Operators
- Formula syntax
- Object access

Basic Syntax

The following table describes the basic syntax that you can use when writing transaction allocation rules and incentive plan rules:

Syntax	Description	Examples
Decimal points	Number constants are expressed with or without a decimal point. If the number has a decimal point, it must have at least one leading digit.	0, 0.0, 125, 0.5, 0.12342, 3.14159
Negative numbers	Numbers may have a leading minus sign to indicate a negative number.	-1.23, -0.5
Percentages	Numbers used to represent percentages have a trailing percent sign to indicate a percentage. Following a number by a percent sign is equivalent to dividing the number by 100.0.	100%: equivalent to (100/100.0) -5.5%: equivalent to (-5.5/100.0)

Syntax	Description	Examples
Quotes	String constants can be enclosed in either single or double quotation marks. In general, you must enclose data values in quotation marks to identify them as data and to distinguish them from variable names.	<p>'This is a valid string'</p> <p>"This is also valid"</p> <p>"This string has 'embedded' single quotation marks"</p> <p>'This string has "embedded" double quotation marks'</p> <p>'' or "" (the empty string, stored in the database as single space)</p> <p>' ' or " " (a single space; the same value as the empty string when stored in the database)</p>
Boolean constants	Boolean constants include True and False and the built-in formulas True() and False().	True, False
Dates	You must represent dates through formulas. The system does not recognize other representations of dates.	<p>YearEndDt(2004) returns the current plan calendar end date for fiscal year 2004.</p> <p>Date(2004,12,31) returns the date December 31, 2004.</p> <p>Year(Date(2004,10,1)) returns a value of 2004.</p>
Case sensitivity	<p>The objects and variables that you use in transaction allocation rules and incentive plan rules are always case-sensitive.. They have a one-to-one relationship with their definitions. Therefore, the case of the objects and variables that you use in your rules must exactly match the case that you define in the object and variable definitions. To use an object and its attribute through a rule, you must write the object class name and the attribute name exactly as they appear in the metadata, as defined on the Object Catalog and Base Catalog pages. To use a plan variable, you must write it exactly as you have defined it for the plan.</p> <p>Note. A prerequisite to writing plan rules is knowing the convention for lowercase and uppercase when registering objects in the metadata catalog. For object attributes, use uppercase, because the tools fields that you import into the metadata object definition automatically appear as uppercase. This provides consistency and makes rule writing easier. For class names, use a consistent naming technique that is easy to recall.</p>	<p>Example for an object and attribute:</p> <p>RawOrderTransaction.AMOUNT = 200</p> <p>RawOrderTransaction is the class name from the object catalog metadata. AMOUNT is the attribute.</p> <p>Example for a declared plan variable:</p> <ol style="list-style-type: none"> 1. Declare the plan number variables <i>PROD_REV_ATTAIN</i> and <i>PROD_REV_ATTAIN_QTR</i> in the variables section of the incentive plan. 2. Use the declared variables, which are case-sensitive, in the incentive plan rule: <p><i>PROD_REV_ATTAIN</i> = <i>PROD_REV_ATTAIN_QTR</i> + Order.SALES_AMOUNT</p>

Operators

There are four types of operators:

- Arithmetic operators
- Comparison operators
- Text concatenation operator
- Operator precedence

Arithmetic Operators

The following table lists arithmetic operators that you can use when writing transaction allocation rules and incentive plan rules:

Operator	Meaning	Example
+ (plus sign)	Addition	3+3
– (minus sign)	Subtraction or negation	3–1 –1
* (asterisk)	Multiplication	3*3
/ (forward slash)	Division	3/3
% (percent sign)	Percent	20%
^ (caret)	Exponentiation	3^2 (the same as 3*3)

Comparison Operators

The following table lists operators to compare two values when writing transaction allocation rules and incentive plan rules. When two values are compared by using these operators, the result is a logical value, either True or False.

Operator	Meaning	Example
= (equals sign)	Equal to	Attainment = Quota
> (greater than sign)	Greater than	Attainment > Quota
< (less than sign)	Less than	Attainment < Quota
>= (greater than or equal to sign)	Greater than or equal to	Attainment >= Quota

Operator	Meaning	Example
<= (less than or equal to sign)	Less than or equal to	Attainment <= Quota
<> (not equal to sign)	Not equal to	Attainment <> Quota
ISIN	<p>Requires a scalar (single value) to the left of the operator and a vector (list) to the right. Returns True if the expression is true and False if it is not. You can use this operator only in transaction allocation rules.</p> <p>The system supports the following syntax:</p> <p><i>SomeValue</i> ISIN <i>SomeList</i></p> <p><i>SomeValue</i> is any single object value (a literal, an attribute of the transaction, an attribute of an object, and so on), and <i>SomeList</i> is a list of like values to which the operator compares <i>SomeValue</i>. If the object value is in the list, the operator returns True. If the value is not in the list, the operator returns False.</p>	<p>Transaction allocation rule example:</p> <p>RawOrderTransaction.PROD_EIM_KEY ISIN Product["PRODUCTS"].EIM_KEY</p> <p>This example checks whether the product on the transaction is one of the products attached to the PRODUCTS node relation on the compensation structure.</p>

Text Concatenation Operator

When writing transaction allocation rules and incentive plan rules, use the ampersand (&) to join one or more text strings to produce a single piece of text. The plan processing engine is optimized for numeric processing, but provides support for simple text manipulation as a convenience. String variables hold a maximum of 254 characters.

As an example, the expression “North” & “wind” produces “Northwind.”

Operator Precedence

The following table lists operator precedence:

Precedence	Operator	Description
1	–	Negation (as in –1)
2	%	Percent
3	^	Exponentiation
4	* and /	Multiplication and division

Precedence	Operator	Description
5	+ and –	Addition and subtraction
6	&	Connects two strings of text (concatenation)
7	= < > <= >= <> ISIN	Comparison

Formula Syntax

Formulas are structured according to type. If, And, Or, and built-in formulas are all structured differently.

Basic Formula Structure

You can use formulas when writing transaction allocation rules and incentive plan rules. When writing formulas in incentive plan rules, you need only write the rule expression; you do not need to declare the rule label.

The basic structure of a formula is as follows:

FormulaName(parameter, parameter, N)

The Managing Formulas chapter provides a list of available formulas and their business uses.

See [Chapter 11, “Managing Formulas,” Reviewing Delivered Formulas, page 258](#).

Access the HTML Help section of the Formula Catalog page for the description, parameters, return results, and examples of a specific formula. You can also access this HTML Help section by clicking the Formula Syntax button in the Transaction Allocation group box on the Plan Definition page.

The Rule Types section of this chapter also provides examples of how to use delivered formulas and how to embed formulas within other formulas.

See [Chapter 12, “Understanding Rule Syntax,” Rule Types, page 269](#).

If Formula Syntax

Transaction allocation rules and incentive plan rules support the evaluation of If expressions using the delivered If formula. Use the If formula to conduct conditional tests on values and formulas. The formula syntax is:

IF(logical_test,value_if_true,value_if_false)

This formula returns one value if a condition you specify evaluates to True and another value if it evaluates to False.

Logical_test is any value or expression that can be evaluated to True or False. This argument can use any comparison operator. For example, Sales > Quota is a logical expression; if the value of the variable *Sales* is greater than the value of the variable *Quota*, the expression evaluates to True. Otherwise, the expression evaluates to False.

Value_if_true is the value that is returned if logical_test is True. For example, if this argument is the expression Order.Credit_Amt × 125%, and the logical test argument evaluates to True, then the IF function returns 125% of the transaction credit amount. If *logical_test* is True and *value_if_true* is omitted, this argument returns 0, or empty value. *Value_if_true* can be any valid expression.

Value_if_false is the value that is returned if *logical_test* is False. For example, if this argument is the expression $\text{Order.Credit_Amt} \times 75\%$, and the *logical_test* argument evaluates to False, then the IF function returns 75% of the transaction credit. If *logical_test* is False and *value_if_false* is omitted, this argument returns a 0, or empty value. *Value_if_false* can be any valid expression.

The engine only evaluates one of the provided parameters, either *value_if_true* or *value_if_false*. This differs from normal formula parameters in which every parameter is evaluated and the result passed to the function. This means that either parameter can have side effects (such as creating rollups or modifying data), and only the correct parameter is run.

Both the true and false parameters are optional; you can write formulas such as the following:

$X = \text{IF}(\text{Amount} > 5000, \text{CreateTransaction}(\dots))$ (no false parameter)

$X = \text{IF}(\text{Amount} > 5000, , \text{CreateTransaction}(\dots))$ (no true parameter)

And Formula Syntax

Transaction allocation rules and incentive plan rules support the evaluation of And expressions using the delivered And formula. Use the And formula to test if all parameters are true. This formula returns True if all its arguments are true; returns False if one or more arguments is false. The formula syntax is:

$\text{AND}(\text{logical1}, \text{logical2}, \dots)$

Logical1, logical2, ... are conditions that you want to test that can be either true or false. The arguments must evaluate to logical values such as True or False.

The following are examples of how the And formula evaluates the parameters:

$\text{AND}(\text{True}, \text{True})$ equals True

$\text{AND}(\text{True}, \text{False})$ equals False

$\text{AND}(2 + 2 = 4, 2 + 3 = 5)$ equals True

Or Formula Syntax

Transaction allocation rules and incentive plan rules support the evaluation of Or expressions using the delivered Or formula. Use the Or formula to test if any parameters are true. This formula returns True if any argument is true; it returns False if all arguments are false. The formula syntax is:

$\text{OR}(\text{logical1}, \text{logical2}, \dots)$

Logical1, logical2, ... are conditions that you want to test that can be either true or false. The arguments must evaluate to logical values such as True or False.

The following are examples of how the Or formula evaluates the parameters:

$\text{OR}(\text{TRUE})$ equals True

$\text{OR}(1 + 1 = 1, 2 + 2 = 5)$ equals False

Built-in Formulas

This table lists and describes formulas that are built into the system. These formulas exist outside of the formula catalog. However, you can use them to write your transaction allocation rules and incentive plans rules the same as you would use formulas in the catalog.

Formula Syntax	Description
NOT(logical)	<p>Reverses the value of its argument. Use Not to make sure that a value is not equal to another value.</p> <p>The formula syntax is as follows:</p> <p>NOT(<i>logical</i>)</p> <p><i>Logical</i> is a value or expression that can be evaluated to true or false. If logical is false, Not returns True; if logical is true, Not returns False.</p> <p>Examples:</p> <p>NOT (False) equals True</p> <p>NOT(1 + 1 = 2) equals False</p>
TRUE()	Same as the True boolean constant. This formula is included for compatibility with commonly used spreadsheet applications.
FALSE()	Same as the False boolean constant. This formula is included for compatibility with commonly used spreadsheet applications.

See Also

[Chapter 11, “Managing Formulas,” page 239](#)

Object Access

Objects are accessed differently for the two types of rules.

Note. When accessing any object, you can access either the base class attributes or the derived class attributes of the object.

Object Access Through Transaction Allocation Rules

The following table lists the objects that you can access through transaction allocation rules, shows examples, and provides explanations:

Object	Examples	Explanation
Staged Transaction	<p>Example 1:</p> <p>RawOrderTransaction.AMOUNT > 1200 USD</p> <p>Example 2:</p> <p>RawOrderTrasnsaction.GROSS_PROFI > 1200 USD</p>	<p>Example 1:</p> <p>The amount of the staged raw order transaction is greater than 1200 USD. In this example, the AMOUNT attribute comes from the base class object.</p> <p>Example 2:</p> <p>The gross profit of the staged raw order transaction is greater than 1200 USD. In this example, the GROSS_PROFIT attribute comes from the derived class object.</p> <p>Note. You can access all staged transaction types (raw order transaction, raw opportunity, and raw performance metric) using this syntax.</p>
Participant	RawOrderTransaction.PCPN_EIM_KEY = Person.EIM_KEY	The participant on the raw order transaction is the same as the participant attached to the current node on the compensation structure through a participant relationship.
Territory	RawOrderTransaction.TERRITORY_ID= CompObjectTerritory.EIM_KEY	The territory on the raw order transaction is the same as the territory for the current node on the compensation structure.
Reference Objects	<p>Example 1:</p> <p>RawOrderTransaction.PROD_EIM_KEY ISIN Product["PRODUCTS"].EIM_KEY</p>	<p>Example 1:</p> <p>The product on the raw order transaction is the same as the product attached to the PRODUCTS node on the compensation structure through a reference association.</p> <p>Note. You must further qualify which reference association is applicable by stating the relationship name in the rule. Also, you can access one reference object or a group of reference objects.</p>

Object Access Through Incentive Plan Rules

When referencing objects in incentive plan rules, the objects serve a different function depending on whether you place the object in the rule label (right side of the rule) or the rule expression (left side of the rule). If you reference the object in the rule label, the system updates the value of the object. If you reference the object in the rule expression, the system accesses the object and returns its value.

You can access any effective-dated version of objects in incentive plan rule expressions. You cannot update objects in the rule label using effective-dated syntax, however. The syntax is:

ObjectClassName[AsOf_Date].Attribute

AsOf Date is a formula that returns a date value. The engine determines which object instance based on the object's effective-date entries in the database.

The following table lists the objects that you can access through incentive plan rules, shows examples, and provides explanations:

Object	Examples	Explanation
Production Transaction	<p>Example 1:</p> <p>= Order.AMOUNT</p> <p>Example 2:</p> <p>= Order.GROSS_PROFIT</p>	<p>Example 1:</p> <p>Accesses the amount attribute from the base class object for the order transaction.</p> <p>Example 2:</p> <p>Accesses the gross profit attribute from the derived class object for the order transaction.</p> <p>Note. You can access all production transaction types (order, account, performance metric, and so on) using this syntax.</p>
Participant	= Person["2001"].JOB_CODE	<p>Accesses the job code attribute from the derived class object for the participant and returns the job code of participant 2001.</p> <p>Note. You must always qualify the EIM_KEY of the participant, which is the participant ID.</p>
Territory	=CompObjectTerritory.TREE_NAME	<p>Accesses and returns the tree name of the current node that the system is processing.</p> <p>Note. You can use the territory object only on the rule expression side of the incentive plan rule equation to access the territory. You cannot use the territory object in the rule label to update the territory.</p>

Object	Examples	Explanation
Reference Objects	<p>Example 1:</p> <p>= Product[Order.PROD_EIM_KEY].COMM_PCT</p> <p>Example 2:</p> <p>= Product["1001"].COMM_PCT</p>	<p>Example 1:</p> <p>Accesses the commission percentage attribute of the product on the order transaction.</p> <p>Example 2:</p> <p>Accesses the commission percentage attribute for product 1001.</p> <p>Note. This syntax is valid for all of the reference object types—channel, customer, geography, industry, numeric range, and product. Because there are multiple reference object types, you must qualify which reference object type is applicable. Within the reference object type, you must further specify the ID of the object that you are referencing to distinguish it from others of the same type.</p>
Plan Variables	<p>Example 1:</p> <p><i>X</i> = Date(2003, 1, 1)</p> <p>= <i>MTH_ATT</i>N[<i>X</i>]</p> <p>Example 2:</p> <p><i>AttainmentQTD</i> = Transaction.AMOUNT</p>	<p>Example 1:</p> <p>Accesses the monthly attainment value through the local variable as of January 1, 2003.</p> <p>Example 2:</p> <p>Updates the plan variable for quarterly attainment based on the amount of the current transaction being processed.</p> <p>You can access or update any effective-dated version of plan variables in incentive plan rule expressions. The syntax is:</p> <p><i>VariableName</i>[<i>AsOf_Date</i>]</p> <p><i>AsOf_Date</i> is a formula that returns a date value. The engine determines the variable instance based on the variable's calendar and frequency.</p>

Syntax Specific to Incentive Plan Rules

This section discusses:

- Aggregators
- Accesses

- Access methods

Note. Multi-value variables (such as compound numbers, quotas, and aggregators) cannot be on the right-hand side of a rule. You can set or retrieve multi-value variables only through accesses and formulas. The system determines single versus multi value variables based on the value that you set for the extended attribute string “SingleValueVariable” (either Y or N) of the variable object on the Object Catalog page.

Aggregators

An aggregator is a type of variable that accumulates details. Each aggregator collects details in its own accumulator bucket. Aggregators have no frequency or initial value attributes. They are therefore able to accumulate detail into a single accumulator that spans all frequencies, and are not confined to a single instance of an initial value.

Because aggregators are variables, you define them in the variable area of configuration plans and incentive plans. For example, you might define an aggregator for total sales called *TOTAL_SALES*. To define aggregators, click the Insert button in the Variables region of the Plan Definition 2 page and select *Aggregator* from the variable types.

Aggregators determine the details to accumulate according to the rule expression that you define in your configuration plan or incentive plan for a specific aggregator. After you define an aggregator, you must write a general rule in the plan to define what the aggregator accumulates. For example, to accumulate the total of transaction sales amounts, you can write the following general rule:

TOTAL_SALES = TRANS_SALES_AMOUNT

This rule states that the *TOTAL_SALES* aggregator accumulates all transaction sales amounts into the corresponding accumulator bucket.

Aggregators determine the relevant data to aggregate according to:

- The current run context.
- The date associated with the entry in the accumulator bucket (ASOF_DATE).
- Formula parameters or access definitions.

You can update aggregators through assignment. For example, to update the *TOTAL_SALES* aggregator to order sales amount, you can write the following general rule:

TOTAL_SALES = ORDER.SALES_AMOUNT

Sales Incentive Management provides sample aggregators as part of the delivered configuration plans and incentive plans.

See Also

[Chapter 12, “Understanding Rule Syntax,” Syntax Specific to Incentive Plan Rules, page 282](#)

[Chapter 15, “Defining Plan Templates,” Defining Variables, page 326](#)

[Chapter 14, “Understanding Plans and Plan Templates,” Variables, page 312](#)

Accesses

This section discusses:

- Access usage

- Access references
- Delivered accessors

Access Usage

Accesses are stored as a collection within an accessor, similar to how records are stored as a collection within a view. Accessors are objects that hold the access definitions that you use in the right-hand side of the incentive plan rule to access an aggregator's or compound number's value. Accesses call values from aggregator or compound number variables. Each access definition within an accessor tells the system how to get values out of the aggregator or compound number. The access definition specifies the frequency, method of access (sum, average, minimum, or maximum), and an offset measured in periods.

You define accessors and their access definitions within the variable area of configuration plans and incentive plans. To define accessors and their access definitions, click the Insert button in the Variables region of the Plan Definition 2 page and select *Accessor* from the variable types. The system displays a grid for you to specify the access definitions and their attributes. These attributes include frequency, method of reference, relative period, and whether to replicate results to reporting.

When defining an accessor, first specify the accessor name and the variable that it accesses. Then, within the access definition, specify the details of how that access definition accesses the variable. For example, perhaps you have created an aggregator for total sales called *TOTAL_SALES*, and you want to define an accessor that enables you to access that aggregator to accumulate sales totals monthly, quarterly, annually, and for the prior three months according to the current period. You might define an accessor called *TOTAL_SALES_ACC* that accesses the *TOTAL_SALES* aggregator variable, then specify the following access definitions within the accessor, as described in the following table:

Access Name	Frequency	Method	Current /Prior/Future	Start Period	End Period	Reportable
TOTAL_SALES_MTH	Monthly	Sum	Current to date	Not applicable	Not applicable	Yes
TOTAL_SALES_QTR	Quarterly	Sum	Current to date	Not applicable	Not applicable	Yes
TOTAL_SALES_ANN	Annual	Sum	Current to date	Not applicable	Not applicable	Yes
TOTAL_SALES_LAST_3_MTH	Monthly	Sum	Prior	3	1	No

Each access definition in the accessor defines the details to return from the variable. You use the access names in incentive plan rules to identify the access definition within the accessor to apply against the aggregator or compound number variable. The access names in the previous table return the following results:

Access Name	Returns
TOTAL_SALES_MTH	The sum of the <i>TOTAL_SALES</i> aggregator entries that fall within the current month.
TOTAL_SALES_QTR	The sum of the <i>TOTAL_SALES</i> aggregator entries that fall within the current quarter.

Access Name	Returns
TOTAL_SALES_ANN	The sum of the <i>TOTAL_SALES</i> aggregator entries that fall within the current year.
TOTAL_SALES_LAST_3_MTH	The sum of the <i>TOTAL_SALES</i> aggregator entries from the prior three months.

Access definition attributes enable you to create flexible definitions that you can then reference in incentive plan rules, using the access name, to return specific results from the aggregators or compound numbers. Accesses make rule writing easier because you only need to reference the access name in the rule rather than define the attributes each time you write the rule. You can create multiple access definitions within an accessor, using the attributes to define specific details to extract from the variable. Each access definition corresponds to a different way of accessing the variable.

Like other variable names, access names have to be unique within a plan. Access names cannot repeat from one accessor to another and cannot match the name of another variable, even the variable they access. This ensures that unique access names are always used in incentive plan rules and transaction allocation rules.

There are certain restrictions for using access names within rules. When writing rules, the access name cannot appear in the left-hand side of the rule. When updating aggregators, you can only do so using the aggregator variable name. When updating compound numbers, you can only do so through certain formulas.

Using the *TOTAL_SALES_ACC* accessor as an example to demonstrate how to use an access definition to access variables through rules. The *TOTAL_SALES_ACC* accessor accesses the *TOTAL_SALES* variable. You have already defined the *TOTAL_SALES* variable to be an aggregator that accumulates the total of transaction sales amounts. This is done by defining the general rule *TOTAL_SALES = TRANS_SALES_AMOUNT* in the plan. To aggregate total sales for the current month to date, you can write the following rule:

SomeVa r = TOTAL_SALES_MTH

TOTAL_SALES_MTH is the access name within the *TOTAL_SALES_ACC* accessor, which accesses the *TOTAL_SALES* aggregator. Thus, when you run the stated rule, the system accumulates the total of all transaction sales within the *TOTAL_SALES* accumulator bucket for the current month to date.

The Understanding Plan Templates and Plans chapter provides descriptions of the access definition attributes.

See [Chapter 14, “Understanding Plans and Plan Templates,” page 307](#).

Sales Incentive Management provides sample accessors and their access definitions as part of the delivered configuration plans and incentive plans.

Access References

Within incentive plans, you can reference accesses that are in configuration plans just like you can reference any other variable. The access definition that you reference must access a variable in the configuration plan, not a variable in the incentive plan.

The following example illustrates how to reference accesses that are in configuration plans.

You have a configuration plan called REGN-CP. Within that configuration plan, you have defined the following variables:

- *TOTAL_SALES* aggregator variable.
- *TOTAL_SALES_ACC* accessor.

The `TOTAL_SALES_ACC` accessor accesses the `TOTAL_SALES` aggregator and has the following access definitions:

- `TOTAL_SALES_MTH`
- `TOTAL_SALES_QTR`
- `TOTAL_SALES_ANN`.

Now let's assume that you also have an incentive plan called `SALES-IP`. Within that incentive plan, you want to calculate the total monthly sales amounts for orders in the region. Complete the following steps within the `SALES-IP` incentive plan:

1. Create a reference variable called `TOTAL_SALES` that references the `TOTAL_SALES` aggregator in the `REGN-CP` configuration plan.

This associates the aggregator in the incentive plan with the aggregator in the configuration plan.

2. Create another reference variable called `TOTAL_SALES_MTH` that references the `TOTAL_SALES_MTH` access definition, which is defined in the `TOTAL_SALES_ACC` accessor of the `REGION-CP` configuration plan.

This associates the access definition in the incentive plan with the access definition in the configuration plan.

3. Write the following general incentive plan rule to define what the `TOTAL_SALES` reference variable accumulates:

`TOTAL_SALES = ORDER.SALES_AMOUNT`

4. Write another incentive plan rule that uses the `TOTAL_SALES_MTH` reference variable, such as:

`LocalRgnMth = TOTAL_SALES_MTH`

When you run the incentive plan, the `TOTAL_SALES` aggregator variable in the `REGN-CP` plan accumulates the total sum of sales amounts into the `TOTAL_SALES` accumulator. The system references the `TOTAL_SALES` accumulator because the `TOTAL_SALES` and `TOTAL_SALES_MTH` reference variables in the `SALES-IP` incentive plan reference the `TOTAL_SALES` aggregator and `TOTAL_SALES_MTH` access definition in the `REGN-CP` configuration plan. According to incentive plan rules, the system calculates the total monthly sales amounts for orders in the region from the `TOTAL_SALES` accumulator and stores the value in the `LocalRgnMth` local variable.

Access Methods

To get valuable information (such as monthly, quarterly, and annual totals) from an aggregator or compound number, you can choose between two access methods: formulas or accesses. They are interchangeable. The method that you choose depends on how frequently you use and report on the aggregator or compound number.

Some advantages of using accesses to access aggregators and compound numbers rather than formulas are as follows:

- If you use the aggregators and compound numbers frequently, accesses are shorter to type into the rule and are thus more efficient.
- Accesses potentially have better performance than formulas, because formulas have more involved processing.

When using aggregators or compound numbers with formulas, the system needs to analyze the formula, calculate the value, and return results every time you run the formula. In contrast, the system analyzes an access definition only once and caches this information in memory for future retrieval.

- It is easier to replicate aggregator and compound number results to reporting through accesses rather than formulas.

With accesses definitions, you can select the Reportable check box for each access definition within the accessor. This enables you to use the access name in reporting just like you would with any other variable, thus making reporting easier. With formulas, you must store the results of the formula within another number variable and then have the system replicate and report on that variable. Aggregators and compound numbers themselves do not replicate to reporting.

Some advantages of using formulas to access aggregators and compound numbers rather than accesses are as follows:

- You only need to use the value once, such as using the prior month one place only in the plan, because formulas require less setup.
- The formula syntax is easier to recall than the variable and access names.

As an example of using a formula to access an aggregator, say that you want the monthly, quarterly, and annual transaction sales amount totals. Using the *TOTAL_SALES* aggregator, you write the following three rules:

SomeVar = VariableValue(*TOTAL_SALES*, Monthly, 0)

SomeVar = VariableValue(*TOTAL_SALES*, Quarterly, 0)

SomeVar = VariableValue(*TOTAL_SALES*, Annual, 0)

These formulas use three parameters: aggregator, frequency (period of time in which the variable is conceptually reset), and initial value. The aggregator is *TOTAL_SALES*, the frequency is either Monthly, Quarterly, or Annual, and the initial value is 0. The first formula calculates the sum of the detail from the *TOTAL_SALES* accumulator for the current month starting at zero. The second formula calculates the sum for the current quarter. The third formula calculates the sum for the current year.

Note. If you need to seed an initial value for an aggregator or compound variable, you can do so only through the formula access method.

You can use the following formulas to access aggregators and compound numbers:

- Relative single period formulas: VariableValue, AvgForPeriod, MaxForPeriod, MinForPeriod, CountForPeriod.
- Relative multiple period formulas: SumPeriods, AvgForPeriods, MaxForPeriods, MinForPeriods, CountForPeriods.
- Date range formulas: SumDates, AvgForDates, MaxForDates, MinForDates, CountForDates.

The Managing Formulas chapter provides overview information, a list of formulas, reasons to use each formula, and when to use each formula.

See [Chapter 11, “Managing Formulas,” page 239](#).

For further details about each formula—including descriptions, parameters, return value, and examples—navigate to the Formula Catalog page. Select Compensation, Sales Incentives, Define Sales Incentives Options, Formula Catalog.

The Accesses section of this chapter provides an example of using an access definition to access a variable.

See [Chapter 12, “Understanding Rule Syntax,” Accesses, page 283](#).

CHAPTER 13

Working with Compensation Structures

This chapter provides an overview of compensation structures and discusses how to:

- Define a compensation structure hierarchy.
- Associate reference and participant objects with nodes.
- Clone a compensation structure.
- View compensation structure summaries.

Understanding Compensation Structures

This section discusses:

- Compensation structures.
- Compensation structure hierarchy.
- Product category and market template.
- Versioning.
- Compensation objects and relationships.
- Compensation structure security.
- User interaction objects (UIOs).
- Compensation structure creation.
- Integration with PeopleTools Tree Manager.

Compensation Structures

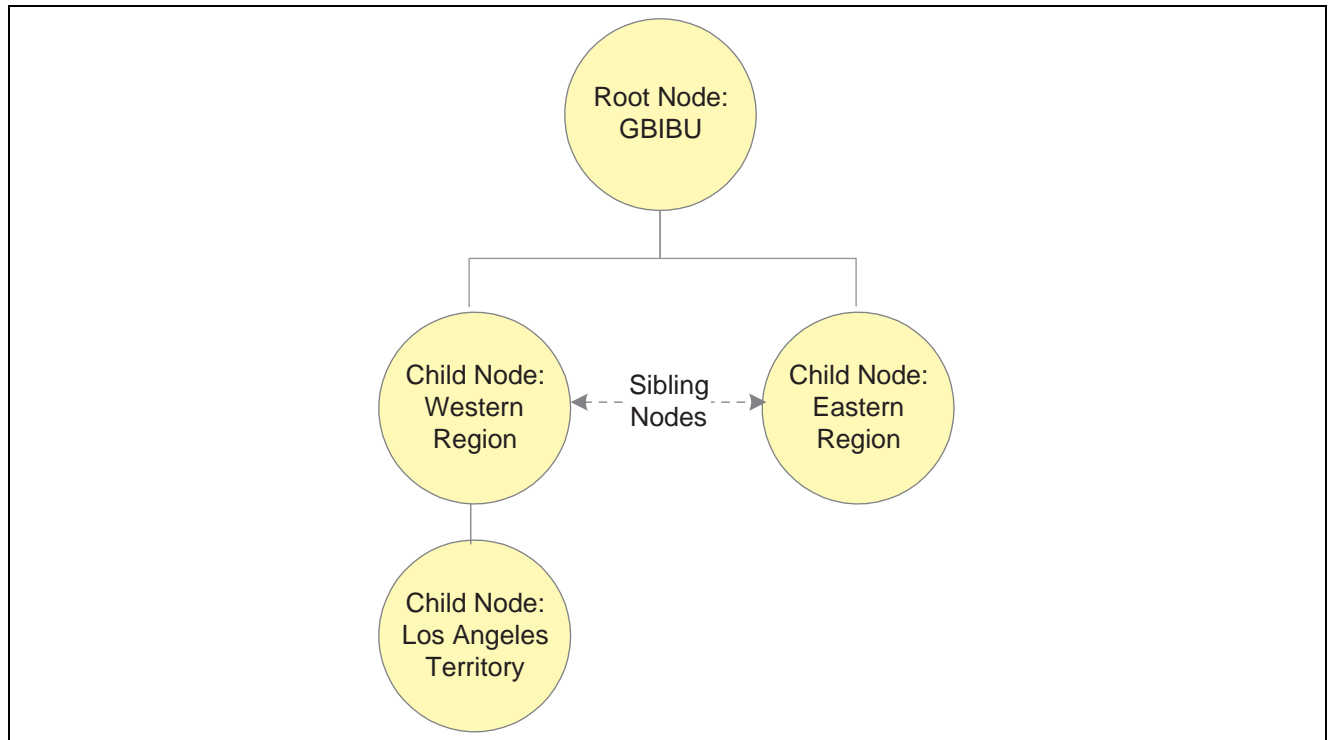
Sales Incentive Management enables you to define compensation structures to represent your sales organization based on a territory hierarchy. Typically, the compensation structure is based on a hierarchical representation and imported from a source system, such as the territory tree from PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM).

Compensation structures are composed of compensation objects, which are the hierarchically-arranged nodes on the structure. Compensation objects represent your territories, which are further defined by the products, customers, industries, participants, and so on that are associated with a territory within your sales organization.

Compensation Structure Hierarchy

The compensation structure consists of nodes that are arranged in a hierarchy of parent and child nodes. The top (root) node of a compensation structure is a business unit. A business unit can have multiple compensation structures attached to it, but each compensation structure can have only one root node. The tree nodes inherit the attributes of the root node.

This diagram shows the compensation structure nodes:



Compensation structure nodes

A single business enterprise often has multiple business units within its organization; furthermore, business units are often required to roll up to other business units. To accommodate this, Sales Incentive Management allows compensation structures to be connected to other compensation structures, ensuring that each structure has only one business unit, but at the same time permitting considerable flexibility in how a business enterprise is represented.

Each compensation structure has a compensation administrator associated to the root node. If a compensation administrator has access to the business unit, they have access to all compensation structures belonging to that business unit.

Besides business unit, there are several other attributes defined at the root of each structure. For example, the language associated with the root node determines the language used for UIOs created in batch mode, specifically batch-created reports. The business unit also determines the currency and calendar used for nodes on the structure.

You can connect compensation structures together to form a “tree of trees” by associating a structure with a node on another structure. You can view a summary of your compensation structures so that you can see how they link together, making navigation easier.

The compensation structure and associated compensation objects comply with the Sales Incentive Management object model, which means that all compensation objects derive from a base class containing the common attributes of all compensation objects, regardless of their type. Different types of compensation objects are grouped together into derived classes, which contain attributes unique to that type. For Sales Incentive Management, the delivered compensation object-derived class types are root type (business unit) and territory type. Because compensation objects comply with the object model, compensation objects are available to Sales Incentive Management processing engines and Query Builder, enabling you to easily extend and configure these objects to adapt them to your business needs. You can also add your own derived classes if the delivered classes don't meet your requirements.

Each compensation node on the structure is effective-dated and has its own properties, although the uniqueness of each node is really defined by its relationships. Nodes have a rollup layer, which is used by plan rules to determine rollups for transactions. Rather than having to name a node explicitly to roll up to, the rule specifies a layer, and the engine traverses the compensation structure hierarchy to find a node in that layer. Using rollup layers allows the use of general rules that are not tied to a specific compensation structure.

Product Category and Market Template

Each structure is associated with a product category and market template, which control the behavior of structure objects. The product category and market template associated with a compensation structure determine which compensation objects, relationships, participant objects, reference objects, and UIOs that you can associate with the structure. Product category and market template also specify the default plan for the structure.

The market template provides a starting point for creating a compensation structure and serve as a convenient filtering mechanism during the early development of the structure. Once you select a market template, you can choose from any of the plans associated with that market template.

Versioning

The compensation structure, as well as each node on the structure, is effective-dated. A structure can also be identified as inactive, draft, or runnable. A compensation administrator can take a structure out of the runnable state while it is being modified or completed. Only compensation structures in a runnable state are available for processing.

Compensation Objects and Relationships

To resolve incentive plans and process transactions, Sales Incentive Management requires information about how the various compensation objects fit into a compensation structure, including the relationships between those objects. To achieve this, Sales Incentive Management uses reference objects and participant objects (the business objects), and different types of relationships.

Relationships allow compensation objects to have extended, meaningful attributes to drive incentive calculation. Relationships join nodes, participants, and plans. Each relationship has a name, which can be referenced by incentive plan rules and transaction allocation rules. Like other types of system objects, relationship objects are registered in metadata as classes, making them available for the Query Builder.

Relationships allow the compensation structure nodes to be defined fully and enable correct transaction processing. The system uses relationships to:

- Determine how to handle the reference and participant objects that are associated with a compensation object. The system processes the different types of objects in different ways.
- Determine how compensation structure objects relate to the object to which they are associated.

- Determine compensation structure security.

Sales Incentive Management uses the following relationship types:

- Access.

Enables you to control access to a node. This relationship type is similar to the Participants relationship. You use Access relationships to grant non-compensated users access and other security privileges at certain points on the compensation structure. The system does not calculate incentive for participants associated with a node using this type of relationship because there is no incentive plan for that node (and therefore no plan context). You can also use Access relationships to define workflow routings.

- Configuration plan.

Enables you to associate configuration plans with a node. Configuration plans are attached to a node and contain common variables and allocations for plans that are lower down the tree on the same node.

- Connection.

Enables you to connect compensation structures. This ability allows each individual compensation structure to be of a manageable size and scope, and allows a correspondence between business unit and root nodes. When viewing compensation structure summaries, secondary structures appear under the node of the primary structure in the hierarchy.

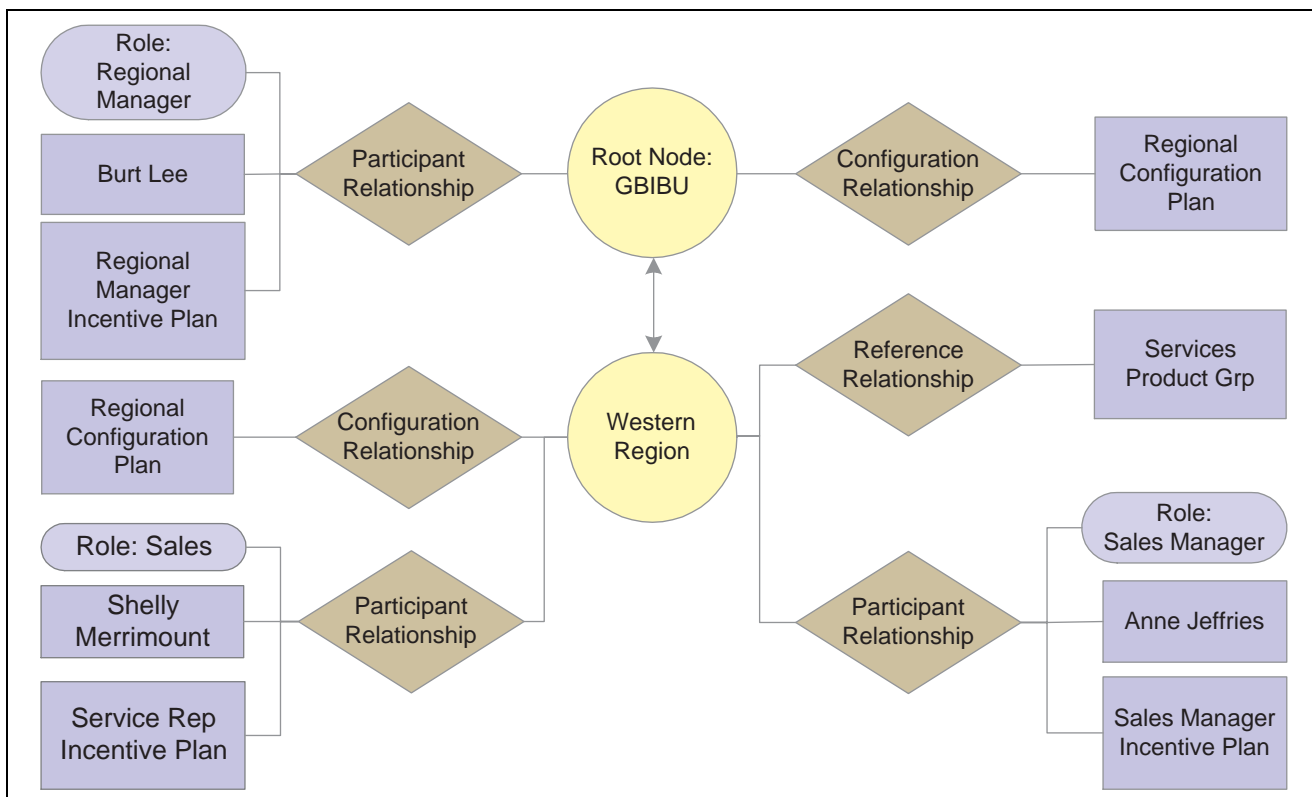
- Participants.

Enables you to associate participants and participant groups with a node. The Participants relationship specifies a role, a plan, multiple participants, and multiple UIOs. The Participants relationship also includes UIO security settings.

- Reference.

Enables you to associate different types of reference objects—customers, products, regions, for example—with a node, bringing attributes of those reference objects in scope for processing that node. Reference relationships can associate single reference objects or reference groups. To increase flexibility, relationship members can be flagged as exclusionary. You can only select reference objects included in the market template associated with the compensation structure.

This diagram shows an example of the possible nodes and relationships:



Nodes and relationships

Compensation Structure Security

Security in compensation structures is driven primarily through relationships, which enable you to specify, for a specific node, which participants can view what information. For example, on a specific node, a manager might be able to view information for direct reports, but not for other managers. On a child node, the same manager might be able to view information for both sales persons, as well as subordinate sales managers.

A security definition is created for each instance of a participant on a compensation structure.

UIOs

When defining a Participant relationship, UIOs are specified as part of that relationship. The ability to tie these components together allows role-based and row-based security to be resolved at the same time. UIOs define the type of information that participants can view, while the location of the participants in the hierarchy and the relationship security options define which rows of data they can view.

Compensation Structure Creation

When defining your compensation structures, each compensation structure can have only one business unit.

To view a compensation structure node when viewing a compensation structure, the node must have an effective date that is less than or equal to the effective date of the compensation structure. The system forces an effective date for every effective-dated version of that tree. You can create as many additional effective-dated rows as you need depending on how your structure changes (participants are added or deleted, plans change, and so on). There must be at least one compensation object associated with the compensation structure that has an effective date matching the effective date of the structure.

During allocation, some transactions, due to data errors such as incomplete transaction data or missing reference data, may be left unallocated and require manual processing. This process is known as *transaction claiming*. When defining your organization structure, you can create a special node on your territory tree structure to act as a net to capture these unallocated transactions. The claiming node uses the transaction allocation rules of its parent node, but excludes transactions claimed by other peer nodes. You associate a plan to the claiming node that assigns the unclaimed transactions to a nearby node, enabling you to process these unallocated transactions manually by using the update transaction components specific to each of the market templates.

Integration with PeopleTools Tree Manager

Sales Incentive Management leverages existing PeopleTools Tree Manager functionality to define compensation structures. The same hierarchical information is stored both in the Tree Manager tables and the Sales Incentive Management tables. Sales Incentive Management stores the information so that the system does not have to perform a join to the Tree Manager tables while traversing compensation structures during engine processing.

As information is stored in both Tree Manager and Sales Incentive Management tables, Tree Manager ensures that compensation objects remain synchronized with the Tree Node (PSTREENODE) and Tree Definition (PSTREEDEFN) tables. For example, if a compensation object is deleted from the tree, the system updates the compensation object status to *Inactive* from the effective date when it was deleted from the Tree Node table.

Note. Sales Incentive Management compensation structures *do not* support the Tree Manager Branching functionality.

Note. You should *only* view your compensation structures using Sales Incentive Management components. You should *never* edit your structures when viewing via the Tree Manager component.

Defining a Compensation Structure Hierarchy

To define a compensation structure hierarchy, use the Create Compensation Structure (EI_CSTR_ADD) and Tree Manager (EI_TREEMGR) components.

This section discusses how to:

- Define a new compensation structure.
- Insert a child node or sibling node.
- Maintain an existing structure.

Note. When defining a new compensation structure hierarchy, you can only add a child node to a root node. You can add a sibling node or a child node to any node that is not a root node.

Prerequisites

Before defining a compensation structure hierarchy, define your business units.

Pages Used to Define a Compensation Structure Hierarchy

Page Name	Object Name	Navigation	Usage
Create Compensation Structure	EI_COMPSTRUCT_ADD	Compensation, Sales Incentives, Define Sales Org Structure, Create Compensation Structure, Create Compensation Structure	Add a new compensation structure.
Insert Child Node	PSTREENODEADD	Compensation, Sales Incentives, Define Sales Org Structure, Create Compensation Structure, Create Compensation Structure Click the Save and View Comp Structure button, and then click the Insert Child Node button.	Add a child node.
Insert Sibling Node	PSTREENODEADD	Compensation, Sales Incentives, Define Sales Org Structure, Create Compensation Structure, Create Compensation Structure Click the Save and View Comp Structure button, and then click the Insert Sibling Node button.	Add a sibling node.
Tree Manager	PSTREEMGR	Compensation, Sales Incentives, Define Sales Org Structure, Maintain Comp Structure, Tree Manager	Update an existing compensation structure.

Defining a New Compensation Structure

Access the Create Compensation Structure page.

Create Compensation Structure

*Compensation Structure GLOBAL

*Effective Date 09/21/2004 *Status Active

*Business Unit GBIBU

*Description Global Compensation Structure

Product Category Sales Incentive Management

Market Template

Calendar ID 01 Monthly Calendar - 01

Language Code English

Comp Structure State Draft

Default Comp Administrator SIM1

☒ Use for Security Groups

Save Save and View Comp Structure

Create Compensation Structure page

Use the Create Compensation Structure page to create the root node for your compensation structure tree. This page is only accessible when creating a new root node.

Compensation Structure	Enter the name of the compensation structure that you are creating. The name can contain up to 18 characters.
Product Category	Select <i>Sales Incentive Management</i> .
Market Template	Select the appropriate market template for the structure. This determines which objects you can select as nodes.
Calendar ID	Enter the calendar that is to be used for all nodes on this compensation structure. You can only choose a calendar that has been defined for the selected business unit.
Language Code	Select the language code applied to the nodes.
Comp Structure State (compensation structure state)	Values are <i>Draft</i> , <i>Inactive</i> , or <i>Runnable</i> . Only compensation structures in a runnable state are available for processing.
Default Comp Administrator (default compensation administrator)	Enter the person who is to receive emails generated by sales participants who are reporting problems.
Use for Security Groups	Select this check box to indicate that the tree is used for security groups whose information is imported from PeopleSoft Enterprise CRM.

Inserting a Child Node or Sibling Node

Access the Insert Child Node page to insert a node immediately under a parent node.

Access the Insert Sibling Node page to insert a node on the same level as the selected node. If you selected a root node, you can only insert a child node.

Insert Child Node/Insert Sibling Node

Tree Node

Enter the name of the tree node that you are adding. This is an editable text field.

Note. Click the Look Up Tree Node button to display the names of existing tree nodes for the compensation structure. If you try to add an existing node name, the system displays this error message: “Duplicate instances of name XXX. The specific node exists in multiple places. It can only exist in one place. Find the appropriate place and delete all other instances.”

When you add a new node (child or sibling), the system takes you to the Maintaining Compensation Structure - Maintain Territory page.

Maintain Compensation Structure - Maintain Territory

Territory Type

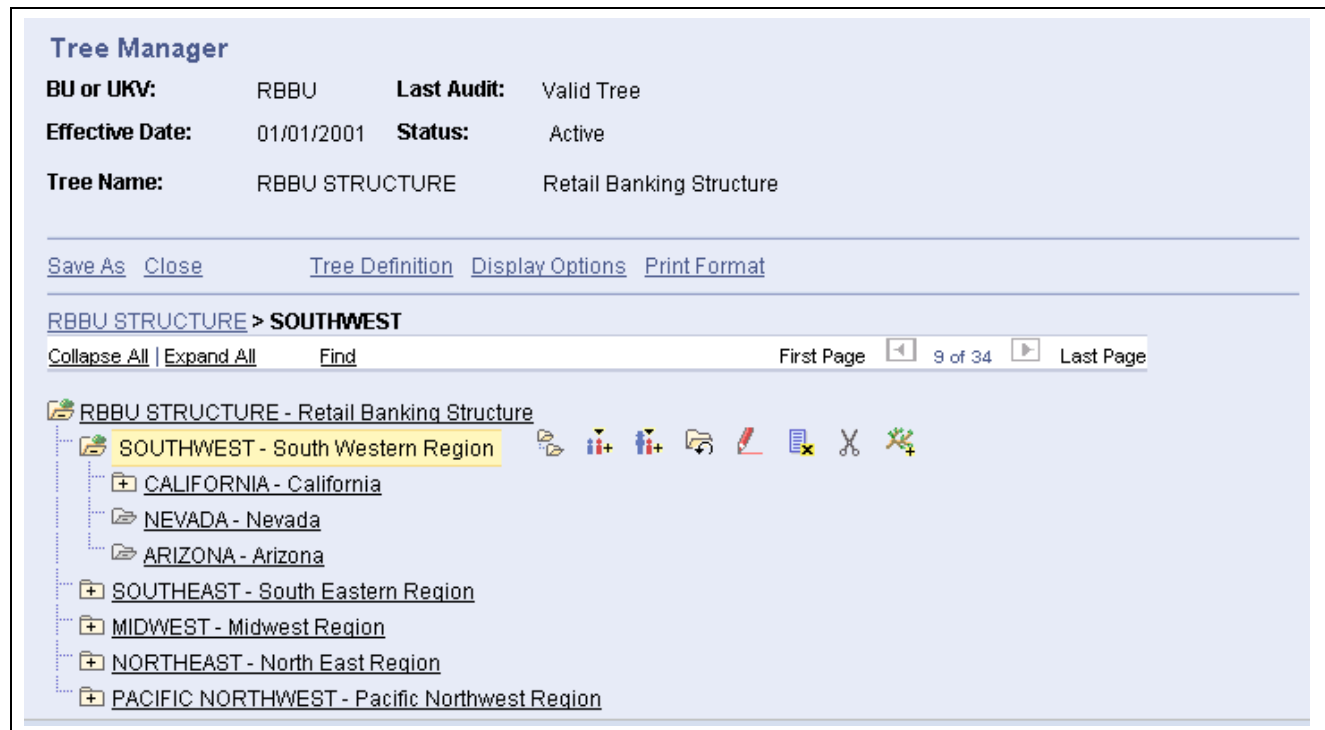
Select *Territory*. All child and sibling nodes represent a territorial division of your compensation structure. The root node of the structure is automatically assigned *Rootas* the territory type.

You do not have to add any relationships to the node at the time that you add the node to your compensation structure.

See [Chapter 13, “Working with Compensation Structures,” Associating Reference and Participant Objects with Nodes, page 298.](#)

Maintaining an Existing Structure

Access the Tree Manager page using the Maintain Compensation Structure component to select an existing compensation structure that you want to edit.



Tree Manager page

Note. Always access the Tree Manager page using the Maintain Compensation Structure component.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager

Associating Reference and Participant Objects with Nodes

To associate reference and participant objects with nodes, use the Maintain Comp Structure (EI_CO_BASE_TBL) component. Use the EI_CI_COMP_STR_SAVE component interface to load data into the tables for this component.

This section discusses associating a reference or participant object with a node.

You associate reference and participant objects to nodes (territories) by using a relationship. The relationship type that you select determines the type of object that you can attach. Use the Maintain Compensation Structure page to associate an object with a selected territory or modify existing territory information.

When you search with Query Builder from this page, Query Builder only returns results that are relevant to the relationship type that you select.

Prerequisites

Before associating reference and participant objects with nodes, define:

- Reference and participant objects.
- EIM roles.

- Plans and plan templates.
- UIOs.

See Also

[Chapter 3, “Defining Sales Incentive Management General Options,” page 27](#)

[Chapter 10, “Managing Reference and Participant Objects,” page 211](#)

[Chapter 5, “Managing User Interaction Objects,” page 91](#)

[Chapter 15, “Defining Plan Templates,” page 319](#)

Page Used to Associate Reference and Participant Objects with Nodes

Page Name	Object Name	Navigation	Usage
Maintain Compensation Structure	EI_CO_BASE_TBL	Compensation, Sales Incentives, Define Sales Org Structure, Maintain Comp Structure, Maintain Compensation Structure Compensation, Sales Incentives, Define Sales Org Structure, Compensation Structure Summary, Compensation Structure Summary Click the Edit Data button.	Associate reference and participant objects with a node.

Associating a Reference or Participant Object with a Node

Access the Maintain Compensation Structure page.

Maintain Compensation Structure

Maintain Territory

Territory ID GBIBU STRUCTURE **Compensation Structure** GBIBU STRUCTURE

Business Unit GBIBU GBIBU

***Effective Date** 01/01/2001 **Status** Active

***Territory Type** Root **Description** GBI US

Rollup Layer [Search]

Product Category Sales Incentive Management **Language Code** English

Market Template High Tech & Industrial **Currency** USD

Default Comp Administrator SIM1 **State** Runnable

☒ **Use for Security Groups** **Calendar ID** 00 HT Template Calendar (SIM)

Maintain Compensation Structure page (1 of 2)

[Collapse All Relationships](#) [Expand All Relationships](#)

Details Find First 1-2 of 2 Last

***Relationship Type** Configuration Plan **Name** REGN_VARS

Configuration Plan Details

***Plan ID** REGN-CP Regional Config Plan
[View Plan](#)

***Relationship Type** Participant **Name** Business_Unit_Manager

Participant Details

Role Regional Manager ☐ Can View Others on Same Node
Plan ID RMGR-IP Regional Manager Plan ☒ Can View Children Nodes
[View Plan](#)

Participants Find View All First 1 of 1 Last

*Select	Exclude	Type	*Participant ID	Name	Overrides	Variables
1 Individual	<input type="checkbox"/>	Sales Person	KU0127	Lee,Burt		

User Interactive Objects Find First 1 of 1 Last

*Select	Exclude	Type	*UIO ID	Description
1 Group	<input type="checkbox"/>		100000	

Updated On 01/31/03 3:08:47PM **by** DVP1 **Load Date/Time**

* Required Field

OK Cancel Apply Refresh

Maintain Compensation Structure page (2 of 2)

Use the Maintain Compensation Structure page to add reference and participant objects to the root node or child and sibling nodes on your compensation structure. For the root node, the page displays the default values for language code, currency, and calendar and compensation administrator, as well as the product category and market template.

Details

Relationship Type

The relationship type that you select determines the fields that are available in the Detail row that you add. Your choices are:

- *Access*: Defines participant access privileges for that node.
- *Configuration Plan*: Select to attach a configuration plan to the selected node. Configuration plans hold common variables allocation information and are attached to a node without a participant.
- *Connection*: Attaches another compensation structure to the selected node.
- *Participant*: Associates selected participants with that node. Participants must be defined on a compensation structure to receive incentive payout from Sales Incentive Management, regardless of whether that compensation is direct or through rollups.
- *Reference Assoc*: (reference association) Attaches a reference object to the selected node.

Name

For each type, enter a relationship name. Named relationships can be referenced by incentive plan rules, and are displayed in participant reporting. Because a reference to a named relationship references each relationship using

that name, you should create each relationship with a unique name. Don't use spaces or punctuation in the name.

Role	Select a role. Roles are maintained using the Roles page. Access rights are populated based on the role defaults. A role specifies default access rights (Can View Others on Same Node and Can View Children Nodes), but you can override these if required.
Plan ID	Select a configuration plan or incentive plan, depending on the relationship type.
View Plan	Click this link to access the Update Plan component, where you can maintain plan details.
Can View Others on Same Node	Select to enable the participant to view others on the same node.
Can View Children Nodes	Select to enable the participant to view participants on child nodes.
Business Unit	Select the business unit for the compensation structure to attached to the selected node.
Comp Structure (compensation structure)	Select the compensation structure to attach to the selected node.
Participants	<p>Select the participants to associate with this node.</p> <p>Select either <i>Group</i> or <i>Individual</i>.</p> <p>Select <i>Exclude</i> to exclude this participant type from the plan relationship.</p> <p>Select a type for the group or individual. For example, if you selected <i>Individual</i>, select <i>Sales Person</i> as the type.</p> <p>Select a participant ID. Use the Sales Participants page.</p>
User Interactive Objects	<p>Select a type for the group or individual. If you select <i>Group</i> enter the group ID in the UIO ID field. If you select <i>Individual</i>, specify the type of UIO, and then specify the ID of the UIO itself.</p> <p>Values are: <i>Page</i>: Associate a page to this node for the selected participants.</p> <p><i>Report</i>: Associate a report to this node for the selected participants.</p> <p>Select an ID for the UIO type that you selected. UIOs are maintained using the various user interaction object system pages.</p>
Reference Objects	<p>Select either <i>Individual</i> or <i>Group</i> from the Select field.</p> <p>Select <i>Exclude</i> to exclude this reference type from being attached to the selected node. Note that the exclude functionality for numeric ranges only works when you have a numeric range in a group. You cannot exclude a sub-range from a larger range.</p> <p>Select a type of reference object to attach to the selected node. For example, if you selected <i>Individual</i>, select <i>Channel</i> as the type. Reference objects are maintained using the various reference object-related system pages.</p> <p>Select a reference ID for the type of reference object that you selected.</p>

Cloning a Compensation Structure

To clone a compensation structure, use the Clone Compensation Structure component (EI_CSTR_CLONE).

This section provides an overview of cloning and saving as, and discusses how to:

- Clone a compensation structure using the clone feature.
- Clone a compensation structure using the Save As command.

Understanding Cloning and Save As

There are two ways to clone compensation structures:

- Cloning.

Clone existing structures by using the Clone Compensation Structure page. Save the cloned structure using a different tree name than the source structure. The business unit of the new compensation structure is the same as the source structure, but you can change the product category, market template, language, and so forth. Cloning a structure creates contexts for any participants associated with that structure enabling these participants to be run immediately in the EIM engines. Clone a structure to use a source structure as a starting point, but want to change the new structure by, for example, using a different product category and so forth.

- Save As.

Save an existing structure by using the Maintain Compensation Structure page. Use the Save As command when you want to use the same compensation structure and rearrange, add, or delete nodes without changing your original effective-dated compensation structure.

Pages Used to Clone a Compensation Structure

Page Name	Object Name	Navigation	Usage
Clone Compensation Structure	EI_COMPSTRUCT_CLNE	Compensation, Sales Incentives, Define Sales Org Structure, Clone Compensation Structure, Clone Compensation Structure	Clone an existing compensation structure.
Save as of a New Effective Date	EI_COMPSTRUCT_SVAS	Compensation, Sales Incentives, Define Sales Org Structure, Maintain Comp Structure, Maintain Compensation Structure Click the Save As link.	Select a new effective date for the compensation structure copy.

Cloning a Compensation Structure Using the Clone Feature

Access the Clone Compensation Structure page.

Clone Compensation Structure

Step 1: Select the existing Compensation Structure that you wish to clone.

Existing Tree Attributes

*Business Unit

*Tree Name

*Effective Date

Step 2: Specify the attributes of the new Compensation Structure that you are creating.

New Tree Attributes

Business Unit

*New Comp Structure

*Effective Date

*Status

*Description

Product Category

Market Template

Calendar ID

Language Code

Comp Structure State

Default Comp Administrator

☒ Use for Security Groups

Clone Compensation Structure page

Use the Clone Compensation Structure page to clone an existing compensation structure.

Cloning a structure creates contexts for any participants associated with that structure enabling these participants to be run immediately in the EIM engines. Clone a structure if you want to use the business unit and effective date of the source structure as a starting point, but want to change the new structure by, for example, using a different product category, calendar, or language code.

Existing Tree Attributes

Select the business unit of the existing compensation structure and then select the existing structure. The business unit for the cloned structure must be that of the source structure. The system automatically enters the effective date and business unit if only one value exists; if there are multiple values, use the prompt to select the values.

New Tree Attributes

Enter the new compensation structure name. Save the cloned structure using a different name than the source structure.

Select the attributes for the new compensation structure.

Saving a Compensation Structure Using the Save As Command

Access the Save as of a New Effective Date page and enter a new effective date.

Viewing Compensation Structure Summaries

To view compensation structure summaries, use the Compensation Structure Summary component (EI_CSTR_SEARCH).

This section discusses how to view a summary of your compensation structures.

Page Used to View Compensation Structure Summaries

Page Name	Object Name	Navigation	Usage
Compensation Structure Summary	EI_CSTR_SEARCH	Compensation, Sales Incentives, Define Sales Org Structure, Compensation Structure Summary, Compensation Structure Summary	View hierarchy of compensation structures and select a compensation structure to view or update.

Viewing Compensation Structure Summaries

Access the Compensation Structure Summary page.

Compensation Structure Summary page

You can view compensation structure summaries for all structures defined in the system and the relationships between the structures. You can select the compensation structures that are associated with the business units to which you have access.

Select a Value from a Territory Tree

The current system date is the default as of date. All compensation structures are valid for your user ID as of the system date that is displayed. You can also view valid compensation structures for your user ID for a past date. For example, suppose that you have a compensation structure named *New York* that is attached to a node that you administered from January 1, 2001 to June 30, 2001. Specifying any date between those date parameters causes the system to display the *New York* compensation structure.

Select the Summary View option to view only the compensation structures in their hierarchy. Select the Detail View option to view the structure and the nodes that contain the connection relationships.

To expand a compensation structure to view the summary details or to edit it, select the object, and then click the Select button.

Summary

The Summary group box for the selected compensation structure enables you to change the language code and compensation structure state.

CHAPTER 14

Understanding Plans and Plan Templates

This chapter discusses:

- Plan templates.
- Plans.
- Inheritance.
- Plan overrides.
- Plans and compensation structures.
- Plan and plan template definitions.
- Plan templates and calendars.
- Transaction allocation.
- Variables.
- Steps.
- Sections.
- Incentive plan rules.

Plan Templates

Sales Incentive Management uses plan templates as the basis for constructing plans. Plan templates determine the calendar and frequency that are inherited by the plans generated from the template. Plan templates also define common attributes that can be used by all plans generated from the template, such as transaction allocation rules, variables, and sections.

Plan templates map the steps in your business process. For example, your incentive calculate business process may consist of the allocation of transactions to eligible participants, crediting a portion or the full transaction amount to these participants. In this case, your plan template might contain corresponding steps such as ALLOCATE, CREDIT, ROLLUP, CALC, REPORT, and PAYOUT.

Plan templates are not associated with a compensation structure.

A system data flag on plan templates (and plans) reveals whether the plan template is PeopleSoft-delivered or user-defined. PeopleSoft-delivered plan templates can be changed during an upgrade; user-defined plan templates are bypassed during the upgrade process.

See Also

[Chapter 7, “Setting Up Engine Processing,” page 151](#)

Plans

Plans can only be created from plan templates and control how Sales Incentive Management calculates sales incentives for plan participants. In addition to the attributes inherited by the plan, additional transaction allocation rules, variables, and sections can be added to a plan. The system uses two types of plans:

- Configuration plans.

Configuration plans store general transaction allocation rules that affect all participants on the configuration plan node and below and variables that might be shared by some of the participants on that node and below.

Variables in configuration plans serve a unique purpose that is different than variables in plan templates and incentive plans. Unlike incentive plan variables, which are private to each participant, variables in configuration plans can be shared between many participants. For example, if two participants inherit a variable from a plan template and both participants add 10 to the variables, each participant sees a value of 10 because they each have their own private instance of the variable. If, however, the variable is defined in a configuration plan and each participant adds 10 to this single shared instance, both participants see the value of 20 because the value is related to a configuration relationship. Configuration plans are associated with nodes through a configuration relationship.

- Incentive plans.

Incentive plans direct the engine on how to calculate sales incentives or perform other tasks. Incentive plans are not confined to just processing transactions; for example, you could define a plan to multiply all employee base salaries by 5% and provide the result as a payout. You can modify your plans to reflect changes to your organization's compensation policy. Incentive plans are associated with compensation structure nodes through a participant relationship. Variables defined in incentive plans (or templates) lead to a separate instance for each participant using the plan.

You can clone plans to make copies of existing plans easily, and then modify them according to your needs.

See Also

[Chapter 2, "Understanding Sales Incentive Management," SIM Engine Architecture, page 19](#)

Inheritance

Inheritance is the mechanism that allows plans to take on the attributes of the template from which they were generated. Sales Incentive Management uses two types of inheritance:

- Creation inheritance.

Similar to Save As functionality. The variable or section is defined in the template and then copied to the plan when the plan is created. From that point forward, the plan has its particular version of the variable or section. With unlinked variables or sections, the plan template provides a starting set of plan data that is automatically copied to the plan. You can modify unlinked variables and sections within the plan, but other plans generated from the template are unaffected by these changes because they have their own private copies. You can also share sections to a section library by copying them to the library or referencing them.

- Real-time inheritance.

The variable or section is defined in the template and remains the property of the template. Linked variables and sections are inherited by plans but cannot be changed in the plan; you must modify the template itself. Changes to linked sections and variables in the template carry forward to all plans created from the template.

Sections that are part of the section library through referencing also use real-time inheritance. A referenced library section remains the property of the section library.

The following are the effective date implications of inheritance:

- For each effective date in the plan template, there is a corresponding effective date in the plans that are created from the template (for all effective dates later than the plan creation date).
- Plans can also have additional effective dates between and after the plan template effective dates.
- Library sections themselves have an effective date independent of plans and plan template effective dates.

Plan Overrides

You can create an exception for a specific participant in a plan by creating an override. An override changes a plan for only one plan context.

See [Chapter 2, “Understanding Sales Incentive Management,” SIM Engine Architecture, page 19](#).

Overrides enable you to change constants, transaction allocation rules, or incentive plan rules for a participant on a specific plan. You might create an override to set a different quota for a salesperson in a sales group.

Overrides enable you to customize a plan for individuals that use it. This saves you the effort from creating a specific plan for each participant. Overrides apply only to a specific context. When dealing with an incentive plan, the context specifies a participant using a specific plan attached to a specific node. If the plan is a configuration plan, the context merely specifies a configuration plan attached to a specific node. The context is crucial to identifying what overrides apply.

You can create overrides for:

- Configuration plans and incentive plans, but not for templates.
- Transaction allocation rules.

You can change the definition of a transaction allocation rule and activate (or inactivate) the rule, but cannot add or delete a rule. You cannot change the transaction type of a transaction allocation rule or delete transaction types.

- Variables.

You can override the value of constants. You can override linked variables, but cannot change the variable name or type, or add or delete variables.

- Incentive plan rules.

You can override an incentive plan rule definition, activate (or inactivate) a rule, change the rule label (variable name), add, or delete rules.

See Also

[Chapter 16, “Defining Plans,” Working with Plan Overrides, page 351](#)

Plans and Compensation Structures

For configuration plans, the plan context relates plans and nodes. For incentive plans, the plan context relates, plans, nodes, and participants together. For incentive plans, you associate plans with nodes on a compensation structure by using a participant relationship to attach one or more participants to a territory (node). When you establish this relationship on the compensation structure, you are defining the incentive calculation process for the participants in this territory. In Sales Incentive Management, your compensation structure usually represents a sales organization, with lower levels representing different territories within that organization.

A single node on the compensation structure can be associated with several plans, but each plan must be associated to that node through a single relationship; hence, a single node can have multiple relationships. For example, consider a node that represents a single sales office. There might be relationships for people in the office who sell product A. These relationships include the product A plan and all the people who sell product A. There might be a relationship for people in the office who sell product B, which includes the product B plan and all the people who sell product B. There could also be a relationship for a sales manager, which associates the sales manager plan to the person occupying the sales manager role. In addition, a single person could participate in more than one relationship. For example, if the sales manager sells products A and B, he or she is associated to all three plans: in two plans as a salesperson, and in the third as a sales manager.

During processing, the system uses participant and configuration plan relationship types that are defined on the compensation structure for allocation, and also uses participant relationships that are defined on the compensation structure (using roles) for rollups. The compensation structure makes it possible for the system to match transactions to the appropriate participants on the structure so that the payouts are calculated correctly.

See Also

[Chapter 13, “Working with Compensation Structures,” page 289](#)

[Chapter 2, “Understanding Sales Incentive Management,” SIM Engine Architecture, page 19](#)

Plan and Plan Template Definitions

Plan and plan template definitions have an identical structure and include:

- General plan information.
- Plan calendar and frequency information to control the plan life cycle.
- Transaction allocation rules used to allocate transactions to the appropriate participants.
- Variable definitions to hold values that persist across processing runs.
- Steps to contain sections and incentive plan rules to control transaction processing.

Plan Templates and Calendars

Each plan template defined in Sales Incentive Management uses a calendar and frequency.

The system uses calendars to:

- Define the life cycle of plans, plan calculations, and variables by establishing the period over which the plan runs.
- Schedule payouts.

Calendars divide a fiscal year into a series of contiguous time periods called based periods. Calendars support this division at various levels of granularity known as frequencies. The subdivision of the year into base periods corresponds to the base frequency. For instance, if a plan's base frequency is daily, then a calendar could also have a monthly frequency that divides the year into periods of one month, and a weekly frequency that divides the year into weeks. Calendars do not have to be divided into periods of equal durations; the periods can be of any length as long as they begin or end at the same time as base periods. For instance a "special" frequency could divide the year into a six-month period followed by six one-month periods.

Calendars are associated with plan templates. Plans inherit the calendar associated with the template.

Transaction Allocation

Transaction allocation is the process of assigning a transaction to its "owner"; that is, the participant whose plan should take the transactions as input and process them, possibly assigning them to additional participants (via rollup or splits).

Because participants may be associated with multiple territories and plans, transaction allocation should identify the specific territory (tree name and tree node) and plan for each transaction to avoid allocating the same transaction multiple times to the same participant. To achieve this, the system uses transaction allocation rules. Allocation rules can reference items that are associated with compensation structure nodes. In this way, the compensation structure's participant and configuration plan relationships help to assign the transactions properly.

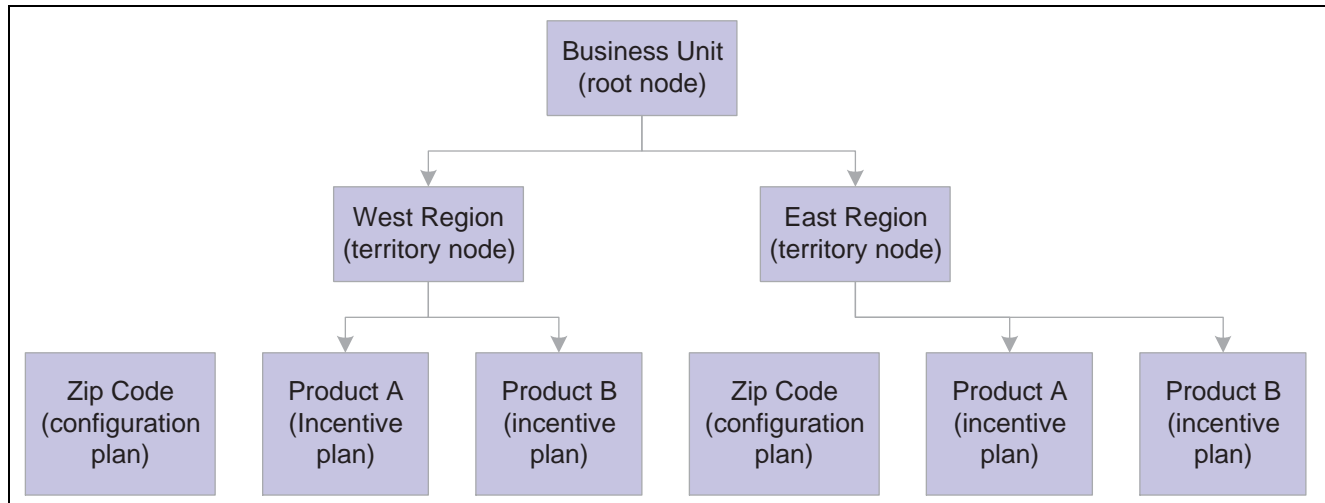
A transaction allocation rule processes only one type of transaction, an order, for example. Allocation rules use the same syntax as incentive plan rules.

Incentive plans and configuration plans both use transaction allocation rules. Thus, you can assign transaction allocation rules at various levels of the compensation structure. The lower nodes inherit the transaction allocation rules from the nodes above. The filters should be more specific as you move down the compensation structure.

For example, if a compensation structure is based on territories, a ship-to location zip code on a transaction can be referenced in transaction allocation rules to allocate the order to the appropriate territory.

To make transaction allocation easier to understand and explain why allocation is necessary, consider the following example.

A company has organized its compensation structure by regions and products, separating product A from product B in each region. The company uses one set of rules to calculate the commission on product A and another to calculate the commission on product B. The rules for calculating the commission on product A are stored in plan A and attached to the product A nodes, along with the participants who sell product A. The same arrangement is defined for product B. The structure looks like this:



Allocation rule example

What happens if a salesperson sells both products and is therefore attached to both nodes? How does the system know which plan to use when processing the salesperson's sales?

The transaction allocation rules control which plan processes the transaction by identifying the context. Plans can be attached to multiple nodes in the compensation hierarchy, with each plan's transaction allocation rules further qualifying the transaction set, each level of rules combining the current transaction allocation rule and the transaction allocation rule on higher nodes.

For example, assume that the product node is the lowest node on the tree, and the next level up is sales region (East and West in this example). The user can attach a configuration plan to each sales region node to filter out transactions belonging to other regions, and the transaction allocation rule would define this condition: "Where the region on the transaction matches the region of this node." If there are two regions, East and West, the tree would look like this the above example.

Assume our salesperson is assigned to all four lowest-level (product) nodes. As the salesperson sells products, the transaction allocation rules route transactions to the correct node and, therefore, the correct plan. If our salesperson sells product B in New York, the transaction allocation rules on the plan assigned to the region node routes the transaction down the east region branch, not the west region branch. The transaction allocation rules on the plan assigned to the product nodes routes the transaction to the product B node under the eastern region, not to the product A node.

You can create a different transaction allocation rule for each transaction type or, instead, create a generic filter with no associated transaction type that applies to all transaction types.

Variables

This section discusses:

- Variables.
- Variable types.
- Accesses.
- Performance measure variable grouping.

Variables

Sales Incentive Management uses variables to store incentive data, which can be shared by participants on one or more nodes. Variables can be updated during processing to hold intermediate results of incentive calculations. This data can then be used as input for other incentive calculations during the same processing run or a later runs of the same plan or other plans. Data in variables serve as the basis for reporting and can help debug plan logic during plan definition. You can update variables for an individual participant on an incentive plan or a participant can contribute to a shared variable on a configuration plan, such as a regional variable.

Variables are defined in both configuration plans and incentive plans, but they are used only in incentive plans. You can either add a new variable to a plan or reference an existing variable that is defined in a configuration plan. A variable can be referenced if it has its visible attribute set and if the position of its configuration plan relative to the processing incentive plan meets the following criterion. The configuration is the first instance that is reached when walking up the compensation structure starting from the node where the incentive plan is attached. You can only reference variables defined in configuration plans. Variables defined in a configuration plan truly are *shared* variables that can belong to many participants associated to many different plans as long as those plans reference the variable and the relative positions of these plan meet the criterion above.

A variable can be either linked or unlinked depending on how you want the system to handle modifications. Linked variables can be defined or modified only in a plan template, but otherwise, they act just like ordinary variables. All plans created from the template inherit the variable from the template when the variable is identified as linked. In plans, linked variables appear above plan variables with a read-only definition. Changes to linked variables propagate to all occurrences of the reference to that variable in incentive plans.

Unlinked variables are copied to a plan at the time the plan is created and are part of the plan as if they had been manually created in it. Any subsequent changes to the variable in the template do not affect the existing plans, but plans created after the change reflect modifications in the template. You can modify unlinked variables in plans, but the changes only impact that plan.

Variables are generally associated to a frequency. This is true of all single-valued variables: string, date, boolean, number. The frequency affects the life cycle of the variable. A variable with a monthly frequency will be re-initialized every month. To accumulate changes in a variable throughout the year, you need a variable with an annual frequency. Aggregators do not have any frequency, but their accesses do. It is therefore possible to calculate aggregator statistics related to various frequencies, for instance annual sum or quarterly minimum. Compound numbers can have multiple frequencies. They act as multi-dimensional arrays with indices that are frequencies and periods.

Variables can be accessed and updated through formulas. Single-value variables can be used directly in rules without formulae. Multi-value variables can also be accessed through an *access*. Incentive rules can use formulas to evaluate or update a variable and can pass a variable to a formula as one of the formula's parameters.

Variable Types

The functional type of a variable controls its behavior, dictates how it is used in incentive plan rules, and determines what kind of data the variable can hold. Variables are either single-value or multi-value. Variables are further classified as either mutable or constant. Only immutable variables can have an initial value. Constants are immutable—their value always remains the initial value. Sales Incentive Management includes these variable types:

Aggregator

A multi-value variable that is a collection of entries without frequency used to calculate statistics such as the totals or average sale amounts of transactions. Each value that is added to the aggregator becomes a separate detail line item with the amount, date and other relevant information.

See [Chapter 12, “Understanding Rule Syntax,” Aggregators, page 283.](#)

Attainment	A type of aggregator that accumulates the value that an individual has achieved in relation to a quota.
Boolean	A single-value variable used to determine if a variable is one of two possible values: true or false. For example, a plan that uses a performance rating to assign bonus amounts. A participant receives a 93% performance rating and the bonus pays for all ratings 90% and higher. The variable returns a value of true and the participant receives the bonus.
Compound Number	A multi-value variable that supports multiple frequencies, with multiple periods. You can set separate values for each period and for each frequency for a year or more.
Date	A single-value variable that is a date.
Number	A single-value variable that is a number.
Quota	A variable that acts exactly like a compound number. Use it to define the goals for different periods within frequencies for participants. You can assign a different initial value for each frequency, as well as define multiple periods within each frequency. If you make a change to one frequency, the system can convert that change to the other frequencies and periods in the goal. So, if a goal changes for one month, the system can alter the quarterly and annual frequencies to reflect that change. Use accesses or formulas to get values from quotas.
String	A single-value variable that is a string.

Variables can be further classified as immutable (constants) or mutable (variables). Boolean, compound number, date, number, quota, and string variable types can be defined as constants. The variable definition for a constant is effective-dated. Constants have initial values and overrides but cannot be modified directly through plan rules. To change the initial value, insert a new effective-dated row for the variable definition. Every time the engine processes a constant it uses the initial value as of the current date. You can also use overrides with constants, but you cannot set up a constant to be updated by a plan rule. Variables, in contrast, do not have a preset initial value but can be changed through plan rules.

See Also

[Chapter 12, “Understanding Rule Syntax,” Aggregators, page 283](#)

Accesses

Accesses are stored as a collection within an accessor, similar to how records are stored as a collection within a view. Accesses call values from aggregator or compound number variables. Each access definition tells the system how to get values out of the aggregator or compound number. The access definition specifies the frequency, method of access (sum, average, minimum, or maximum), and an offset measured in periods.

You can define a multiple accesses within a single accessor to retrieve different information from the same aggregator, giving each access a different name. For example, to calculate monthly sales, define an accessor called `Total_Sales_Accessor` and within that accessor, define the access definition, `Monthly Sales`, to instruct the system to sum the transaction amounts for the current month. During processing, the access definition calls the needed data (sales amounts and dates) from the aggregator. To calculate quarterly sales, define an access definition, `Quarterly Sales` (within the same accessor), to tell the system to sum the transaction amounts for the current quarter.

Formulas can perform the same function as accesses, but if a customer uses a certain aggregator often, accesses are more efficient. The system can cache accesses and only has to generate them once, whereas the system has to generate formula results every time. Also values calculated with formulas cannot be reported unless they are assigned to another reportable variable. So, if the value must be reported, use an access, not a formula.

See Also

Chapter 12, “Understanding Rule Syntax,” Accesses, page 283

Performance Measure Variable Grouping

Performance measures act as a grouping mechanism that relates variables together (for example, quota and attainment). Variables are attached to a performance measure in the plan definition. This enables you to assign a variable to multiple performance measures. Performance measures also contain information relevant to reporting. They define the relationships between variables within the performance measure umbrella.

Before you can group variables together on the Template Definition or Plan Definition pages, define performance measures using the Performance Measure page.

Each variable in the performance measure is assigned a label. These labels become column headings in the reporting pages. Each performance measure is divided into sections such as quarterly totals and annual totals. The description of each section becomes the row label in the reporting pages. Within each section, the system generates one row for each variable label. The rows are ordered according to the order in the variable labels area. For each row, specify a variable name. The value of the variable becomes a cell in a grid on the reporting pages. Customers can enter any type of variable for single-value variables. For multi-value variables, use access names.

For example, you can associate three quota accesses (one monthly, one annual, and one quarterly) to the performance measures. You also define accesses to the attainment that calculates the monthly, quarterly, and annual sums. This makes it possible for the participants to view their progress toward the quotas on the My Sales Compensation page.

Steps

Steps are defined in plan templates and contain sections. Steps in plan templates don't perform actual processing; instead, they determine the steps that appear in plans. Plan templates may contain special steps that are only visible in the plan template that are responsible for system-related tasks, such as initializing variables.

Plan template steps correspond to the steps defined in an enterprise incentive management job definition.

Because template steps are inherited in real time by plans, you can add, edit, or delete steps in plan templates, but not in plans. Steps can be reordered in a plan template but not in a plan.

A step can contain as many sections as required, and you can define as many steps as required.

After defining the plan template steps, you can have the system validate them to ensure that the incentive plan rule content—such as referenced variables and formula syntax, for example—is valid.

Sections

A section is a sequence of incentive plan rules. The system executes the incentive plan rules in the order that they appear in the section definition. Sections make it possible for plans to divide processing into logical events, thus, providing greater control over transaction processing. Sections are parts of a step and are processed sequentially.

Sections play a role in processing control through the following three filters, which are based on transaction attributes:

- Transaction type.

A section a single type of transaction to process (for example, order, shipment, rollup, credit, invoice, or payment).

- Transaction performance measure.

A section can process transactions that are associated with a specific performance measure. For example, a section associated with the performance measure NEW_ACCTS might only process transactions related to the acquisition of new accounts.

- Transaction state.

A transaction state is a number assigned by a plan rule to a transaction. Only transactions matching the state specified by a section can be processed in that section. By being promoted to a new state, in a rule, transactions become eligible for processing in subsequent sections where they meet the filter criteria, in the same or other steps of the plan. The new state plays a significant role in determining which section will be the next to process the transaction.

The ability to skip a section gives you greater control over how transactions are processed. For example, you might decide to process order transactions but exclude rollup and credit sections until you have reviewed the interim results. Then you can run the rollup and payment sections in a separate run.

The product category and market template assigned to a plan template control the type of transaction, transaction state, and performance measure that you can select for a section.

The values that you select for the product category and market template of the plan determine the available values within the plan for the transaction, transaction state, and performance measure.

Sections can be either linked or shared:

- Linked sections.

Linked sections are defined only in plan templates. Changes to linked sections affect all plans that reference that section. Linked sections often contain common code that changes frequently and needs to be shared among several plans. From the template, you can delete or unlink a linked section. Plans can only reference sections defined in their template.

- Shared sections.

Shared sections are stored in a section library so that they can be used by other plans. Though shared sections belong to the section library, they are edited in plans. Changing a library section in one plan affects all other plans that use it and is subject to effective-dating rules as of the date of the modification. For example, previous instances of that section do not reflect those modifications. Unlike linked sections, which are only accessible to plans based on the template where they are defined, shared sections are accessible to all plans. You might use a shared section to perform processing that is widely used (a credit section, for example) and won't change significantly but that may use a different template.

Templates can define any combination of linked or shared sections.

You can reference a section from the library in any template; the same section is shared by all the template that reference it. Changing the section in any template that references it impacts all the other templates that reference it.

You can also copy a section from the library. The copy is not shared but belongs to the template where it was copied. Changes to the copy does not impact any other templates nor the source in the library.

Sections that are not linked or shared are copied to plans at creation time. Subsequent changes to the source section are not reflected in the plans where the section was previously copied. Conversely, changes to a plan copy does not impact the source section nor other copies of that section in other plans.

When designing a plan, ask the following questions to determine what type of sections to use:

- Does the section contain general rules that apply widely across the sales organization? Or does it contain specific rules that apply to only a few participants?

If the section has specific rules, define the section in a plan, not a template. If the section has general rules that are applicable across several plans, define the section in a template. If the section is common across multiple templates, define it as a library section and copy it into these templates. If the section is common across the entire sales organization, share it by referencing it throughout the section library.

- How often will the section change? Will these change be specific or apply to a broad range of participant?

If the section changes frequently and the changes apply to several plans, define the section as linked in a template or a section library depending on how broad the reach of these rules is. If the section requires customization for each plan, define it in the template but copy it to the plan. If the section is specific to a single plan and is not expected to be used by any other plan, define it directly in the plan.

Incentive Plan Rules

Incentive rules prescribe actions to be taken at processing time. Most rules affect transactions or variables. However, rules can be used to modify, or even create, any other object in the system. Each section contain zero or more rules, which are executed sequentially. Each rule can include logic or formulas operating on set values or variables that reference objects in the system, such as variables, object and transaction attributes, as well as commission and lookup tables.

Incentive rules can:

- Update variables attached to a plan and generate new transactions.
The generated transactions can be for the same plan and participant or for a different plan and/or participant and node.
- Take the value of a variable and use it in a calculation.
- Access fields in transactions directly, as well as attributes of other objects.
- Generate entries to the payout table (for immediate payout or to be held), or generate and initiate other types of Sales Incentive Management transactions.
- Release held transactions from the payout table.
- Move payouts from the payout table to the participant ledger table (EI_LEDGER_TBL).

An incentive plan rule consists of a rule label and a rule. The rule label holds the results of the evaluated incentive plan rule.

See [Chapter 12, “Understanding Rule Syntax,” Rule Types, page 269](#).

Formulas can perform simple math, be a reference (to variables, other cells, and transaction fields), run simple commands (SUM, IF, MAX, MIN), or perform tasks, such as table lookups. You can find a list of available formulas in the formula catalog.

You can reference the contents of a rule by using the rule label in another rule. If you use a rule with the same name as a variable, the rule updates the variable.

When you create a rule, the system does not validate it to make sure that it is syntactically correct. You must hit the validate button to check that a rule is valid before saving the plan. If the system determines that there is a syntax error or that, for example, a referenced variable used in a rule does not exist or that the data type of the referenced variable is inconsistent with the rule type, it displays an error message. If you inactivate a rule, the system does not process it. When developing a plan, you can use that option to inactivate invalid rules that are still under development.

CHAPTER 15

Defining Plan Templates

This chapter discusses how to:

- Define variable values tables.
- Define a plan template.
- Clone a plan template.
- Update a plan template.
- View plan template history.
- Define your page setup.

Defining Variable Values Tables

To define variable values tables, use the Maintain Variable Values component (EI_VAR_VALUE_DFN).

This section provides an overview of values tables and discusses how to define variable value descriptions.

Understanding Values Tables

Use values tables to point variables to a table of numeric values and their textual descriptions when the amount is a nonnumeric measure. Values tables hold the valid values and a textual description of what each numeric value represents. The system uses the table to limit the variable values to only the valid values held in the table, and to convert the numeric value to a textual value. For example, a variable that represents a performance rating might have the following numeric values and textual descriptions:

Numeric Value	Textual Description
5	Company Maker
4	Exceeds Expectations
3	Meets Expectations
2	Needs Improvement
1	Under Perform

Page Used to Define Variable Values Tables

Page Name	Object Name	Navigation	Usage
Variable Values Descriptions	EI_VAR_VALUE_DFN	Compensation, Sales Incentives, Define Plans, Maintain Variable Values, Variable Values Descriptions	Create value tables that define variable values. You use these tables when defining variables for plan templates and plans.

Defining Variable Values Descriptions

Access the Variable Values Descriptions page.

Variable Values Descriptions

Values Table PERF RATING

Values Table

***Description** Performance Rating

Long Description Performance Rating

Value Definitions Customize Find View All First 1-5 of 5 Last

	*Value	*Description		
1	5	Company Maker	+	-
2	4	Exceeds Expectations	+	-
3	3	Meets Expectations	+	-
4	2	Needs Improvement	+	-
5	1	Under Perform	+	-

Variable Values Descriptions page

Enter the valid values for a variable and the descriptions of these values for the values table. When you define variable properties for plan templates and plans, you can limit the variable values to just the valid values in the selected table.

Defining a Plan Template

To define plan templates, uses the Create Template (EI_ADD_TEMPLATE) and Update Template (EI_PLAN_DEFINITION) components.

This section discusses how to:

- Define plan template general and calendar information.
- Define transaction allocation.

- Define performance measure variable groupings.
- Define variables.
- Define aggregator and attainment variables.
- Define compound number and quota variables.
- Define Boolean, date, number, and string variables.
- Define accesses.
- Copy variable definitions.
- Reference variables.
- Define steps, sections, and incentive plan rules.

Pages Used to Define a Plan Template

Page Name	Object Name	Navigation	Usage
Add a New Template	EI_PLAN_ADD_TEMPL	Compensation, Sales Incentives, Define Plans, Create Template, Add a New Template	Enter a set ID and template ID, and then select the effective date, product category, and market template.
Template Definition	EI_TMPL_DEF_W	Compensation, Sales Incentives, Define Plans, Create Template, Add a New Template, Template Definition	Assign an calendar to and define transaction allocation rules and performance measure groupings for a new plan template.
Template Definition 2	EI_TMPL_DEF_W_2	Compensation, Sales Incentives, Define Plans, Create Template, Template Definition 2	Define the variables, steps, sections, and incentive plan rules for a new plan template.
Aggregator Properties, , Number Properties, , Attainment Properties, , Boolean Properties, , String Properties, , Date Properties	EI_VAR_PROP_SEC	Click the Variable or Constant link on the Template Definition page and select the variable type. Click the Copy or Reference link on the Template Definition page and select the Variable Name of the variable that you want to copy or reference.	Define the properties of a new variable or name a referenced or copied variable.
Quota Properties, , Compound Number Properties	EI_VAR_CN_SEC	Click the Variable or Constant link on the Template Definition page and select the variable type. Click the Copy or Reference link on the Template Definition page and select the Variable Name of the variable that you want to copy or reference.	Define the properties of a new variable or name a referenced or copied variable.

Page Name	Object Name	Navigation	Usage
Accessor Properties	EI_VAR_ACC_SEC	Click the Accessor link on the Template Definition page.	Define accesses definitions to access aggregator and compound number variables. Accessors enable you to define accesses with specific frequencies and accumulations for use in plan rules and reporting.
Copy Variable	EI_COPY_VAR	Click the Copy link on the Template Definition page.	Select the variable name of the variable that you want to copy.
Reference Variables	EI_SELECT_VAR	Click the Reference link on the Template Definition page.	Select the variable name of the variable that you want to reference.
Order Allocations,, Order Sections,, Order Performance Measures,, Order Variables,, Order Steps,, Order Rules	EI_PLAN_ORDER	Click the Order Allocations, Order Sections, Order Performance Measures, Order Variables, Order Steps, or Order Rules link on the Template Definition or Template Definition 2 page.	View and change the order of allocations, variables, steps, or rules.
Share Section to Library	EI_SHARE_SECTION	Click the Share Section button on the Template Definition 2 page.	Share a section to the library by copying or referencing.
Library Sections	EI_SELECT_SEC	Click the Library link on the Template Definition 2 page.	Select a section from the library to add to the plan template.

See Also

[Chapter 16, “Defining Plans,” page 345](#)

Defining Plan Template General and Calendar Information

Access the Template Definition page.

The screenshot shows the 'Template Definition' page with tabs for 'Template Definition', 'Template Definition 2', 'History', and 'Page Setup'. The page includes a header with 'SetID SHARE', '*Template ID PSR-IP-T', a 'New Search' link, 'As Of 09/21/2004', and a 'Go To This Date' field with a calendar icon and a 'Go' button. The main content is divided into two sections: 'General Template Information' and 'Calendar Information'. The 'General Template Information' section includes fields for 'Effective Date' (01/01/2001), '*Template Name' (Product Sales Rep), '*Description' (Product Sales Rep), 'Long Description' (This plan is for employees who are Product Field Sales Reps, for all Territories in any Region, within the Country USA.), a checked 'System Data' checkbox, 'Product Category' (Sales Incentive Management), 'Market Template' (High Tech & Industrial), 'Generates Plan Type' (Incentive Plan), 'Last Update User ID' (SVP1), and 'Last Update Date/Time' (09/09/04 5:42:04AM). The 'Calendar Information' section includes '*Calendar ID' (00), '*Frequency ID' (Monthly), and 'Long Description' (This calendar is for Sales Incentive Management, HT&I template.). A 'View Calendar Definition' link is at the bottom.

Template Definition page (1 of 3)

Use the Template Definition page to create a new plan template. Select a product category and market template for the template to determine the type of components (sections, steps, and so on) that can be added to the template. Every plan template is associated with a product category and market template.

General Template Information

Template Name	Enter the name of the template that you are creating.
Generates Plan Type	Indicate the plan type that you intend to create using this template. Select either <i>Configuration Plan</i> or <i>Incentive Plan</i> . After you save the new template, this field is no longer editable.

Calendar Information

Calendar ID	Enter the calendar that you intend to use for the plans generated from this template. Calendars are defined on the Calendar Detail page.
Frequency ID	Enter the frequency that you intend to use for the plans generated from this template. The available frequencies are determined by the calendar ID. You can assign different frequencies to variables in the plans generated from the template as long as the frequencies are available in the template calendar. If you do not specify a frequency for the plan template, the system uses the frequency associated with the plan.
View Calendar Definition	Click this link to view the calendar definition that you created.

Defining Transaction Allocation

Access the Template Definition page.

Transaction Allocation

*Transaction TypeRawOrderTransactionDescription






☐ Enable Tracing

Long Description

Allocates orders (ORD), shipments (SHP) and adjustments (ADJ) where the Product ID (PROD_EIM_KEY) matches the PRODUCTS reference object group attached to the Comp Structure node (territory).

*Rule

AND(RawOrderTransaction.PROD_EIM_KEY ISIN Product["PRODUCTS"].EIM_KEY,OR(RawOrderTransaction.TRANSACTION_TYPE ="ORD",RawOrderTransaction.TRANSACTION_TYPE = "SHP",RawOrderTransaction.TRANSACTION_TYPE = "ADJ"))



[Order Allocations](#)[Validate Allocations](#)






Template Definition page (2 of 3)

Transaction Allocation

You can define general transaction allocation rules in your plan templates as a starting point for defining your plans, and then refine the rules in your plans.

The transaction allocation rules that you define in your templates are copied to plans at the time of creation. If you make subsequent changes to the transaction allocation rules in the template, these changes are not carried to the plans that have already been created using the template.

You can define different conditions for transaction allocation rules by creating new rules or selecting existing rules defined in the system. Conditions consist of comparisons between two values. The definitions of the values on each side of the operator follow standard rules syntax. You can use NOT, AND, and OR operators in your transaction allocation rules.

Transaction Type	Select a transaction type for the transaction allocation rule. The available transaction types depend on the market template that you assigned to this plan template.
Enable Tracing	This functionality is currently not in use.
Rule	Construct the rule using the Look Up, Formula Syntax, and Formula Builder buttons.
	(Validate Rule) Click this button to validate the rule syntax.
	(Look Up) Click this button to open the Lookup page. This page displays all of the formulas and objects that you can use in a rule. When you select an item from the list, the system returns you to the Template Definition page.
	(Formula Syntax) Click this button to display the formula syntax as defined in the formula catalog.
	(Formula Builder) Click this button to display the Formula Builder page, where you can enter the formula parameters.
	(Formula Data Setup) Click this button to display a component, where you can create formula data. For example, in the case of a lookup formula, click the Formula Data Setup button to display the component that you can use to define the table.
Order Allocations	Click this link to access the Order Allocations page and change the order of the allocations that you have defined.
Validate Allocations	Click this button to verify the syntax of your rules.

Defining Performance Measure Variable Groupings

Access the Template Definition page.

The screenshot displays the 'Performance Measures' configuration interface. At the top, there are 'Expand All' and 'Collapse All' buttons. Below, a section titled 'NEW_ACCTS - New Accounts' is expanded. It features a dropdown for '*Performance Measure' set to 'NEW_ACCTS - New Accounts'. Underneath is a table for 'Variable Labels' with columns for '*Description' and '*Label Order'. The table contains two rows: 'New Accounts Attainmnt Monthly' with label order 1, and 'New Accounts Payout Monthly' with label order 2. Below this table are 'Order Sections' and 'Apply Labels' buttons. Further down, a 'New Section' section is expanded, showing a table for 'Performance Measure Section Members' with columns for 'Description' and 'Variable Name'. This table contains two rows: 'New Accounts Attainmnt Monthly' with variable name 'NEW_ACCTS_ATTAIN_M', and 'New Accounts Payout Monthly' with variable name 'NEW_ACCTS_PAYOUT_M'. At the bottom left, there is a link 'Order Performance Measures'.

Template Definition page (3 of 3)

Performance Measures

Use performance measures to group variables together for comparison on the participant user interface pages. Each variable in a performance measure is assigned a label. These labels become column headings in the reporting pages. Each performance measure is divided into sections such as quarterly totals and annual totals. The description of each section becomes the row label in the reporting pages. Within each section, the system generates one row for each variable label. The rows are ordered according to the order in the variable labels area. For each row, specify a variable name. The value of the variable becomes a cell in a grid on the reporting pages. You can enter any type of single-value variables and accesses. Aggregators, attainments, compound variables and constants, and quotas can not be directly included in a performance measure. . They can be included through one or more accesses.

You can use the same performance measure, with the same or different variable groupings, in more than one template or plan.

When you are defining your plan templates, you must first set up the Performance Measure section of your plan because the Performance Measure section is driving the design of the plan. At first, leave the variables in the Performance Measure section blank. After you plot out your performance measures that you need for your plan, you'll know what variables and incentive plan rules you need and can define them. Then you can return to the Performance Measures section of the plan template and enter the variables that you've defined.

Note. You should only define the Performance Measures section in a plan template if you include all your plan variables in the plan template. If you plan to define some variables in the plan itself, you should wait and define the Performance Measures section in the plan.

Performance Measure

Select a defined performance measure. Performance measures are defined on the Performance Measure page.

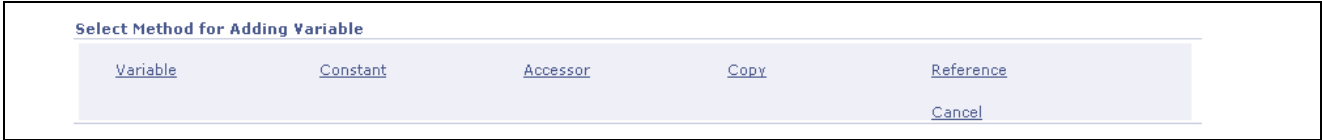
Variable Labels

Enter a label for the variable just as you want it to appear on the reporting pages. You can use the same variable label in multiple section members within the same performance measure.

Label Order	Number the variable labels in the order that you want the column heading to appear on the reporting pages. The system places the headings in ascending numerical order from left to right across the page.
Order Sections	Click this link to change the order of the sections that you define for a performance measure.
Apply Labels	Click this button to sort the section members to match the variable labels section.
Section ID	Enter the name for the section as you want it to appear on the section row header on this page.
Description	Enter the description for the section member as you want it to appear as a row label on the reporting pages.
Performance Measure Section Members	The system generates one row in this grid for each of the variable labels that you define. You cannot add or delete these rows.
Variable Name	Enter the variable that you want to use to provide the data for the reporting pages.

Defining Variables

Access the Template Definition 2 page.



Template Definition 2 page (Select Method for Adding Variable section)

Use the Template Definition 2 page to define the variables that you want to be inherited by all of the plans created from the template. You can create a new variable, constant, or accessor (accesses), or copy or reference one that is already defined in another template that can be used for reference. Variables have no initial value; constants do have initial values. Accesses access other variables.

Sales Incentive Management is delivered with predefined variable types. Define plan variables based on these variable types. Define additional variable types in the Object Catalog.

You can also copy or reference variable definitions that have already been defined. When you copy a variable definition, you can select from any of the variables already defined in the system and the copied variable definition is not connected to the original variable definition in any way. Any changes to the original variable do not affect the copied variable. When you reference a variable, you can only select from those variables that have been defined in a configuration plan with the same compensation structure.

Select Method for Adding Variable	<p>Click the Variable or Constant link to add a new variable. The Select a Variable Type group box appears. Select the appropriate variable type to access the <Variable Type> Properties page.</p> <p>Click the Copy link to view a list of all defined variables and select the variable that you want to copy.</p> <p>Click the Reference link to attach a variable already defined in a configuration plan on the structure. The list of available reference variables appears. Select the variable that you want to reference to access the <Variable Type> Properties page.</p>
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Click the Accessor link to add an accessor. This opens the Accessor Properties page.

Defining Aggregator and Attainment Variables

Access the Aggregator Properties or the Attainment Properties page.

Template Definition

Attainment Properties

Variable Properties

*Variable Name

REGION_PROD_REV_ATTAIN

Variable Type

Attainment

*Description

Region Product Rev Attainment

☒ Linked

☐ Enable Tracing

Unit of Measure

Values Table

☐ Display on Manager Page

* Required Field

OK

Cancel

Attainment Properties page

Variable Name	Enter the name of the new variable. If you are adding a referenced variable, you can keep the name of the referenced variable or give the variable a unique name.
Unit of Measure	Select the unit of measure for the variable.
Values Table	To limit the possible values of the variable to a specific set, select the values table that contains the variable values that you want to use. Define values tables on the Variable Values Descriptions page.
Display on Manager Page	Reserved for future use.
Linked	<p>This option is available in templates only. Select this check box to share this variable the plans based on this template. Any changes made to the variable definition are immediately inherited by a plans derived from this template, subject to effective-dating rules. The Inheritance section of the Understanding Plans and Plan Templates chapter discusses the effective-date implications in detail.</p> <p>See Chapter 14, “Understanding Plans and Plan Templates,” Inheritance, page 308.</p>
Enable Tracing	This functionality is currently not in use.

Note. You cannot edit variable properties once the variable is in use in the plan rules.

Defining Compound Number and Quota Variables

Access the Compound Number Properties page or the Quota Properties page.

Template Definition

Quota Properties

Variable Properties

Variable Name PROD_REV_QUOTA **Variable Type** Quota

***Description** Product Revenue Quota ☒ **Linked** ☐ **Enable Tracing**

Unit of Measure

Values Table

☒ **Display on Manager Page**

Fiscal Year 2004 **GoTo Year**

Frequencies

***Frequency ID** Annual

Periods

Accounting Period	Period Begin Date	Period End Date	Value
1	01/01/2004	12/31/2004	750000

* Required Field

Quota Properties page

The Compound Number Properties and Quota Properties pages are identical to the Aggregator Properties and Attainment Properties pages but include the Frequencies group box. Insert new rows in this group box to add multiple frequencies for the variable.

The following fields are available for constants. Only constants let you set the value in-effect as of a certain date. The Value field displays for Boolean and Number constants so that you can enter a straightforward value for them. The other fields that display for constants relate to constants that have multiple frequency/period buckets, such as compound numbers and quotas.

GoTo Year and Go

You can set values by fiscal year/accounting period based on your frequencies. The Goto Year field enables you to another date and set the value in-effect as of a certain date. For example, you might have Quota = 750,000 for this fiscal year and Quota = 800,000 for the next fiscal year. Enter the year and click the Go button to have the system display the fields for that year.

Hide Buttons and Show Buttons

Click the Hide Buttons button to hide the Copy button and the Propagate button. Click the Show Buttons button to make these buttons appear on the page.

Frequency ID

Use this field to select a set of periods corresponding to a frequency. You can insert multiple rows and have multiple periods in your definition. This is limited by your calendar frequencies.

Propagate

Use the Propagate button when you have multiple frequencies, such as quarterly and monthly. For example, if you set the annual value to 100,000 and then press this button, the system sets quarterly values to 25,000 each (100,000 divided by 4).

Value

Enter the value of the variable or constant.

Copy

For a monthly value, the Copy button enables you to copy the value for one month to the other months. For example, on a monthly frequency, if you set month 1 to 10,000 and then click this button, the system sets the rest of the months to 10,000. You can then make edits to each month as necessary.

Defining Boolean, Date, Number, and String Variables

Access the Boolean Properties, the Date Properties, the Number Properties, or the String Properties page.

Template Definition

Number Properties

Variable Properties

Variable Name BONUS_PAYOUT_Q **Variable Type** Number

***Description** Quarterly Bonus Payout ☒ **Linked** ☒ **Reportable** ☐ **Enable Tracing**

Unit of Measure **Frequency ID** Quarterly

Values Table

Value Variable ☐ **Display on Manager Page**

* Required Field

OK Cancel

Number Properties page

The Boolean Properties, Date Properties, Number Properties, and String Properties pages are similar and include the fields listed below. The Values ID field is only available on the Number Properties page.

Reportable

Select this check box to have variable replicate to reporting tables for this particular plan. You might clear this check box, for example, if you have a regional variable being accumulated in all plans but the regional variable does not contribute to this plan's incentive payouts. The variable is just accumulated in the plan so that it can be used in the Regional Manager plan. Therefore, on the lower level plans, you would not report on the variable.

Note. Variables used in rules at run-time are persisted to the database whether or not this flag is set. This flag only affects if the variable shows in report. Conversely, reportable variables, even if they are not used in rules at run-time, are reported. They show a zero value for numbers or empty string.

Frequency ID

Select the frequency that is to be used for this variable. Only those frequencies defined for the calendar that has been assigned to the template are available. The frequency value affects calculations by affecting how often the variable is recycled.

If the frequency is monthly, the variable starts with a clean value (zero, empty string, and so on) at the beginning of each monthly run. If the frequency is annual, the system uses the same variable for the whole year. So when you run the next month, the system starts with the value that was saved in the previous month run.

Defining Accessors (Accesses)

Access the Accessor Properties page.

Template Definition

Accessor Properties

Variable Properties

Variable Name

PROD_REV_QUOTA_ACS

*Description

Product Revenue Quota Acs

☒ Linked

*Accesses Variable

PROD_REV_QUOTA

☐ Display on Manager Page

Access Definitions

Access Name	*Description	*Frequency ID	*Access Method	*Relative Period	Start Period	End Period	Report		
PROD_REV_QUOTA_Y	Annual Prod Revenue Quota	Annual	Sum	Current to Da	0	0	<input checked="" type="checkbox"/>		

* Required Field

OK

Cancel

Accessor Properties page

Use the grid to specify the details of how that accessor accesses multi-value variables, aggregator or compound number . Accessors define accesses that you use in the right-hand side of the plan rules to access specific statistics of an aggregator or compound number.

Access Name and Description

Enter an access name and description for each access definition that you want to define to access the variable. You use the access names in the plan rules to access the variable.

Frequency ID

Select the frequency that is to be used for the access definition.

For compound number accesses, the allowable frequencies are defined in the compound number properties on the Compound Number Properties page.

See [Chapter 15, “Defining Plan Templates,” Defining Compound Number and Quota Variables, page 327.](#)

For aggregator accesses, the allowable frequencies are defined in the plan template’s calendar, which is set on the Template Definition page.

See [Chapter 15, “Defining Plan Templates,” Defining Plan Template General and Calendar Information, page 322.](#)

Access Method

Select the access method that you want to use when accessing the variable. The access method determines the type of statistics to calculate: sum, minimum, maximum, average, count, or value. Value is available only for compound number. providing a way to access a specific constituent of the compound number corresponding to a fiscal year and accounting period. The statistical method uses the constituents of the multi-value variable that fall within the range defined by the following three fields on this page. For compound number, the system uses the fiscal year and accounting period of the constituent to determines if it falls in the range. For, aggregators, the system uses the As Of Date (which is often transaction driven) of the aggregator entry to determine if it should be included in the calculation.

Relative Period

Select the period for which you want to access the variable for the given access definition. This field is closely related to the Start Period and End Period fields. The fields determine a time period for the statistical calculation relative to the current processing period through the current date. Your choices are:

Current to Date: The period starts at the beginning of the processing period through the current date. When you select a value for the Relative Period field, the Start Period and End Period fields have no effect.

Future Period: Instructs the system to look at the future period relative to the current period.

Prior Period: Instructs the system to look at the prior period relative to the current period.

Start Period and End Period

Select the relative start and end period for which the access definition accesses the variable and starts adding. These fields are available only when you select *Prior Period* in the Relative Period field. Along with relative period, the values in these fields determine the period for the statistical calculations. The value in the Frequency ID field determines the length of each unit. For instance, say the method is sum, the frequency ID is quarterly, the Relative Period is previous, and the start period and end period are 1 and 1. This means that you want the total of the values in the previous quarter (1 quarter previous the current quarter). Note that even if you are running monthly, this setup will mean the previous quarter. Say that you are running for May. The current quarter is from April 1 to June 30. The previous quarter is from January 1 to March 31. The system will sum constituents falling in the date range from January 1 to March 31. As the year passes, you may run for August. In that case, the date range will be from April 1 to June 30. It is important to remember that the period range is relative to the current period and therefore the date range is dependent on the current processing period and is recalculated in each new run.

Report

Select to replicate results of the access definition to reporting.

See Also

Chapter 12, "Understanding Rule Syntax," Accesses, page 283

Copying Variable Definitions

Access the Copy Variable page.

Template Definition

Copy Variable

PSR-IP-T - Product Sales Rep

PSR-IP - Product Sales Rep Plan

REGN-CP-T - Regional Config Plan

REGN-CP - Regional Config Plan

RMGR-IP - Regional Manager Plan

RMGR-IP-T - Regional Manager Sales Plan

SMGR-IP-T - Sales Manager Plan

SSR-IP-T - Service Sales Rep Plan

SSR-IP - Service Sales Rep Plan

TERR-CP-T - Territory Plan

TERR-CP - Territory Vars (no allocation)

Plan ID

TERR-CP


Plan Name



Territory Vars (no allocation)

Type of Plan

Configuration Plan

Variables

Customize | Find | View All | 

First  1-3 of 3  Last

Variable Name	Description	Variable Type	Variable Visibility
NEW_ACCOUNTS_ATTAIN_MTH	New Accounts Attainment Mthly	OLD Attainment	NDCH
NEW_ACCTS_ATTAIN	New Accounts Attainment	Attainment	NDCH
NEW_ACCTS_ATTAIN_ACS	New Accounts Attainment Acs	Accessor	NDCH




Return

Copy Variable page

The system displays the variable definitions available to copy from existing plan templates and plans. Expand the row to view the variable definitions, then select the variable definition to copy. The system copies this variable definition into the corresponding variable properties definition page. For certain variables such as aggregators and compound numbers, the system appends an underscore and a sequence to the new variable name to give it a unique name.

Referencing Variables

Access the Reference Variables page.

Template Definition					
Reference Variables					
Customize Find View All 					
First  1-30 of 40  Last					
Plan ID	Plan Name	Variable Name	Description	Variable Type	Variable Visibility
REGN-CP	Regional Config Plan	RGN_GRS_PRF_ATTAIN	Regional Grs Profit Attainment	Attainment	Node/Child
REGN-CP	Regional Config Plan	RGN_GRS_PRF_ATTAIN_ACS	Regional Grs Profit Attain Acc	Accessor	Node/Child
REGN-CP	Regional Config Plan	RGN_GRS_PRF_ATTAIN_PCT_YTD	Rgnl Gross Profit Attain % YTD	Number	Node/Child
REGN-CP	Regional Config Plan	RGN_GRS_PRF_ATTAIN_YTD	Regn Gross Profit Attain. YTD	OLD Attainment	Node/Child
REGN-CP	Regional Config Plan	RGN_GRS_PRF_QUOTA	Regional Gross Profit Quota	Quota	Node/Child
REGN-CP	Regional Config Plan	RGN_GRS_PRF_QUOTA_ACS	Regional Grs Prf Quota Acc	Accessor	Node/Child
REGN-CP	Regional Config Plan	RGN_GRS_PRF_QUOTA_YTD	Regn Gross Profit Quota YTD	OLD Quota	Node/Child
REGN-CP	Regional Config Plan	RGN_PROD_REV_ATTAIN	Regional Prod Rev Attainment	Attainment	Node/Child
REGN-CP	Regional Config Plan	RGN_PROD_REV_ATTAIN_ACS	Regional Prod Rev Attain Acc	Accessor	Node/Child
REGN-CP	Regional Config Plan	RGN_PROD_REV_ATTAIN_PCT_QTD	Rgnl Prod Rev Attain % QTD	Number	Node/Child
REGN-CP	Regional Config Plan	RGN_PROD_REV_ATTAIN_PCT_YTD	Rgnl Prod Rev Attain % YTD	Number	Node/Child

Reference Variables page

The system displays the variable definitions available to reference from existing configuration plan templates and plans. Select the variable to reference. The system displays this shared variable definition information into the Reference To group box on the corresponding variable properties definition page. The reference variable is a pointer to a shared variable definition. It provides a means to access a shared variable from an incentive plan or plan template. Shared variables are defined in a configuration plan or a plan template. Shared variable definitions remain the property of the configuration plan or plan template, and instances of shared variables are shared among participants on one or more plans.

Defining Steps, Sections, and Incentive Plan Rules

Access the Template Definition 2 page.

Processing Steps

Expand All

Collapse All

CREDIT - Calculates sales credits

CRD - Credit Routing

CRDORD - Credit Orders

CRDSHP - Credit Shipments

UPDTSHP - Update Shipment Transactions

CRDOPP - Credit Opportunities

CRDNEW - Credit New Accounts

CRDRNK - Credits based on Sls Rep Rank

New Step

*Step ID

Select Method for Adding Section

New

Library

ROLLUP - Rollup Transactions

ROLLUP - Rollup

ROLLUP_NA - Rollup New Accounts

Template Definition 2 page (Processing Steps section)

Steps are made up of a sequence of sections that define your company’s business process steps for incentive calculation. Sections are made up of a sequence of rules that tell your system how to process the transactions needed to calculate incentives for your participants.

Steps are only defined in plan templates. They are inherited by the plans derived from the template, and therefore, you cannot change or edit steps in a plan. It must be done in the template.

Step ID Select the step ID for the step that you are creating. The step ID appears in the row header on the Template Definition 2 page. Only those steps that have the Plan Step, Show in Plan, and Show in Template check boxes selected on the Step Definition page are available for selection.

Select Method for Adding Section Select New to define a new section. The New Section group box appears. Select Library to choose an existing step from the library to access the Library Sections page.

Adding a New Section

Expand the New Section section of the Processing Steps section on the Template Definition 2 page.

The screenshot shows a web-based form titled "New Section" within a light blue header bar. The form contains several input fields: "*Section ID" (a short text box), "*Description" (a medium text box), and "Long Description" (a larger text area with a vertical scrollbar). Below these are three dropdown menus: "Transaction Type", "State", and "Perf. Measure". A section titled "Rule" contains an "Inactive" checkbox, a "Rule Label" text box, an equals sign, a "Rule" text box, and an "Override" section with a small icon and a "Copy" button. At the bottom of the form are several buttons: "Order Rules" (a link), "Validate Rules", "Share Section", "Copy Previous Version" (with an info icon), "Order Steps" (a link), and "Validate Steps". The form is enclosed in a light blue border with a small "+" and "-" icon in the top right corner.

Template Definition 2 page (New Section section)

Sections that you define in the template are inherited by plans. Within the plans, you can add sections that have been created in other templates (shared sections) or define a new section that is to be used only in the plan in which you define it.

Section ID Enter a name for the section that you are creating. This becomes the row header.


Linked Select this check box to link this section to the template. Linked sections remain the property of the template forever. Changes to linked sections affect all plans that inherit from the template. If a section is not linked, then it is copied to the plan at the time the plan is created. This copy becomes the private property of the plan and is therefore independent from the template or any other plan derived from it.

Enable Tracing This functionality is currently not in use.

Transaction Type Select a transaction type. Each step can process only one type of transaction.

State Select a transaction processing state.

Performance Measure Select a performance measure.

Inactive	Select this option to make the rule inactive.
Rule Label	Enter the label for the rule. The label specifies which variable or object holds the results of the rule or expression. A rule label can be a variable that is defined in the plan or the current section, an attribute of the current transaction, or the label can be left blank. If the label is blank, the rule is evaluated, but the results are not stored.
Rule	Enter the expression to be evaluated. An expression is any valid combination of arithmetic expressions involving objects, attributes, constants, and formulas.
Override	This check box displays whether this rule has an override. An override enables you to be able to customize a rule for a specific participant.
	(advanced editor) Click this button to access the Rules group box. Click the Look Up, Formula Syntax, Formula Builder, and Formula Data Setup buttons to create the rule. Click the Validate Rule button to validate the rule that you have created. Click Apply to close the Rules group box and add the rule to the section.
Order Rules	Select this option to access the Order Rules page and change the order of the rules.
Validate Rules	Click this button to validate the rule syntax for the current row. If your variable is referring to a variable defined in another row, the system might display an invalid variable message. You must click the Validate Rules button for the entire section to validate rules across all rows of a section. Similarly, you must click the Validate Rules button for a step to validate rules across all sections of a step. You should validate all steps before saving a plan. If there are validation errors, the system displays an error message next to the offending rules to describe the nature of the problem.
Share Section	Click this button to share the new section to the library.
Copy Previous Version	Click this button to erase the current version of the section and replace it with the most recent previous version.
Order Steps	Select this option to access the Order Steps page and change the order of the steps in the template.

Referencing a Library Section

Select a section from the list of available library sections. The library contains all sections that have been defined in templates or plans that have been identified as shared. You can either copy the section from the library, in which case it is owned by the plan and changes to the library section do not affect the section in the plan, or you can reference the section from the library, in which case changes made to the library section are inherited by the section in the plan.

Sharing a Section to the Library

To share this section to the library so that other plans and plan templates can use it, click Share Section. The Share Section to Library page (EI_SHARE_SECTION) appears. You must validate all incentive plan rules in the section before sharing the section to the library:

If you select Make section a library ref. (make section a library reference), the section is now owned by the library and is a referenced section in the template or plan.

If you select Copy section to library the section remains in the plan template and is independent of the library copy, but it is available in the library for use by other templates and plans. You must validate library sections in each plan where they appear. If a shared section is used by two plans, validating it in one plan is not sufficient.

Defining Incentive Plan Rules

To define an incentive plan rule, enter a rule label and a rule syntax. Use the Advanced Editor for help with the rule syntax. You can change the order of the rules that you create with the Order Rules link. Check the validity of your incentive plan rule by clicking the Validate Rules button. If the rule is invalid, the system displays an error message identifying the cause of the problem.

See [Chapter 12, “Understanding Rule Syntax,” page 269](#).

Cloning a Plan Template

To clone a plan template, use the Clone Template component (EI_CLONE_TMPL).

This section discusses how to clone a plan template.

Pages Used to Clone a Plan Template

Page Name	Object Name	Navigation	Usage
Clone Template	EI_PLAN_COPY	Compensation, Sales Incentives, Define Plans, Clone Template, Clone Template	Clone an existing plan template.
Clone Template - Find Template	EI_PLAN_COPY_SRCH	Click the Search button on the Clone Template page.	Select the template that you want to clone.

Cloning a Plan Template

Access the Clone Template page.

Clone Template

Step 1: Select the existing template that you wish to clone.

Existing Template Attributes

***SetID**

***Template ID**

Product Category

Market Template

Template Name

(You can enter partial information in the fields above to qualify your search.)

Step 2: Specify the attributes of the new template that you are creating.

New Template Attributes

***Template ID**

***Effective Date**

Clone Template page

Cloning a plan template copies an existing template to serve as a starting point for a new template. The new template is an independent copy of the original plan template. For example, linked sections in the source template are not linked to the new plan template clone.

To clone a plan template, enter the information that you know about the source template and click Search to access the Clone Template - Find Template page, which includes a list of all existing templates that match the criteria that you specified. Click the template ID for the template that you want to clone. Enter the template ID and effective date for the new template and click Create to access the Template Definition page. Complete the necessary template data; you can change any of the data cloned from the source template and add any additional data.

See Also

[Chapter 15, “Defining Plan Templates,” Defining a Plan Template, page 320](#)

[Chapter 16, “Defining Plans,” Cloning a Plan, page 348](#)

Updating a Plan Template

This section discusses how to update a plan template.

Pages Used to Update a Plan Template

Page Name	Object Name	Navigation	Usage
Template Definition	EI_TMPL_DEFINITION	Compensation, Sales Incentives, Define Plans, Update Template, Template Definition	Update general and calendar information, transaction allocation rules, and performance measure groupings in an existing plan template.
Template Definition 2	EI_TMPL_DEF_W_2	Compensation, Sales Incentives, Define Plans, Update Template, Template Definition 2	Update the variables, steps, sections, and incentive plan rules in an existing plan template.

Updating a Plan Template

Access the Template Definition and Template Definition 2 pages.

To view the plan template as it existed on a specific date, enter the date in the Go To Date field and click Go.

Templates are always active. You cannot make them inactive.

Note. Before updating a template, make sure that your intended changes will produce the desired effects. For example, although you can delete a linked variable or unlink a linked variable, this may create problems if any of your plans reference the linked variable.

The following table describes the modifications that you can make to a plan template:

Group Box/Template Element	Modifications Permitted
General Template Information	If the template generates plans, you cannot change the template product category, market template, or the type of plan that the template generates.
Calendar Information	You can change the calendar and frequency for a template at any time. The system warns you if a change to the assigned calendar invalidates the frequency settings for any of the plan template variables or any variables in plans generated from the template.
Transaction Allocation	You can add, delete, or modify the transaction allocation rules in the template.
Performance Measure Grouping	You can add or delete new performance measures and sections. You can also change the order of the variable labels and the performance measures and sections. You cannot add or delete performance measure sections members, because the system generates these rows based on the variable labels.
Variable Definitions	If you link a variable that was previously unlinked or add a new linked variable, the system warns you that any variable definitions with the same name will be deleted and replaced.

Group Box/Template Element	Modifications Permitted
Steps	<p>You can add or delete steps in a template. You can also change the order of template steps.</p> <p>When you add a step, it must be consistent with the template product category and market template, and you must select the show in template check box for the step on the Job Steps page.</p>
Sections	<p>If plans have been generated from the template, and you add or change an unlinked section, the changes are not propagated to existing plans. However, plans created <i>after</i> the modification, or that use the <i>same</i> date as the modification, reflect the changes.</p> <p>If you modify a linked section, those changes propagate to the existing plans.</p> <p>If you link a section that was previously unlinked, the system first issues a message. If you decide to continue, the system automatically deletes all instances of the section from plans created from the template. Before modifying a section in this way, verify that this is what you want to do.</p> <p>If you add a new linked section, the system warns you if a plan built from the template already includes a section with the same name. You can still link the section, and the system replaces the existing plan section definition with the linked definition.</p>
Incentive rules	You can add, delete, or modify incentive plan rules. You can also reorder rules or identify them as inactive.

Viewing Plan Template History

This section discusses how to view plan template history.

Page Used to View Plan Template History

Page Name	Object Name	Navigation	Usage
History	EI_PLAN_HISTORY	Compensation, Sales Incentives, Define Plans, Update Template, History	View the history for plan templates and plans. The history shows the dates of all modifications made to plan templates, the modification date, and the nature of the change.

Viewing Plan Template History

Access the History page.



History page

If you obtain unexpected sales incentive results after you’ve modified your plan templates, you can use the History page to help you determine what changes to your plan templates might have caused the results. Use this page whenever you know that there was a change to a plan template but you do not know exactly when the change occurred, thus eliminating the guesswork.

Select a date in the Date of Change column to view the plan template as it existed on that date. This column shows the effective date for each of the changes made to the plan template. The Inheritance section of the Understanding Plans and Plan Templates chapter discusses the effective-date implications in detail.

See Also

Chapter 14, “Understanding Plans and Plan Templates,” Inheritance, page 308

Defining Your Page Setup

This section discusses how to define your page setup.

Page Used for Defining Page Setup

Page Name	Object Name	Navigation	Usage
Page Setup	EI_PLAN_USER	Compensation, Sales Incentives, Define Plans, Update Template, Page Setup	Specify user preferences for the Template Definition and Template Definition 2 pages. These preferences are set at the user level.

Defining Your Page Setup

Access the Page Setup page.

Template Definition
Template Definition 2
History
Page Setup

General

As of Date 31

Display Width
☐ Normal Width
☒ Wide Layout

Hide Information Buttons
☐

Close Information Window After 3 Minutes

Page Assignments

	Page 1	Page 2
General Plan Information	<input checked="" type="radio"/>	<input type="radio"/>
Calendar Data	<input checked="" type="radio"/>	<input type="radio"/>
Allocations	<input checked="" type="radio"/>	<input type="radio"/>
Performance Measures	<input checked="" type="radio"/>	<input type="radio"/>
Variables	<input type="radio"/>	<input checked="" type="radio"/>
Steps and Sections	<input type="radio"/>	<input checked="" type="radio"/>

Steps and Sections

Show Help Buttons Near Rules
☐

Initially Show Steps
☒ Collapsed
☐ Expanded

Initially Show Sections
☒ Collapsed
☐ Expanded

Page Setup page (1 of 2)

Rule Label Colors

Plan Variables

☐ Sample ☒ Sample ☐ Sample ☐ Sample ☐ Sample ☐ Sample

☐ Sample ☐ Sample ☐ Sample ☐ Sample ☐ Sample ☐ Sample

Local Variables

☐ Sample ☐ Sample ☒ Sample ☐ Sample ☐ Sample ☐ Sample

☐ Sample ☐ Sample ☐ Sample ☐ Sample ☐ Sample ☐ Sample

Transaction Attributes

☐ Sample ☐ Sample ☐ Sample ☒ Sample ☐ Sample ☐ Sample

☐ Sample ☐ Sample ☐ Sample ☐ Sample ☐ Sample ☐ Sample

Object Attributes

☐ Sample ☐ Sample ☐ Sample ☐ Sample ☒ Sample ☐ Sample

☐ Sample ☐ Sample ☐ Sample ☐ Sample ☐ Sample ☐ Sample

Apply

Page Setup page (2 of 2)

Use the Page Setup page to reorder the different page elements used to define templates and plans.

General

Specify your user preferences for the General Template Information group box.

- | | |
|--|---|
| As of Date | Templates appear on the date selected. All templates with which you work appear as of this date. |
| Display Width | Select <i>Normal Width</i> or <i>Wide Layout</i> . You may find <i>Wide Layout</i> is better when working with variables, incentive plan rules, and transaction allocation rules. |
| Hide Information Buttons | Select this option to hide the information buttons. |
| Close Information Window After: Minutes | Enter a value to represent the time in minutes after which the information help windows will close. |

Page Assignments

These options control which group boxes appear on the Template Definition pages. For example, to display the Calendar Information group box on the second page, select the Page 2 option for Calendar Data. At least one group box must appear on the second page that displays the Template Definition 2 tab.

Steps and Sections

Specify your user preferences for the Processing Steps group box.

- | | |
|-------------------------------------|--|
| Show Help Buttons Near Rules | Select the check box to display the help buttons near the incentive plan rules. |
| Initially Show Steps | Select Collapsed to collapse the steps sections when the page appears, or select the Expanded option. If you have many steps, you might find it easier to view |

your Template Definition page with the steps collapsed. Specify the same for sections using Initially Show Sections.

Rule Label Colors

Select the rule label colors to use for plan variables, local variables, transaction attributes, and object attributes.

CHAPTER 16

Defining Plans

This chapter discusses how to:

- Define a plan.
- Clone a plan.
- Update a plan.
- Work with plan overrides.
- View plan history.
- View plan summaries.

Note. The Plan Definition pages and the Template Definition pages are almost identical. Because you use the Template Definition pages first when implementing your system, specific page functionality is described in the Defining Plan Templates chapter. This chapter discusses issues that are specific to defining plans.

See Also

[Chapter 14, “Understanding Plans and Plan Templates,” page 307](#)

[Chapter 15, “Defining Plan Templates,” page 319](#)

[Chapter 12, “Understanding Rule Syntax,” page 269](#)

Defining a Plan

To define plans, use the Create Plan (EI_CREATE_PLAN) and Update Plan (EI_PLAN_DEFINITION) components.

This section discusses how to:

- Add a plan.
- Set up general plan information.
- Set up transaction allocation rules.
- Set up performance measures.
- Set up variables.
- Set up processing steps.

Pages Used to Define a Plan

Page Name	Object Name	Navigation	Usage
Create Plan	EI_PLAN_COPY	Compensation, Sales Incentives, Define Plans, Create Plan, Create Plan	Add a plan. Select the source template and specify the plan ID and effective date for a new plan.
Plan Definition	EI_PLAN_DEF_W	Compensation, Sales Incentives, Define Plans, Create Plan, Plan Definition Click the Create button on the Create Plan page.	View basic plan information and define new transaction allocation rules and performance measures for the plan.
Plan Definition 2	EI_PLAN_DEF_W_2	Compensation, Sales Incentives, Define Plans, Create Plan, Plan Definition 2	View inherited plan information and define new variables and sections for the plan.

Adding a Plan

Access the Create Plan page.

Create Plan

Step 1: Select the existing template that you wish to use for creating the plan.

Existing Template Attributes

***SetID** 

***Template ID**

Product Category

Market Template

Template Name

(You can enter partial information in the fields above to qualify your search.)

Step 2: Specify the attributes of the new plan that you are creating.

New Plan Attributes

***Plan ID**

***Effective Date** 

Create Plan page

The purpose of the template is to define common plan features such as rules and variables so that they can be reused by many plans. Each plan is derived from a single template and inherits the definitions contained in a template. A plan can inherit from a template in two different ways. For the first form of inheritance, some item definitions such as transaction allocation rules are copied from the template to the plan at the time the plan is created. Subsequent changes to a template are not reflected in its derived plans because copying only occurs at the time the plan is created. The same holds true for variables defined in a template and without the “linked” attribute. The second form of inheritance involves linked variables. For linked variables, inheritance takes a different meaning. Linked variables, defined in a template, become an integral part of the plans derived from the template where they are defined. In contrast to the first form of inheritance, any change to linked variable definitions, in the template, is automatically reflected in the plans derived from that template. The Inheritance section of the Understanding Plans and Plan Templates chapter discusses the effective-date implications in detail.

Incentive and configuration plans can only be created from templates. The template is the starting point in creating a plan. The basic plan information—product category, market template, and calendar—comes from the template, as well as common transaction allocation rules, performance measure groupings, variables, steps, sections, and incentive plan rules. From the basic framework inherited by the template, you create a unique plan by adding or changing any of these attributes except for steps. Remember that steps can only be created in a template and can only be updated in a template.

Creating a new plan requires searching for the template on which it will be based. To create a new plan, enter the information for the template from which you want to create the plan and click Search. The Find Template page appears with a list of all available templates that meet the criteria that you indicated. Select the template to return to the Create Plan page.

Enter the plan ID and effective date of your new plan, and click Create to access the Plan Definition page.

See Also

[Chapter 14, “Understanding Plans and Plan Templates,” Inheritance, page 308](#)

[Chapter 16, “Defining Plans,” Cloning a Plan, page 348](#)

Setting up General Plan Information

Access the Plan Definition page.

Enter a plan name, description, and long description.

The Template Information group box displays information about the source template for your reference.

The plan effective date is the primary date for the plan definition and controls most plan components, except linked variables and sections from the template, library sections from the section library, and individual overrides.

Click the View Calendar Definition link to view the calendar and default frequency on the Detail Calendar page.

Note. Configuration plans and incentive plans must share the same calendar. If you try to use different calendars, you’ll get unpredictable results.

Setting up Transaction Allocation Rules

Transaction allocation rules are inherited (copied) from the source template at the time the plan is created. Once inherited by the template, however, transaction allocation rules become independent of the template. Any changes made to transaction allocation rules in the template after you create a plan does not carry over to the plan. You can add new transaction allocation rules to the plan, as well as change the order of the existing transaction allocation rules.

Setting up Performance Measures

Performance measure variable groupings are inherited (copied) from the template and like, transaction allocation rules, become independent of the template once you create the plan. You can add additional performance measure groupings to the plan or alter the inherited groupings.

Setting up Variables

Access the Plan Definition 2 page.

Variables that are inherited from the template can be linked to the template. Changes to variables that are identified as linked can only be made in the template, and any changes made to linked variables in the template are inherited by those variables in all plans created from the template. The linked variables are listed first in the plan and are display only. Those variables that are inherited from the template, but not marked as linked, can be changed in the plan.

You can add new variables, constants, and accessors to the plan, or reference a variable from a configuration plan within the same compensation structure. You can also change the order of any of the variables that are not linked to the template.

Setting up Processing Steps

All processing steps are inherited from the template. You cannot add or change steps in a plan.

Sections can be either linked to the template or to the section library. You cannot make any changes to linked sections or the incentive plan rules within linked sections. You can add new sections and incentive plan rules to the steps inherited by a plan as long as there is no existing section with the same name in the plan.

Cloning a Plan

To clone plans, use the Clone Plan component (EI_CLONE_PLAN).

This section discusses how to create a new plan by cloning an existing plan definition.

Page Used to Clone a Plan

Page Name	Object Name	Navigation	Usage
Clone Plan	EI_PLAN_COPY	Compensation, Sales Incentives, Define Plans, Clone Plan, Clone Plan	Clone an existing plan.

Cloning a Plan

Access the Clone Plan page.

Clone Plan

Step 1: Select the existing plan that you wish to clone.

Existing Plan Attributes

*SetID

*Plan ID

Product Category

Market Template

Plan Name

(You can enter partial information in the fields above to qualify your search.)

Step 2: Specify the attributes of the new plan that you are creating.

New Plan Attributes

*Plan ID

*Effective Date

Clone Plan page

The clone plan functionality is useful if you need to create a plan that is only slightly different from an existing plan. A cloned plan is an independent copy of the original (source) plan. Subsequent changes made to the original plan do not affect the clone.

To clone a plan, select the plan to be cloned (the source plan) by searching against the known attributes of the plan and specifying the attributes for the plan that you want to create. Click the Create button to open the Plan Definition pages for the new plan. The new plan retains all of the links to the original template and any new attributes that were created in the cloned plan. You can add new or modify any existing attributes that are not linked to the template.

See Also

[Chapter 15, “Defining Plan Templates,” Cloning a Plan Template, page 336](#)

Updating a Plan

This section discusses how to update an existing plan.

Page Used to Update a Plan

Page Name	Object Name	Navigation	Usage
Plan Definition	EI_PLAN_DEFINITION	Compensation, Sales Incentives, Define Plans, Update Plan, Plan Definition	Update an existing plan.

Updating a Plan

Access the Plan Definition page.

Updating existing plans enables you to incorporate changes that occur to your organization's incentives compensation policy. Before updating a plan, make sure that your changes will have the intended effects. For example, compensation policy changes that affect your entire organization might be more appropriately applied at the template level, whereas changes to policy affecting only a few employees might be better handled by changing the plan, not the template.

To update a plan, view the plan as it existed in the system on a specific date by entering an As of Date. The system validates the plan and displays it as it exists on that date.

Note. Don't try updating a plan by creating a plan override. Overrides are intended to handle exceptions to regular processing that occur due to onetime events for a specific participant, such as overriding a quota for a salesperson for a specific period. Updating a plan enables you to make wider, enduring changes to sales incentives processing.

The following table lists the modifications that you can make to a plan:

Group Box/Plan Element	Modifications Permitted
General Plan Information	You can modify the plan name, description, and long description. When you change a plan, your changes are applied as of the plan effective date, not the as of date. The as of date only controls what appears on the Plan Definition page.
Calendar Information	Calendar and frequency information cannot be changed at the plan level.
Transaction Allocation	You can add, modify, or delete transaction allocation rules.
Performance Measures	You can add, modify, or delete performance measure variable groupings.
Variables	You can add, edit, or delete unlinked variables, and change their order (linked variables always appear before other plan variables and are read only). If you add a plan variable, there cannot be an existing variable with the same name. You can add or delete referenced variables.

Group Box/Plan Element	Modifications Permitted
Processing Steps	You cannot add or delete steps, or rearrange their order. You can only validate plan steps.
Sections and incentive plan rules	<p>You can edit unlinked sections and the rules within those sections. You can change the order of linked and unlinked sections.</p> <p>You can add new sections to a plan as long as there is no existing section with that name. You can add sections by creating them, or by referencing or copying existing sections from the section library. Referenced sections always belong to the library. Copied sections belong to the plan and are independent; changes to copied sections do not carry forward to other plans.</p>

Working with Plan Overrides

This section discusses how to:

- Set up overrides for plan participants.
- View all overrides for a plan.

Pages Used to Work with Overrides

Page Name	Object Name	Navigation	Usage
Usage	EI_PLAN_USAGE	Compensation, Sales Incentives, Define Plans, Update Plan, Usage	Select a participant for whom to create an override.
Overrides	EI_PLANW_OVERRIDE	Compensation, Sales Incentives, Define Plans, Update Plan, Overrides	View existing plan overrides.
Maintain Overrides	EI_PLAN_OVRIDE_SEC	<ul style="list-style-type: none"> • Select a participant on the Usage page. • Select a participant on the Overrides page. 	Add or cancel an override for a participant.

Setting Up Overrides for Plan Participants

Access the Usage page.

Select the participant for whom you are creating the override. The Usage page displays all of the participants as they are attached to the nodes of the compensation structures to which the plan is attached. When you select the participant, the Maintain Overrides page opens. Enter the date that you want the override to be effective, and click Create Override to access a view-only version of the Plan Definition page. An Override button appears next to those elements for which you can create an override for this participant. You cannot create an override for linked variables, sections, or rules.

Click the Override button to access the fields that you need to alter for the override and make the necessary changes. Click OK to save your changes and return to the Maintain Overrides page. When you save your changes, the system saves the override separately from the plan, leaving the plan unchanged. You can optionally enter an ending date for all overrides defined for this participant.

See Also

[Chapter 16, “Defining Plans,” Viewing Plan Summaries, page 353](#)

Viewing All Overrides for a Plan

Access the Overrides page.

Use the Overrides page to view a list of participants associated with the plan and whether an override has been defined for them.

This page displays the participant name, compensation structure, compensation node, and indicates if there are any active overrides defined for the participant.

You can also add an override for a participant from this page by clicking the Edit button.

Viewing Plan History

This section discusses how to view the history of changes in a plan.

Page Used to View Plan History

Page Name	Object Name	Navigation	Usage
History	EI_PLAN_HISTORY	Compensation, Sales Incentives, Define Plans, Update Plan, History	View all changes made to the plan beginning with plan creation.

Viewing Plan History

Access the History page.

Use the History page to view all changes that have been made to a plan. This page shows modification history for changes made directly to the plan—for example, adding a section—as well as indirect changes, such as those resulting from a change to the plan template from which the plan was derived. For example, if you changed a linked section in a plan template, the change appears on the History page for the plan template, as well as for the plans derived from the template.

If you add a new variable to a template, the system creates new derived plans with an effective date equal to the As of Date of the template. The new plans are identical to the old plans except for the changes in the linked template items and any new non-linked items, both of which are incorporated into the new plans.

Select a date in the Date of Change column to view the plan as it existed on that date. This column shows the effective date for each of the changes made to the plan and plan template. The Inheritance section of the Understanding Plans and Plan Templates chapter discusses the effective-date implications in detail.

Viewing Plan Summaries

To view plan summaries, use the View Plan Summaries component (EI_SYBAT_PLSUM).

This section discusses how to view plan summaries.

Pages Used to View Plan Summaries

Page Name	Object Name	Navigation	Usage
Plan Rules	EI_SY_BAT_PLN_PG	<ul style="list-style-type: none"> Compensation, Sales Incentives, Define Plans, View Plan Summary, Plan Rules Click the Plan ID link for the participant on the Participant Data page. 	Review and interpret plan rule details for the sections and steps of an incentive or configuration plan as of a specific date to ensure accuracy and completeness.
Variables	EI_SY_BAT_PLN_V_PG	<ul style="list-style-type: none"> Compensation, Sales Incentives, Define Plans, View Plan Summary, Variables Click the Plan ID link for the participant on the Participant Data page. Then click the Variables tab. 	Review a list of all variables associated with an incentive or configuration plan for a specific date. The system displays details about the variables such as the variable name, description, plan IDs, and reference variable name, frequency, and initial value.
Plan Usage	EI_SY_PLSUM_OVRD	<ul style="list-style-type: none"> Compensation, Sales Incentives, Define Plans, View Plan Summary, Plan Usage Click the Plan ID link for the participant on the Participant Data page. Then click the Plan Usage tab. 	View a list of all compensation structure nodes that use the selected plan, the participants associated with the plan usage, plan status and effective date, and whether there are plan overrides.
<Variable Name> Details	EI_SY_PLV_PVAC_SEC	Click the Details button on the Variable page for a selected variable.	View the definition details of a selected variable of the plan.
Maintain Overrides	EI_PLAN_OVERRIDE	<ul style="list-style-type: none"> Select the View/Create Override Plan button on the Plan Rules page. Select the View/Create Override Plan button on the Plan Usage page. 	Add, edit, or cancel an override for a participant.

Reviewing Plan Rule Details

Access the Plan Rules page.

Plan RulesVariablesPlan Usage

Plan Rules Summary

Product Sales Rep Plan

Plan ID

PSR-IP

Template

PSR-IP-T

SetID

SHARE

Effective Date

01/01/2001

View Information as of Date

Specify Date

09/10/2004

Refresh

Allocations

RORD

AND (RawOrderTransaction.PROD_EIM_KEY ISIN Product["PRODUCTS"].EIM_KEY , OR
(RawOrderTransaction.TRANSACTION_TYPE ="ORD" , RawOrderTransaction.TRANSACTION_TYPE
= "SHP" , RawOrderTransaction.TRANSACTION_TYPE = "ADJ"))

Steps and Sections

Step ID

CREDIT

Step Order

100

SECTION : CRD

TXN TYPE: EORD

LEVEL: 100

IF (ORDER.TRANSACTION_TYPE = "ORD" , ProcessInSection ("CRDORD"))
IF (ORDER.TRANSACTION_TYPE = "ADJ" , ProcessInSection ("CRDORD"))
IF (ORDER.TRANSACTION_TYPE = "SHP" , ProcessInSection ("CRDSHP"))

SECTION : CRDORD

TXN TYPE: EORD

LEVEL: 998

CREDIT_PCT = IF (ORDER.SOURCE_CD = "3RDPTY" , 0.25 * 0.5 , 0.5)
ORDER.PERF_MEASURE = "PROD_REV"
ORDER.BASE_AMT = ORDER.SALES_AMOUNT
ORDER.CREDIT_FACTOR_PCT = CREDIT_PCT

Plan Rules page

Specify Date

Specify the date for which you want to view a summary of the selected plan.

Refresh

Click this button to refresh the display based on the newly selected date.

Reviewing Plan Variable Details

Access the Variables page.

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Plan Rules Variables Plan Usage

Variables

Product Sales Rep Plan

Plan ID PSR-IP **Template** PSR-IP-T **SetID** SHARE **Effective Date** 01/01/2001

View Information as of Date

Specify Date 09/10/2004

Variables Customize | Find | View All First 1 of 1

Details	Variable Name	Description	Variable ID	Value	Frequency ID	Source Plan ID	Source Variable ID	Reference Plan ID	Reference Variable ID	Reference Variable
	PROD_REV_QUOTA_ANNUAL	OLD Quota	3855	750000	Annual	PSR-IP	3855			
	PROD_REV_ATTAIN_YTD	OLD Attainment	3856	0	Annual	PSR-IP	3856			
	BONUS_PAYOUT_QTR	OLD Number Variable	3857	0	Quarterly	PSR-IP	3857			
	NEW_ACCTS_PAYOUT_MTH	OLD Number Variable	3858	0	Monthly	PSR-IP	3858			
	BONUS_PAYOUT_ANNUAL	OLD Number Variable	3859	0	Annual	PSR-IP	3859			
	REP_RANK	OLD Number Variable	3860	0	Annual	PSR-IP	3860			
	PROD_REV_ATTAIN	Attainment	501871			PSR-IP-T	501871			
	PROD_REV_QUOTA	Constant Quota	501872			PSR-IP-T	501872			
	PROD_REV_QUOTA_ACS	Accessor	501873			PSR-IP-T	501873			

Variable page

Details

Click this button to access the <Variable Name> Details page, where you can view definition details of the selected variable.

Reviewing Plan Variable Details

Access the <Plan Name> Details page.

PROD_REV_ATTAIN Details

Variable Details

Variable Name PROD_REV_ATTAIN **Variable Type** Attainment

Description Product Revenue Attainment **Frequency Name**

Unit of Measure

Values Table ☒ **Linked** ☒ **Reportable** ☐ **Enable Tracing**

Value **Variable Visibility** Plan Only Visibility

Accesses Variable ☐ **Display on Manager Page**

Access Definitions Customize | Find First 1 of 1 Last

Variable ID	Variable Name	Access Name	Description	Frequency Description	Start Period	End Period	Reportable
1	501875 PROD_REV_ATTAIN_ACS	PROD_REV_ATTAIN_Y	Annual Prod Rev Attain	Annual			<input checked="" type="checkbox"/>

<Variable Name> Details page

Reviewing Plan Override Details

Access the Plan Usage page.


Plan Rules Variables **Plan Usage**

Plan Usage


Product Sales Rep Plan









Plan ID PSR-IP **Template** PSR-IP-T **SetID** SHARE **Effective Date** 01/01/2001

View Information as of Date

Specify Date 09/10/2004  **Refresh**

Plan Usage

Customize Find View All  First 1-14 of 14 Last

 Active Overrides	Participant Name	Compensation Structure	Compensation Node	Description	Effective Date	Status
 No	Ray, Stephen	WORLD	CENTRAL	Central	01/01/2001	Active
 No	Ralphs, Sandy	WORLD	MOUNTAIN	Mountain	01/01/2001	Active
 No	Rabbitt, Sam	WORLD	PACIFIC	Pacific	01/01/2001	Active
 No	Murphy, Terry	GBIBU STRUCTURE	BALBOA	Balboa	01/01/2001	Active
 No	Houseman, Jerry	GBIBU STRUCTURE	BAY_AREA	San Francisco Bay Area	01/01/2001	Active
 No	Dacio, Margaret	GBIBU STRUCTURE	CENTRAL US200	US200	01/01/2001	Active
 No	Maaks, Danielle	GBIBU STRUCTURE	CENTRAL US300	US300	01/01/2001	Active

Plan Usage page

View/Create Override Plan Click this button to access the Maintain Overrides page, where you can add, create, or cancel overrides for the selected plan usage.

Creating Plan Overrides

Access the Maintain Overrides page.

Overrides


Maintain Overrides


Override Details

Compensation Structure GBIBU STRUCTURE


Compensation Structure Node EASTERN

Plan Name Regional Config Plan

Create override as of date:  **Create Override**

Cancel all overrides as of date:  **Cancel All Overrides**

Current Overrides

Customize Find  First 1 of 1 Last

Effective Date	Override Action	Edit	Delete
1 01/01/2001	Override Added	Edit	Delete

Maintain Overrides page

CHAPTER 17

Managing Incentive Transactions

This chapter provides an overview of incentive transaction management and discusses how to:

- Create draws.
- Create splits.
- Manage payouts.

Understanding Incentive Transaction Management

Incentive transaction management enables you to create draws, splits, and payouts for your participants. Within each of the market templates, you can create and update various transactions specific to that market template. These transactions are discussed in the *PeopleSoft Enterprise Sales Incentive Management for High Tech and Industrial 8.9 PeopleBook* and the *PeopleSoft Sales Incentive Management for Banking Capital Markets 8.9 PeopleBook*.

- Draws.
- Splits.
- Payouts.

Draws

Sales Incentive Management enables you to create recoverable and nonrecoverable draws for participants in your business unit.

Recoverable draws are recovered against a participant's future incentive compensation. If draw transactions for a participant have already been issued, you can modify the amount of future draw transactions that have not been issued, but cannot modify the draw schedule. You cannot change any draw information for draw transactions that have been posted to the ledger.

When you create new draw transactions, they are held by the Sales Incentive Management system and then released according to the schedule that you define. The system calculates the draw date for each transaction using the draw start date, the frequency specified for the draw, and the calendar associated with the incentive plan. The draw start date is tied to the incentive plan and frequency associated with that plan.

To determine the draw amount issued per period, the system checks the ledger to determine the incentive payout amount for the participant for that period. Whether a draw is issued that period is dependent upon:

- If there is no incentive payout, the system issues the full draw amount, and updates the outstanding draw balance (if the draw is recoverable) and status for each draw transaction.

- If the incentive payout amount is less than the draw amount, the system issues the difference between the draw amount and the incentive payout amount, tracks the partial draw amount, and updates the status for each draw transaction.
- If the incentive payout amount is more than the draw amount, the system recovers some of the previously issued draw amount.
- If there is no draw transaction for the period, the system verifies whether there is an outstanding draw balance. If so, the system recovers the draw balance against the compensation amount for the period.

Splits

During initial transaction processing, the Sales Incentive Management system automatically allocates transactions during the transaction allocation process to the relevant participants by using the incentive plan transaction allocation rules. In cases where a single transaction must be credited to more than one participant or participant group, and where the transaction allocation process does not account for this information, Sales Incentive Management enables you to enter split transactions to reward the appropriate participants before the crediting process continues.

For new split transactions, the system clones the original allocated transaction from the Enterprise Incentive Management transaction table to create new split transactions. New split transactions are written to the Enterprise Incentive Management transaction table with a new transaction number value. Apart from attributes that identify the new split transaction, these transactions are identical to the original allocated transaction.

For a selected business unit and transaction, the Create Split page displays the participants and allocations associated with that transaction resulting from the allocation process. The system determines whether a transaction is split by examining the claim ID for the transaction. If the claim ID is greater than zero, the transaction has been split.

You can select any allocation transaction and create as many splits as required to reward other participants. Each split transaction that you create is a new transaction cloned from the allocated transaction. The Create Split page enables you to further split allocated transactions that the system has generated before these allocated transactions are credited.

Define a split transaction using an amount value or a percentage of the allocated transaction. If you enter an amount, the system calculates the percentage. If you enter a percentage, the system calculates the amount. The calculation of the split amount or percentage is based upon the amount of the allocated transaction.

The system records all modifications to split transactions to track changes for auditing purposes.

Payouts

Sales Incentive Management enables you to modify payout transactions or add payouts for onetime payments. If you have a payout that cannot be handled by the regular system processing that is controlled by incentive plans, you can create a payout.

After the incentive calculation process runs, system transaction data is set to an accrued state. Sales Incentive Management payout formulas aggregate compensation data in an accrued state before sending the information to the enterprise incentive management ledger at the end of each pay period and disbursing payments to participants.

Add or update a payout transaction manually before the system pushes the transaction to the enterprise incentive management ledger. You can create new payouts, or edit existing payout transactions by modifying the payout date, amount, status, and run state.

Modifications to existing payout transactions and new payout transactions are logged to a journal to track changes for auditing purposes. Once a payout transaction has been posted to the enterprise incentive management ledger, it cannot be edited. However, you can reset a payout transaction, in which case a reversing entry is made to the enterprise incentive management ledger.

Sales Incentive Management payout functionality works by aggregating the payout transactions for each participant according to business unit, run context, participant, incentive plan, payment code, currency code, and unit of measure. Aggregated payout transactions are then posted to the enterprise incentive management ledger. These aggregated transactions are updated to indicate that the transactions have been posted.

Creating Draws

To create draws, use the Create Draw component (EI_DRAW).

This section discusses how to:

- Select a draw participant.
- Create a draw.

Pages Used to Create Draws

Page Name	Object Name	Navigation	Usage
Create Draw - Select a Participant	EI_CSTR_SEARCH	Compensation, Sales Incentives, Calculate Incentives, Create Draw Enter a business unit and click Add.	Select the participant for whom you are scheduling the draw.
Create Draw	EI_DRAW	Compensation, Sales Incentives, Calculate Incentives, Create Draw, Create Draw	Define a new or modify an existing draw schedule.
Scheduled Draws	EI_SCHEDULED_DRAW	Click the View Scheduled Draws link on the Create Draw page.	View all scheduled draws for the selected participant.

Selecting a Draw Participant

Access the Create Draw - Select a Participant page.

Create Draw - Select a Participant page

Use the Create Draw - Select a Participant page to select the participant for whom you are scheduling the draw. You can locate the participant either by using Query Builder or by drilling down into the compensation structure tree for the business unit.

To use Query Builder, click the Search for a Participant link.

Select a Value from Territory

Use the compensation structure tree to locate the participant. Change the as of date if you need to view the compensation structure tree as of a different date. Expand the nodes on the tree to locate and select the participant.

Create a Draw

Access the Create Draw page.

Create Draw

Business Unit GBIBU **Draw ID** NEW

Draw Details

Participant	KU0051	Murphy,Terry	Reassign Draw
Plan	PSR-IP	Product Sales Rep Plan	View Scheduled Draws

***Payment Code** Draw

***Draw Start Date**
***Amount Per Period** USD

***Frequency ID** Monthly
 ***No of Draw Periods**

☐ **This Draw Is Recoverable**

[Show Draw Schedule](#)

Draw Transactions

	Draw Date	Status	Draw Scheduled	Incentive Earned	Draw Issued	Amount Recovered	Draw Balance
1	11/30/2004	Active	1000.000	0.000	0.000	0.000	0.000
2	12/31/2004	Active	1000.000	0.000	0.000	0.000	0.000

Create Draw page

Use the Create Draw page to set up draws for a participant. A single participant may have multiple draws. You can reassign a draw to another participant at the time the draw is created or after the draw is saved. You cannot reassign a draw after a draw payment for a draw has been issued. You can also access the Create Draw page by using Query Builder to query the draw transaction objects defined in your system object catalog and clicking the link for the draw object that you want.

Payment Code

Enter the payment code. The payout system uses this payment code to aggregate the total payment amount to be sent to the ledger and the external payroll system. For recoverable draws, the system uses the payment code to track the outstanding draw balance to enable future recovery.

Payment codes are maintained using the Payment Codes page .

Draw Start Date

Enter the date the draw schedule should begin. The system schedules the first draw payment to occur at the end of the period that corresponds with this date.

Amount Per Period

Enter the amount per draw period. If you are modifying an existing draw, changing this value only changes the amount of the remaining draws in the schedule, not draws that have already been paid.

Frequency ID

Displays the default frequency defined in the incentive plan for the participant. You can select a different frequency but only from the frequencies defined in the calendar assigned to the business unit.

No of Draw Periods
(number of draw periods)

Enter the number of draw transactions that you want the system to generate for this transaction.

This Draw is Recoverable

If the draw is recoverable, select this check box and enter the Recovery Start Date and the Recovery Stop Date.

The start date indicates the date on which outstanding draw balances are to be recovered against earned incentive compensation. The stop date indicates the date on which the recovery of outstanding draw balances should end. If you leave the Recovery Stop Date field blank, the system does not stop recovery until the outstanding draw balance is zero.

Show Draw Schedule	Click this button to view the schedule that the system generates once you save the draw.
Clear Draw Balance	For existing draws, click this button to reduce any remaining draw balance to zero.
Reassign Draw	Click this link to return the Create Draw - Select a Participant page, where you can assign a different participant to the draw. Once you save the draw schedule, this link is no longer available.
View Scheduled Draws	Click this link to access the View Scheduled Draws page, where you can view all draws scheduled for the participant.

Creating Splits

To create splits, use the Create Split component (EI_TRANS_SPLIT).

This section discusses how to create a split and view the allocation details.

Pages Used to Create a Split and View Allocation Details

Page Name	Object Name	Navigation	Usage
Create Split	EI_TRANS_SPLIT	Compensation, Sales Incentives, Calculate Incentives, Create Split, Create Split	Select a transaction and specify allocation amount or percentage to other participants.
Allocation Transaction Details	EI_ALLOC_TRANS_DTL	Click the Allocations button on the Create Split page.	View allocation transaction details.

Creating a Split

Access the Create Split page.

Create Split

Business Unit CORP1 **Transaction ID** C142

Transaction Details

Type	Staging Order Transaction	As Of	03/31/2001	Amount	50000.00 USD
-------------	---------------------------	--------------	------------	---------------	--------------

Allocations Find First 1 of 1 Last

Seq	Participant	Plan	Comp Structure	Amount	Perf. Measure	Split Status
1	KUI009 Vandernoot,Dirk	SMGR-IP Sales Manager Plan	CORP1 BUSINESS_DEV	25000.000 NA_SALES	AREA_SAL AREA_SALES	Split

Split Transaction for Allocation 1

Participant ID	Participant Name	Plan	Description	Perf. Measure	Split Amount	Split Pct	
KUI009	Vandernoot,Dirk	SMGR-IP	Sales Manager Plan	AREA_SAL	25000.000	50.00	+ -
KUI030	Houseman,Jerry	SMGR-IP	Sales Manager Plan	AREA_SAL	25000.000	50.00	Reassign + -

Totals

Split Amount Total	50000.000	Split Percentage Total	100.00
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Apply Reset

Create Split page

The Create Split page displays the original transaction and any existing allocations.

After you define a split transaction, the system generates new transactions from the original allocated transaction. These new transactions are identical to the original allocated transaction except for the compensation structure relationship, base amount, and performance measure.

Save your changes by clicking the Apply button. Clicking the Reset button reverts the split transaction to its previous state before it was modified.

Allocations

The Allocations group box displays the details of the original allocations of the transaction, as well as the current split status of each allocation.

Split Status

Indicates whether the current transaction has already been split. Values are *Split* and *Not Split*.



Click this button to access the Allocation Transaction Details page and view details of the transaction allocation. The Modified by UI check box indicates whether the allocation transaction has been modified since initial transaction allocation processing.

Split

Click this button to add a new split or view an existing split for a transaction allocation.



Indicates which allocation's details appear in the Split Transaction for Allocation group box.

Split Transaction for Allocation

You can modify the split amount and percentage of the original allocated transaction, but you can't delete or reassign it. You can also modify the split amount or percentage of each split transaction, as well as delete or reassign them.

Perf. Measure (performance measure)

Select the performance measure to which the split transaction amount should be credited. Performance measures are maintained using the Performance Measures page.

Split Amount	Enter the split amount. The total of all split amounts for all participants can exceed the base amount of the original allocation.
Split Pct (split percentage)	Enter the split percentage. The total of all split percentages for all participants can exceed 100% of the original allocation.
Reassign	Reassign the split to another participant. This link not available for the original participant.

Managing Payouts

To update payouts, use the Update Payout component (EI_PAYOUT).

This section discusses how to:

- Select a participant for a new payout.
- Manage payouts.

Page Used to Manage Payouts

Page Name	Object Name	Navigation	Usage
Update Payout - Select a Participant	EI_CSTR_SEARCH	Compensation, Sales Incentive, Calculate Incentives, Update Payout Enter a business unit and click Add.	Select a participant for the payout.
Update Payout	EI_PAYOUT	Compensation, Sales Incentives, Calculate Incentives, Update Payout, Update Payout	Update payout transaction details.

Selecting a Participant for a New Payout

Access the Update Payout - Select a Participant page to select the participant for whom you are creating the payout. You can locate the participant either by using Query Builder or by drilling down into the compensation structure tree for the business unit.

Managing Payouts

Access the Update Payout page.

Update Payout

Business Unit GBIBU **Transaction ID** H300 **As Of Date** 01/31/2001

Payout Transaction

Participant ID 768	Ralphps,Sandy
Plan ID SMGR-IP	Sales Manager Plan

Payment Code BONUS Bonus

Payout Date 11/02/2004 **Payout Amount** 1000.00 USD

***Frequency ID** 1 Monthly **Status** Active

Run State ☒ Ready ☐ Held

Update Payout page

Use the Update Payout page to manage a payout transaction for a participant. You can modify an existing incentive payout or create a onetime payout. You can also reassign a payout to another participant as long as the payout has not been posted to the enterprise incentive management ledger.

Payment Code	Select a payment code. The payout formula uses the payment code to aggregate the total payout amount to be posted to the enterprise incentive management ledger or external payment system.
Payout Date (compensation date)	Select the date the payout should occur.
Payout Amount	Enter the amount of the payout.
Frequency ID	Displays the default frequency defined in the incentive plan for the participant.
Run State	Indicate whether the payout should be processed or held: <ul style="list-style-type: none"> • Select <i>Ready</i> to process the payout the next time that you run the engine. • Select <i>Held</i> to hold the payout and refrain from posting it. To process the payout, access this page and change the state to <i>Ready</i>.

CHAPTER 18

Processing Incentive Transactions

This chapter discusses how to:

- Define jobs.
- Clone jobs.
- Schedule jobs.
- Monitor jobs.
- Monitor jobs by period.
- Manage payment processing.
- View participant details.
- Manage participant reports.

See Also

[Chapter 2, “Understanding Sales Incentive Management,” SIM Engine Architecture, page 19](#)

[Appendix A, “Sales Incentive Management Reports,” page 467](#)

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Understanding Job and Participant Management

This overview discusses:

- EIM jobs.
- Job schedules.
- Job status monitoring.
- Compensation administrator tools.

See Also

[Chapter 2, “Understanding Sales Incentive Management,” SIM Engine Architecture, page 19](#)

EIM Jobs

This section discusses:

- EIM job definitions.
- Batch queries.

- Jobs and workflow.

Overview

Sales Incentive Management processes transactions and calculates incentives through a collection of job steps that constitute an EIM job. Steps are defined within your plan templates and plans. You set up an EIM job definition to perform these steps, and use the process control monitor to set up, manage, and schedule processing. Job steps can perform any task that is relevant to your business processing and which can be tied to the EIM engine.

Job steps can be defined to:

- Import reference data.
- Convert raw (staged) transactions to Sales Incentive Management transactions.
- Calculate credits.
- Calculate sales incentives.
- Report incentive results to participants.
- Generate payouts.

Job Definitions

Each step in your business process can be mapped to a corresponding job step in an EIM job definition. A job definition also specifies the order in which job steps are performed.

An EIM job definition is associated with a business unit, product category, and market template. These elements restrict the choice of plan templates and compensation structures available for the job. If you are processing plans you can load the processing steps associated with the plan template into the job. Calendar and frequency are also set through the template selection at the job level.

A job definition specifies the *processing scope* for the job; that is, the portion of the compensation structure to process, the job query (the batch of transactions to be processed that was identified by running a query using Query Builder), and business process (steps). If required, a job can process transactions for an entire compensation structure, or only a specific node, or just one participant. To process the correct participants, plans, and transactions that fall within the scope defined for a job, the system takes into account the plan context, period context, and run-level context.

The job steps that you run in a job at any given time will depend largely on your business model. EIM job definitions provide many options to meet your organization's processing requirements. You can run a job, or parts of it as frequently as you want. For instance, you might run specific processing steps frequently, or run a larger process less frequently. You can even run a part of a job and later continue from the step where you stop.

One plan template is selected for a job. It, not only, determines the plans included in the processing scope, but also ties the job definition to a specific plan calendar. You have the option of processing all plans from the template, or of processing specific plans. The plans that are selected for processing must all be based on the same plan template, and hence share the same calendar. You can only initiate processing through incentive plans, not configuration plans.

Each job processing step is associated to a specific processing engine that is responsible for executing that step; the process controller orchestrates the execution of these steps by invoking the appropriate system engines in order. You can include the same step in a job multiple times if required.

Every job that processes transactions must be associated with a compensation structure. Jobs that don't, for example, a job that loads reference data need not be associated with a compensation structure.

Jobs can be cloned. Cloning a job creates an identical copy of the original job. A clone can be used as a starting point for creating a similar job.

A job cannot be modified while in processing. To modify a job, you therefore have to wait until processing has been completed or aborted. If you do not want to stop processing and cannot wait to run a modified version of that job, you have the option of cloning the job, modifying the cloned job, and running it.

Batch Queries

To identify the source data to process, you can run a query that is identified as a Job Query using Query Builder, and then associate the returned query results—which will consist of a batch of transactions—with a job definition. You can also associate Job Queries to a job, but you must use a predefined query ID. (This query must be defined as a public query and the original Class ID for such queries should only point to staging classes. At runtime, the query is run once and the results remain in effect until the job ends – therefore new transactions becoming available while the job is processing are not processed by the job). Using a query to select transactions helps control how many are processed. For instance, you can run a job for a specific transaction, or you can limit the number of transactions to say 10,000 in order to control the load on the system.

Jobs and Workflow

You can use workflow with your job definitions. You can create workflow definitions that control job processing. During job definition you can select one of the predefined workflows. If workflow is associated, the run treats it like a stop point (which is a job step that you select the run to stop on before continuing with further processing), and the engine pauses the job run instance after invoking the business process that is defined against the workflow definition.

Note. You must define the workflow yourself and configure it by using the Process Control Workflow page located under Compensation, Sales Incentives, Define Sales Incentive Options, Process Control Workflow.

See Also

[Chapter 3, “Defining Sales Incentive Management General Options,” Setting Up SIM Workflow, page 50](#)

Job Schedules

After defining a job, you define a job schedule for the job. Jobs can be executed on an ad-hoc basis as required, or can be scheduled to run automatically. Each job schedule is associated with a job and a business unit.

A job schedule controls how the system engine selects the processing period, the period for the job run, the transactions to include (based on transaction date), and the compensation structure version to use, based on the structure’s date.

You might find that you run some jobs only once, and others on a regular basis, such as month-end transaction processing for a specific sales group. For regular jobs, you should create a recurrence that meets your processing requirements. For example, if you process transactions once a month, you can create a recurrence schedule to satisfy that requirement.

For example, you may want to credit transactions on a daily basis. If so, you can create, for example, a January job with a daily recurrence schedule for the whole month of January and a little into February to capture late arrival January transactions, after which you close the January job and start the February job with recurring schedule on a daily basis. Recurrence schedules enable you to make sure that important jobs that must be run on a regular basis will always run—automatically—in the background. Once you specify a recurrence schedule, the scheduled request will continue until you cancel it from the Process Monitor (the Schedule Jobs page has a link to enable you to do this).

To allow you to create “what-if” projections for sales incentives, the system enables you to create projected job runs that let you see how projected sales impact your bottom line. Incentive results generated from a projected run are marked to indicate they are projected results. You can create real and projected runs from the same job and run them concurrently.

Note. Two jobs based on the same templates and with overlapping periods are prevented to run simultaneously by the system to guard against the risk of getting unpredictable results as the jobs can interact with each others.

One needs to think carefully about the interdependence of jobs and how the way they are run can impact the results. For instance, let’s say that you have one job that calculates compensation for salespeople and another that calculates compensation for managers. The manager compensation depends on that of the salespeople they manage. You cannot run the manager’s compensation plan first. You first need to know how the salespeople did before you can determine the compensation that the manager deserves. However, it may not be necessary to complete the entire salespeople plan. You might only need to run the salespeople plan up to a critical step to get the data (stored in variables) that is required by the manager plan. Variables is one of the key way that jobs can become interrelated.

See Also

[Chapter 18, “Processing Incentive Transactions,” Scheduling Jobs, page 381](#)

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Job Status Monitoring

An job run is the processing of a job definition that occurs between the first time it is run until it is closed. Sales Incentive Management enables you to monitor your EIM jobs both during and after job run execution. For example, a job run can be:

- Continued.

This enables you to continue the job from the next start point of the job. This way you can examine the results after a logical stop point and progress the job forward to its conclusion.

- Paused in mid-run.

Pause suspends processing for a run and makes unavailable the UI so that you cannot change any values for a run. You might pause a job run if you do not want any scheduled instances to get activated. You can resume the job run when ready.

- Rolled back to a previous step to correct calculation results.

Rollback works similar to an undo function. A rollback returns the database to the state it was at a particular time, with respect to this job. Doing so may leave other jobs in an inconsistent state, if for instance, the other jobs use the same variables as the job being rolled back. It may be necessary to roll back several jobs in order to maintain a consistent state.

- Closed.

You can add a close step as the last step in a job definition (in which case the job closes automatically) or execute a close from the Run Monitor. If a run is closed, the job process controller abandons the run and creates a new run when evaluating the same period criteria. One interesting effect of closing a run is that it preserves a snapshot of all the variables as they were at the time it was closed. Subsequent runs continue to build on these values, but they can not modify the values contained in the snapshot. Instead new copies of the variables are created and updated.

- Aborted.

You can stop the instance of a job that is currently running.

- Run now.

You can schedule any step from the Run Monitor if the previous steps have completed.

You can control how steps are processed: you can define stop steps and then have the job resume processing after, for example, you've reviewed interim results. You also can restart a run from the first step, in which case the run includes new transactions and processes them incrementally.

You can execute any job step that is part of a run on an ad hoc basis provided that the preceding steps have completed. You can also run a specific participant through a job run if you need to handle his or her processing separately from the rest of your batch query; for example, if a participant is terminated and you need to process payout for that participant outside of your usual processing schedule.

It is possible to queue a job to run several times. If that happens, the system displays information for each queued instance of the job. Only one of the jobs run at a given time. The system marks the other job as pending. When the job that is running is completed, click the Restart button.

Sales Incentive Management provides process status data about the individual steps in a job run and the ability to run individual steps as required.

There are two components through which you can access a job that you want to monitor—the Monitor Jobs component and the Job Monitoring by Period component. Each component has a unique purpose.

Use the Monitor Jobs component to search for a job based on Job ID to view details related to that job. This component provides you with information related to the node, such as business unit, plan template, and compensation structure as well as important information related to the process, such as start date and time, job status, and period begin and end dates. You can use the Monitor Jobs component to view a job that is in process and issue commands to pause, continue, or close a run. You can also invoke rollback functionality. You can also start the run process for specific job steps and view trace logs and details for specific run instances.

If you want to narrow your job monitoring to a specific period, use the Job Monitoring by Period component. This component enables you to monitor jobs within a specific period and delve into details about transactions, participants, and plans associated with specific job runs. Because of its versatility and ability to access a wide range of information, this component is a useful productivity tool for compensation administrators. The Monitoring Jobs By Period component provides a convenient link to the Monitoring Jobs component for easy access to the detailed information provided by the Monitor Jobs component. You can also use the Process Monitor component to monitor job status.

See Also

[Chapter 18, “Processing Incentive Transactions,” Monitoring Jobs, page 385](#)

[Chapter 18, “Processing Incentive Transactions,” Monitoring Jobs By Period, page 394](#)

Compensation Administrator Tools

The tasks of compensation administrators frequently include troubleshooting questions and resolving issues received from sales representatives, sales managers, and field operations personnel. The frequency of these tasks vary based on when your organization allocates, credits, and publishes transactions. Sales Incentive Management provides a set of tools to increase the compensation administrators productivity when dealing with these types of tasks. Your compensation administrators can use these tools in conjunction with their knowledge of the compensation plans, policies, and procedures of your organization, to quickly and accurately troubleshoot and resolve issues.

The compensation administrator productivity tools are a comprehensive set of report pages accessible through the following components:

Component	Description of Tools
Monitor Jobs by Period	Displays job runs for a specific period. Use this component to perform rollback for multiple run contexts, merge job runs, view participant data for a job run, and review plan details.
View Participant Details	Displays, for a select participant, run period, and run context, the transactions, draws, variables, and ledger entries associated with the participant. This is the primary path for compensation administrator troubleshooting tasks.

These components consist of view-only inquiry pages. This is a preventative measure to enable many compensation administrators to detect the errors while minimizing risk by maintaining tight control over who can make the changes. These changes can have a widespread effect on plans and plan participants. Your organization can thus have control over who can edit this information.

See Also

[Chapter 18, “Processing Incentive Transactions,” Monitoring Jobs By Period, page 394](#)

[Chapter 18, “Processing Incentive Transactions,” Viewing Participant Details, page 415](#)

Defining Jobs

To define EIM jobs, use the Define Jobs component (EI_PCM_JOBDEFN).

This section discusses how to:

- Create EIM jobs.
- Modify processing steps for job definitions.
- Specify plan processing criteria.
- Select compensation structure criteria.
- Select a plan template.

Pages Used to Define an EIM Job

Page Name	Object Name	Navigation	Usage
Define Jobs	EI_PCM_JOB_DFN	Compensation, Sales Incentives, Calculate Incentives, Define Jobs, Define Jobs	Specify steps and parameters for incentive calculation processing jobs.
Invalid Job Schedule Steps	EI_PCM_SCHDSTPBYJB	The system displays this page whenever a modification to the processing steps on the Define Jobs page render the related job schedule definitions invalid.	Cancel a modification made to the processing steps of a job definition that cause invalid job schedule definitions or continue with the modification and have the system delete the Run From This Step field value from impacted job schedule definitions.
Comp Structure & Plan Criteria	EI_PCM_COMP_SEC	Compensation, Sales Incentives, Calculate Incentives, Define Jobs, Define Jobs Select the Comp Structure & Plan Criteria tab.	Specify steps for a job definition.
Compensation Structure Summary	EI_CSTR_SEARCH	Click the Select a territory tree, node, or individual participant link on the Comp Structure & Plan Criteria page.	Select the compensation structure, node, or participants to process.
Define Jobs - Select Comp Structure Criteria	EI_CSTR_SEARCH	Click the Select a territory tree, node, or individual participant link on the Comp Structure & Plan Criteria page.	Select the compensation structure, specific node, or specific participant on which to base the job definition.
Plan Processing Criteria - Select a Plan Template	EI_PCM_PLNSEL_SEC	Click the Select a Template link on the Comp Structure & Plan Criteria page.	Select the plan template on which to base the job definition.

Creating EIM Jobs

Access the Define Job page.

Define Job **Comp Structure & Plan Criteria**

JOB ID PROD_REP_Y **Business Unit** GBIBU ☒ **System Data**

Product Category Sales Incentive Management **Market Template** High Tech & Industrial

Job Details

***Job Name** Product Rep Annual Bonus [Clone Job](#)

☐ **This job loads data**
☒ **This job processes plans**

Process Steps

Step Order	*Step ID	Step Name	Stop after this step	Workflow ID	Close Step	Prerequisite Step	
10	YRLY_BONUS	Calculate Annual Bonus	<input checked="" type="checkbox"/>		<input type="checkbox"/>		+ -
20	PAYOUT_Y	Create Annual Payout	<input checked="" type="checkbox"/>		<input type="checkbox"/>		+ -
30	POST_Y	Post Annual	<input type="checkbox"/>		<input type="checkbox"/>		+ -
40	BULK_REPL	Bulk Replication	<input type="checkbox"/>		<input type="checkbox"/>		+ -
50	B_PREP_R_F	Bulk Prepare Rpt Full Refresh	<input checked="" type="checkbox"/>		<input type="checkbox"/>		+ -
60	B_REL_R	Bulk Release Report	<input type="checkbox"/>		<input type="checkbox"/>		+ -

Batching Query

*Output/Criteria Name	Description	Target Description	
1			Preview + -

Go to [Schedule Jobs](#) [Monitor Jobs](#)

Define Job page

Use the Define Job page to create an EIM job or modify an existing job. The product category and market template selected for an EIM job determine the incentive plans that the job can process. The job definition is unavailable for edit as long as a job is processing or in queue for processing.

Job Details

- Job Name** Enter a name that describes the job definition.
- This job loads data** Select to indicate that this job loads data. This box is informational-only but can be used to identify jobs that have a certain type.
- This job processes plans** Select to indicate that this job processes plans. This box is informational-only but can be used to identify jobs that have a certain type.

Processing Steps

Select the processing steps for the job definition. You can include the same job step at multiple points in a job if required. For example, you could run a security step after loading data, and then again after calculation. Jobs execute processing steps in sequential order. In the case of a step with a prerequisite step, the system insures that the prerequisite step executes first. Even if the job does not list the prerequisite step, the system automatically executes it.

Certain modifications to processing steps of a job definition impact the validity of job schedule definitions.

See [Chapter 18, "Processing Incentive Transactions," Modifying Processing Steps for Job Definitions, page 376.](#)

Step Order	Enter an order for the steps to be performed. Specifying a new order overrides the default execution order specified for the step. Step order is represented in increments of 10 to facilitate step reordering.
Step ID	Use Query Builder to select a step for the job. If a step you select has a dependency on another step, an error message appears when you save the job definition if the prerequisite step is not included. To remove a prerequisite step, you must first remove the all the steps that require it. Steps are maintained using the Step Definition page under the Define Sales Incentive Options menu.
Multiple Selections	Click this button to select multiple steps from the plan template to include as processing steps for the job definition. The system displays the Query Builder - Results page, where you can select the check boxes corresponding to the steps that you want to include. Alternatively, you can use the Step ID field to select a step and then add a row for each additional step.
Step Name	Displays the step name.
Stop after this step	Select to halt job processing after this step has been processed. The engine always executes an instance of the run only up to the first stop point encountered.
Workflow ID	Select a workflow to associate with this step. When this step is processed, the specified workflow is triggered. The workflow behaves like a stop point.
Close Step	Indicates that the step is the final step in the job definition (read-only). This attribute is maintained on the Step Manager page). To cause a job to close automatically, you must select a close step as the last step in the job definition. Otherwise you can close a job run from the Run Monitor.
Prerequisite Step	Displays the prerequisite step (if any) for the step. Prerequisite steps are determined in the Step Definition component by the Depend on Step field value. The prerequisite step displays on this page if it is not a control step. EI_MASTER launches the prerequisite step automatically. You cannot remove a prerequisite step from a job definition unless you first remove the dependent step.

Batching Query

Expand the Batching Query section to select the job batches. Select as many batch queries as you want for this job. Each batch query must be set up to retrieve a set of transactions from a staging object (the staging objects can be transaction or reference objects). The processing engines use the original class ID stored on the Query Builder object to determine which queries to process.

Output/criteria combination	Specifies output/criteria combination name.
Target Description	Identifies the query target object.
Preview	Launches Query Builder displaying the selected output/criteria combination.

Modifying Processing Steps for Job Definitions

When modifying the processing steps of a job definition on the Define Job page, the system ensures the validity of job schedule definitions that are based on that job definition. If a modification to the processing steps of a job definition cause the start step for a job schedule definition to become invalid, the system displays the Invalid Job Schedule Steps page.

The start step for an existing job schedule definition is the value from the Run From This Step field on the Schedule Jobs page. This field value must be a start step within the corresponding job definition. A start step in the job definition is any processing step that occurs after stop step.

The following are modifications to the job definition that cause scheduling errors:

- Deleting a step that is a start step for existing job schedule definitions.
- Clearing the Stop after this step check box of a step preceding a step that is a start step for existing job schedule definitions.
- Inserting a new step after a stop step without selecting the Stop after this step check box removes the option of using the following step as a start step. And, if that step is used as a start step in a job schedule, the schedule is rendered invalid.

On the Invalid Job Schedule Steps page perform one of these actions:

- Click the Delete button to continue with the modification and delete the invalid start step from existing job schedule definitions. You must then assign a new value in the Run From This Step field to the impacted job schedule definitions on the Job Schedules page.
- Click the Cancel button to return to the Define Job page and readjust the job definition by changing the settings of the Stop after this step check box or the location of processing steps so that the start step for the impacted job schedule definitions remain valid.

Specifying Plan Processing Criteria

Access the Comp Structure & Plan Criteria page.

Define Job

Comp Structure & Plan Criteria

JOB ID

PROD_REP_Y

Business Unit

GBIBU

Product Category

Sales Incentive Management

Market Template

High Tech & Industrial

Plan Processing Criteria

Comp Structure Criteria

Compensation Structure

GBIBU STRUCTURE

Select a territory tree, node, or individual participant

Node

Participant ID

Plan Selection

Plan Template

PSR-IP-T

Product Sales Rep

Select a Template

Calendar ID

00

HT Template Calendar (SIM)

Frequency ID

1

Monthly

☒ Process all plans in template
 ☐ Process only selected plans

Add Plan Processing Steps to Job

Process Steps

Customize

Find

First

1-6 of 6

Last

Comp Structure and Plan Criteria page

Use the Comp Structure & Plan Criteria page to define the job processing scope.

The steps used in a job are defined in your plans, or in the plans and plan templates delivered in the market templates supplied with Sales Incentive Management.

For a selected business unit, product category, and market template, you have the option of selecting an entire compensation (territory) structure, a specific node, or a specific participant. You can select all the plans belonging to a plan template, or only selected plans.

You can have multiple open runs for the same period if they are based on different jobs. For example, you could have one job processing your NorthWest region, one job processing the East region, and a third processing the entire compensation structure.

Comp Structure Criteria

Select a territory tree, node, or individual participant

Click the Select a territory tree, node, or individual participant link and select from the Tree Summary page the compensation structure, node, participant ID, or combination of these. To run the Security (EI_SECUR) Process Scheduler job, you must select a compensation structure.

Plan Selection

Plan Template	Enter a template name or click Select a Template to select a template from which the plan you want to process was derived. To run the EI_SECURE Process Schedule job, you must select a plan template. This also associates a calendar ID with the job and enables it to run successfully.
Process all plans in template	Select this option if you want the job to process all plans derived from the selected template.
Process only selected plans	The system displays the Select specific plans group box so that you can select the specific plans that you want to process from the selected template.
Plan ID	Select the specific plans that you want to process from the template.
View Plan Details	Click this link to access the Plan Definition page, where you can view the plan definition for the selected plan.
Add Plan Processing Steps to Job	Click this button to add the steps in the selected plans to the job definition.

Process Steps

If necessary, review the job definition Processing Steps. The documentation for the Define Job page describes these fields.

See [Chapter 18, “Processing Incentive Transactions,” Creating EIM Jobs, page 373](#).

Selecting Compensation Structure Criteria

Access the Define Jobs - Select Comp Structure Criteria page.

Define Jobs

Select a territory tree, node, or individual participant to process by searching for a specific value or select a value from the list of territory trees below.

Search for

☐ Compensation Structure
 ☐ Specific Node
 ☒ Specific Participant

_____ or _____

Select a Value from Territory

As of

[Expand All](#) [Collapse All](#)

Left | Right

- GBIBU STRUCTURE - GBI US
 - Territory - Eastern Region
 - Territory - Balboa
 - Participant - Field_Product_Reps
 - [Sales Person - Murphy,Terry](#)
 - Participant - Field_Service_Reps
 - [Sales Person - Stone,Tyler](#)
 - Territory - East Coast
 - Territory - New England
 - Territory - New York State
 - Territory - New York City Metro
 - Participant - Service_Reps
 - [Sales Person - Martin,Mandy](#)
 - Participant - Product_Reps
 - [Sales Person - Wong,Benny](#)
 - Participant - Regional_Manager
 - [Sales Person - Parker,Russell](#)
 - Participant - Sales_Manager
 - [Sales Person - DeMarco,Tony](#)
 - Territory - Midwest Region
 - Territory - US200

Context

Compensation Structure GBIBU STRUCTURE

Compensation Node BALBOA

Participant KU0051

Type PERS

Plan ID PSR-IP

Define Jobs - Select Comp Structure Criteria

In the Search for group box, select the type of compensation structure criteria for which you are defining the job definition. Select either the Compensation Structure, Specific Node, or Specific Participant option. The system displays data in the compensation structure tree in at the bottom of the page according to your selection. Click the Search button to access the Query Builder - Results page, where you can select the compensation structure, node, or participant. Or, enter an As of date in the Select a Value from Territory group box to view the compensation structure tree for a specific date. Then expand the branches to find and select the compensation structure, node, or participant and click the link for that data. The system displays the context for that data within the compensation structure. If this is the correct data, click the Select button to select the data and return to the Comp Structure & Plan Criteria page.

Selecting a Plan Template

Access the Plan Processing Criteria - Select a Plan Template page.

Plan Processing Criteria

Select a Plan Template

Select a plan template from the template list. To make a selection based on a plan do a search by "Plan".

Select a Template

Search by
[Search with Query Builder](#)

Product Category Sales Incentive Management
Market Template High Tech & Industrial

Plan Templates List

Customize | Find | View All |
First ◀ 1-5 of 5 ▶ Last

	Select	Plan Template	Template Name	Description	Calendar ID	Frequency ID
1	<input type="button" value="Select"/>	BLANK-IP-T	Incentive Plan	Incentive Plan	00	1
2	<input type="button" value="Select"/>	PSR-IP-T	Product Sales Rep	Product Sales Rep	00	1
3	<input type="button" value="Select"/>	RMGR-IP-T	Regional Manager Sales Plan	Regional Manager Sales Plan	00	1
4	<input type="button" value="Select"/>	SMGR-IP-T	Sales Manager Plan	Sales Manager Plan	00	1
5	<input type="button" value="Select"/>	SSR-IP-T	Service Sales Rep Plan	Service Sales Rep Plan	00	1

[Return to Comp Structure & Plan Criteria](#)

Plan Processing Criteria - Select a Plan Template page

- Search By** Select whether you want to view plan templates in the Plan Template List grid at the bottom of the page by plan template or plans within the plan templates.
- Select** Click this button for the plan or plan template to select the plan template on which you want to base the job definition.
- Search with Query Builder** Select this link to access the Query Builder - Results page, where you can select the plan template or plan through Query Builder rather than through the plan template list.

Cloning Jobs

To clone jobs, use the Clone Job component (EI_PCM_JOB_CLONE).

This section discusses how to clone a job.

Sales Incentive Management enables you to clone a job definition so that you can modify the cloned job instead. You might clone a job to define a job that is only slightly different from an existing one. It is much less work to modify the clone than to start a new job from scratch. This enables you to run the same business process—using, for example, all the same job steps—but on a different compensation structure or a different node, for example, and for a different (or the same) period. A cloned job is identical to the original job except for the Job ID and Description. You can modify any criteria for a cloned job.

Page Used to Clone a Job

Page Name	Object Name	Navigation	Usage
Clone a Job Definition	EI_PCM_JOB_CLONE	Compensation, Sales Incentives, Calculate Incentives, Define Jobs, Define Jobs Click the Clone Job button.	Clone the current job definition.

Cloning a Job

Access the Define Jobs - Clone a Job Definition page.

Define Jobs

Clone a Job Definition

Step 1: Select a Job Definition to Clone

Existing Job Definition

Business Unit GBIBU

JOB ID PROD_REP_Y

Product Category Sales Incentive Management

Market Template High Tech & Industrial

Job Name Product Rep Annual Bonus

Step 2: Specify the attributes of the new Job Definition that you are creating.

New Job Definition

***JOB ID**

***Job Name**

Create **Cancel**

Define Jobs - Clone a Job Definition page

When cloning a job definition, the system pre-loads the source job based on the job currently selected. To clone a job, in the New Job Definition group box, specify the Job ID and Job Name for the new job definition, and then click Create.

Scheduling Jobs

To schedule jobs, use the Schedule Jobs component (EI_PCM_JOB_SCHED).

This section provides an overview of job scheduling and discusses how to schedule a job.

Understanding Job Scheduling

After you create a job, you specify the job scheduling criteria (either basic or advanced) and a processing schedule by using the Schedule Jobs page. The basic criteria enables you to select the period from the run date or from a period, and summarizes the Advanced Criteria selections. Click the Projected Run check box to make the job run a projected run. . Only projected transactions are eligible for processing in projected runs. Projected transactions are not posted to the SIM ledger, nor are payouts created for them. For a single period, you can have one open run and one projected run. Projected runs do not affect the results of any subsequent regular run.

You can also use this page to initiate processing at a specific job step, set up a recurring schedule for this job instance, and view job run status.

Page Used to Schedule a Job

Page Name	Object Name	Navigation	Usage
Schedule Jobs	EI_PCM_RUN_CTRL	Compensation, Sales Incentives, Calculate Incentives, Schedule Jobs, Schedule Jobs	Specify run parameters and processing schedule for a job.

Scheduling a Job

Access the Schedule Jobs page.

Schedule Jobs

Schedule ID 2001 **Business Unit** GBIBU ***JOB ID** PROD_REP_Y

Schedule Job

☒ **Advanced Criteria**

☐ **Projected Run**

Period Selection Criteria

☐ **Select Period from Run Date** [Use Basic/Default Criteria](#)

☒ **Specify Period** **As Of Fiscal Year** 2001 **Period** 12 December 2001

As of Date

☐ **Use Period Begin Date**

☒ **Use Period End Date**

☐ **Use Run Date**

☐ **Specify Date**

Transaction Date Range

☐ **Period Begin to 'As Of Date'**

☐ **Use Period Begin and End Dates**

☒ **Specify Range** **Begin Date** 01/01/2001 **End Date** 12/31/2001

Schedule Jobs page (1 of 2)

Comp Structure As Of Date

☐ Use Transaction Date
☐ Use Run Date
☐ Use Period Begin Date
☒ Use Period End Date
☐ Specify Date

Job Processing Schedule Customize Find First 1 of 1 Last

[Run Now](#) [Run Later](#) [Recurring Schedule](#) [View Run Status](#)

*Run From This Step	Step Order	Trace Rules	Server Name	Logging Level			
YRLY_BONUS	1	Calculate Annual Bonus	<input type="text"/>	Fatal Error	Run Now	+	-

Go to [Define Jobs](#) [Monitor Jobs](#) [Process Monitor](#)

Schedule Jobs page (2 of 2)

Period Selection Criteria

Period Selection Criteria determines how the EIM engine selects the period for which to open the batch. You can specify a period or have the engine determine the period for the batch using the date on which the engine is run.

Advanced Criteria or Use Basic/Default Criteria

Click this link to toggle between basic and advanced criteria selections when scheduling a job. You can use either the Basic Criteria mode or Advanced Criteria mode to make selections for your job schedule. The Basic Criteria mode contains the same Period Selection Criteria options as the Advanced Criteria section, and displays the selections made on the Advanced Criteria section.

Projected Job Run

Select the check box to make this job run a projected run. This check box is available only after you select Advanced Criteria.

Select Period from Run Date

Use the period from the job run date to determine the period for the batch to open.

Specify Period

Enter values in the Fiscal Year and a Period fields to determine the period for the batch to open.

As of Date

The As Of Date options are used by the processing engines. These dates are used as criteria when the system selects which version of reference objects and plans are in effect for the run.

Use Period Begin Date

Use the period begin date of the batch that is opened as the effective date criteria.

Use Period End Date

Use the period end date of the batch that is opened as the effective date criteria.

Use Run Date

Use the run date, which is the date that the engine is invoked, as the effective date criteria.

Specify Date Enter a date to use as the effective date criteria.

Transaction Date Range

The Transaction Date Range options determine how the engine selects the transactions to process in the job.

Period Begin to 'As Of Date' Default option. Process transaction that occurred from the period's begin date to the selected As Of Date.

Use Period Begin and End Dates Process transactions that occurred within the period defined by the specified period's begin and end dates.

Specify Range Enter values in the Begin Date and End Date fields to define the transactions to process.

Comp Structure As of Date

The Comp Structure As Of Date options control how the system determines which version of the compensation structure to process.

Use Transaction Date Use the version of the compensation structure as it existed on the transaction date.

Use Run Date Use the version of the compensation structure as it existed on the date the job was run.

Use Period Begin Date Use the version of the compensation structure as it existed on the period begin date.

Use Period End Date Use the version of the compensation structure as it existed on the period end date.

Specify Date Enter a As of date to specify which version to use.

Job Processing Schedule - Run Now

Run From This Step Select the steps at which the job instance should start.

Step Order Indicates step order.

Trace Rules This field is currently not in use.

Server Name Specify a particular server to run the job. Otherwise, jobs are distributed among several active Process Schedulers from different machines and it is up to PeopleSoft's distributed agent to decide which one will handle the job.

Logging Level Select the level of logging required. Valid selections are *All Errors*, *Debug*, *Fatal Errors*, *Info*, or *Warns*.

Note. It is not recommended to log fatal errors because non-fatal errors (which affect the calculation results) will not be reported.

Run Now Click this button to commence processing for a step.

Job Processing Schedule - Run Later

This area lets you schedule a one time run for a specific Run Date, Run Time, and Time Zone. Click Schedule to save the job run schedule.

Job Processing Schedule - Recurring Schedule

This area enables you to set up a recurring schedule for a job step. For each step select a Recurrence Name. Click Schedule to save the recurring job run schedule.

Job Processing Schedule - View Run Status

This area enables you to view the run status of a job instance. Displays the run status for the selected step, showing the run control ID for the step, the user ID of the person who ran the step, the process run status, process instance, and the begin and end time information of when the process began and completed.

View Trace Log

Click this link for a specific run instance to access the View Trace Log page, where you can view messages that the system generated for a specific job run instance or step instance.

Refresh

Click this button to update the process run status.

Monitoring Jobs

To monitor jobs, use the Define Jobs (EI_PCM_JOBDEFN) and Monitor Jobs (EI_PCM_RUNSTATUS) components.

This section discusses how to:

- View job run history.
- Monitor job status.
- View incentive plans included in a run.
- View step run history.
- View step processing details.
- View run instance details.
- View trace logs.
- Run a specific participant.

Page Used to Monitor Job Status

Page Name	Object Name	Navigation	Usage
Job Run History	EI_PCM_JRUNVW	Compensation, Sales Incentives, Calculate Incentives, Define Jobs, Job Run History, Job Run History	For existing jobs, view all job runs processed for that period.
Monitor Jobs	EI_PCM_RUNSTATUS	Compensation, Sales Incentives, Calculate Incentives, Monitor Jobs, Monitor Jobs	Monitor progress of jobs and initiate continuance of in-process jobs.
Incentive Plans Included in this Run	EI_PCM_RUNPLNS_SEC	Click the View Plan link on the Monitor Jobs page.	View the incentive plans that are included as part of the selected job run.
Step Run History	EI_PCM_STPHIST_SEC	Click the View Step Run History link on the Monitor Jobs page.	View the processing details history for the steps within a job run.
Step Processing Details	EI_PCM_STPENG_SEC	Click the View Details link on the Run Instance Details page.	View the engines called by job steps during processing and associated status.
Monitor Jobs - Run Instance Details	EI_PCM_STPRUN_SEC	Click the View Details link on the Monitor Jobs page.	View details of a run instance.
View Trace Log	EI_SY_TRAC_PG	<ul style="list-style-type: none"> Click the View Trace Log link for a specific run instance on the Monitor Jobs page. Click the View Trace Log link for a specific run instance on the Monitor Jobs - Run Instance Details page. Click the View Trace Log link for a specific run instance on the Step Instance Details page. 	View messages that the system generated for a specific job run instance or step instance.
Process Individual Participants	EI_PCM_RN_PCPN_SEC	Click the Process a Participant link.	Process selected participants.

Viewing Job Run History

The Job Run History page displays all runs generated by the job organized by period.

Access the Job Run History page.

Define Job **Comp Structure & Plan Criteria** **Job Run History**

JOB ID PROD_REP_M **Business Unit** GBIBU

Product Category Sales Incentive Management **Market Template** High Tech & Industrial

Processing Periods [Find](#) | [View All](#) First 1 of 2 Last

Fiscal Year 2001 **Process Period End Date** 04/30/2001 [Rollback Period](#)

***Target Run Context** 556 [Merge Runs](#)

Monitor Jobs by Period [Customize](#) | [Find](#) First 1 of 1 Last

Run Context	Job Run Status	Start Date/Time	End Date/Time	Last Run On	Last Run Step	
1	556 In Process	11/17/2004 1:57PM			ROLLUP	View Run Details

[Go to Process Monitor](#)

Job Run History page

Target Run Context

Use this field when merging two or more runs into a single run. Specify the run context of the target (the run to which you are merging).

Rollback Period

Performs a rollback of all job runs for the specified period.

Merge Runs

Click this link to access the Select and Merge Runs page, where you can take different job runs that initiated for a specific period and that have the same plan template on a compensation structure and merge them into a single job run.

See [Chapter 18, "Processing Incentive Transactions," Merging Job Runs, page 400.](#)

View Run Details

Click this link for a specific run context to access the Monitor jobs page, where you can view details about the job run such as business unit, start time, end time, plan template, compensation structure, node, and process period information. You can also perform the following actions: issue commands to pause, continue, or close a run; invoke rollback functionality; process an individual participant; start a job run from specific processing steps; view trace logs for run instances.

See [Chapter 18, "Processing Incentive Transactions," Monitoring Jobs, page 385.](#)

Monitoring Job Status

Access the Monitor Jobs page.

Monitor Jobs

Job Run Details 525 **JOB ID** PROD_REP_M Product Rep - Monthly **Business Unit** GBIBU ☐ **Projected Run**

Job Run Details

Start Date/Time 09/15/04 1:09PM **End Date/Time**
Plan Template PSR-IP-T Product Sales Rep [View Plans](#)
Comp Structure GBIBU STRUCTURE
Node **Participant ID**
Process Period

Process Period 1 2001 **Period Begin** 01/01/2001 **Period End** 01/31/2001
Calendar ID 00 HT Template Calendar (SIM) **Frequency ID** 1 Monthly

Run Details

Job Run Status In Process **Last Run On**
Last Run Step B_REL_R 14 [Manage Participant Reports](#)

Continue Run Pause Run Rollback batch Close Run

[Process a participant](#)

Monitor Jobs page (1 of 3)

Job Steps							
Customize Find First 1-14 of 14 Last							
Step Order	Step ID	Description	Last Run On	Workflow ID	Stop after this step		
1	PRE-ALLOC	Pre-Allocation	09/15/2004 10:51:03AM		<input type="checkbox"/>	Run Now	View Step Run History
2	ALLOCATE	Allocation	09/15/2004 10:51:52AM		<input type="checkbox"/>	Run Now	View Step Run History
3	POST-ALLOC	Post-Allocation	09/15/2004 10:52:22AM		<input type="checkbox"/>	Run Now	View Step Run History
4	CREDIT	Calculates sales credits	09/15/2004 10:53:30AM		<input type="checkbox"/>	Run Now	View Step Run History
5	ROLLUP	Rollup Transactions	09/15/2004 10:54:33AM		<input checked="" type="checkbox"/>	Run Now	View Step Run History
6	BULK_REPL	Bulk Replication	09/15/2004 10:57:44AM		<input type="checkbox"/>	Run Now	View Step Run History
7	B_PREP_R_F	Bulk Prepare Rpt Full Refresh	09/15/2004 10:58:25AM		<input checked="" type="checkbox"/>	Run Now	View Step Run History
8	COMMISSION	Calculate Monthly Commission	09/15/2004 11:01:10AM		<input type="checkbox"/>	Run Now	View Step Run History
9	NEW_ACCT	Calculate New Accts Incentive	09/15/2004 11:02:08AM		<input checked="" type="checkbox"/>	Run Now	View Step Run History
10	PAYOUT_M	Create Monthly Payouts	09/15/2004 11:35:30AM		<input checked="" type="checkbox"/>	Run Now	View Step Run History
11	BULK_REPL	Bulk Replication	09/15/2004 11:38:38AM		<input type="checkbox"/>	Run Now	View Step Run History
12	B_PREP_R_F	Bulk Prepare Rpt Full Refresh	09/15/2004 11:39:20AM		<input checked="" type="checkbox"/>	Run Now	View Step Run History
13	POST_M	Post Monthly Ledger	09/15/2004 11:46:46AM		<input checked="" type="checkbox"/>	Run Now	View Step Run History
14	B_REL_R	Bulk Release Report	09/15/2004 1:09:44PM		<input type="checkbox"/>	Run Now	View Step Run History

Monitor Jobs page (2 of 3)

Run Instances							
Customize Find First 1-9 of 9 Last							
Run Instance	Job Run Status	Process Instance	Start Date/Time		End Date/Time	Run Control ID	
611	Complete	86	09/15/04 10:49AM	View Trace Log	09/15/04 10:54:59AM	ALLOCATE1000071	View Details
612	Complete	105	09/15/04 10:55AM	View Trace Log	09/15/04 10:58:39AM	525_BULK_REPL_75	View Details
613	Complete	115	09/15/04 10:59AM	View Trace Log	09/15/04 11:02:34AM	525_COMMISSION_76	View Details
614	Error..View Message Log	125	09/15/04 11:03AM	View Trace Log	09/15/04 11:05:25AM	525_PAYOUT_M_77	View Details
615	Error..View Message Log	133	09/15/04 11:21AM	View Trace Log	09/15/04 11:23:17AM	525_PAYOUT_M_78	View Details
616	Complete	140	09/15/04 11:34AM	View Trace Log	09/15/04 11:35:55AM	525_PAYOUT_M_79	View Details
617	Complete	147	09/15/04 11:36AM	View Trace Log	09/15/04 11:39:35AM	525_BULK_REPL_80	View Details
618	Complete	157	09/15/04 11:45AM	View Trace Log	09/15/04 11:46:56AM	525_POST_M_81	View Details
625	Complete	229	09/15/04 1:09PM	View Trace Log	09/15/04 1:10:00PM	525_B_REL_R_87	View Details

Go to [Define Jobs](#) [Schedule Jobs](#) [Process Monitor](#) [Refresh](#)

Monitor Jobs page (3 of 3)

Use the Monitor Jobs page to check and control the run instances of a selected job run for your business unit. You can also use this page to pause, roll back, or close a job run instance.

Rollbacks reset job run steps, states, and data. If you select a full rollback the job run is also rolled back. All the corresponding results data, reporting data, and staging data is removed from the system. Prior runs can be rolled back only if a full rollback is run on the last job run for the period and backwards. There are four types of rollback steps:

- Reporting data.
- Results (transaction data).
- Staging data.
- Full rollback (includes job run data).

You can selectively roll back an open run based on the rollback you select. You should only perform full rollbacks on a closed run.

Use the Manage Participant Reports link to access the Manage Participant Reports page to enable participants to view their sales reports.

General Fields

Projected Run

If you select Advanced Criteria on the Schedule Jobs page, the system displays this check box as selected to indicate that this job run a projected run.

Job Run Details

Review the Job Run Details if required.

Start Date/Time

The time the job run was started.

End Date/Time

The time the job run ended.

Plan Template

The template associated with the job.

View Plans

Click this link to access the Incentive Plans included in this Run page, where you can view a list of all plans associated with the selected run.

Comp Structure	The compensation structure from which the job run data was derived.
Node	The single or branch node of the compensation structure from which the job run data was derived. This field is blank if the entire compensation tree is processed.
Participant ID	Identifies the participant whose data is being processed. This field is blank if an entire tree or tree node is processed.

Process Period

The Process Period section shows period information for the job run instance, such as the begin and end date for the period, and the calendar and frequency associated with the period.

Run Details

Review the job run details. The options you can select depend on the current job run status. For instance, you cannot pause or close a job run that has already completed.

Job Run Status	Indicates status of current job run.
Last Run On	Date when the job was run last.
Last Run Step	The last run step completed for this job run.
Continue Run	Starts from the step following the last run step that executed successfully. This button is unavailable when all the preceding steps have executed at least once. To continue the job from a different point within the steps use the Run Now button instead.
Pause Run	Pause job run at current point of execution. When the job run is paused, the engine pauses the job when the current step is completed and does not process any scheduled requests until the job run is resumed.
Rollback Batch	<p>Invokes Query Builder and displays the rollbacks defined in the system. Select a rollback to perform for the current job run.</p> <p>From the Monitor Jobs page you can only roll back the last run for a period. Only the latest run of a job is eligible for roll back. You can roll back a job (with several runs) multiple times. You start by rolling back the latest job, next the latest remaining one, and so on, until you have rollback to the desired state.</p> <p>You can run rollbacks for an entire period; if you do, all batches for the period are rolled back. Performing a rollback deletes all the job runs for that job for that period. You perform period rollbacks using the Job Run History page.</p>
Close Run	<p>Terminate job run. No further processing is allowed on the job run (except a roll back based on the rules described above).</p> <p>Click to take a snapshot of the results of the job run. Future run instance will be in a different run context and will not affect the snapshot. You can continue calculations (if more transactions became available), but these calculations happen in a different run context.</p> <p>You close a job run if you want to open a new job run for the same period. If all the steps in the job have not been executed, you should perform a full rollback on the run so that you can include the data in the next job run. If you close an incomplete job without rolling back, the staging and results data is not available to the next job run.</p>

Manage Participant Reports

Click this link to access the Manage Participant Reports page, where you can enable participants access to incentive reports.

Process a participant

Click this link to access the Process Individual Participants page, where you can process selected participants.

Job Steps

Review the job steps information.

Run Now

Commence step processing. Run Now begins processing a step only if the prior steps have run.

View Step Run History

Click this link to access the Step Run History page, where you can view processing details for job step runs.

Run Instances

Review the run instances.

Run Instance

System-generated identifier for the run instance. The run instance can show *Pending* if the engine was processing another run instance when this request was entered. You must manually restart this missed instance to resume processing.

The Restart button appears only for pending runs. For a job run instance that is in progress an Abort button is displayed to cancel the currently processing run instance.

Job Run Status

Displays SIM-specific job run-related status messages.

Abort

Select this button to Abort a job instance that is currently in process. This button appears only when the Job Run Status is *In Process*.

View Trace Log

Click this link for a specific run instance to access the View Trace Log page, where you can view messages that the system generated for a specific job run instance or step instance.

Run Control ID

Displays the unique process identifier indicating user and process instance of the Process Control engine. Enables you to find the process instance using the Process Monitor.

View Details

Click this link for a specific run instance to access the Monitor Jobs - Run Instance Details page, where you can view step processing details for the run instance.

Viewing Incentive Plans Included in a Run

Access the Incentive Plans Included in this Run page.

Plans in the selected batch

[Monitor Jobs](#)

Incentive Plans included in this Run

Select specific plans Find  First  1 of 1  Last

Plan ID	Plan Name	View Plan Details
1 PSR-IP	Product Sales Rep Plan	View Plan Details

[Return to Monitor Jobs](#)

Incentive Plans Included in this Run page

Click the View Plan Details link to access the Plan Definition page, where you can view details about the selected plan.

Viewing Step Run History




Access the Monitor Jobs - Step Run History page.

[Monitor Jobs](#)

Step Run History

Business Unit GBIBU **JOB ID** PROD_REP_M Product Rep - Monthly **Batch ID** 525

Step ID PRE-ALLOC Pre-Allocation

Step Run History Customize | Find  First  1 of 1  Last

Run Instance	Step Run Status	Message Description	Process Instance	Start Date/Time	End Date/Time	
1	611 Complete	Ready		09/15/2004 10:51AM	09/15/2004 10:51:03AM	View Details

Monitor Jobs - Step Run History page

View Details

Click this link to access the Step Processing Details page, where you view the engines called by job steps during processing and associated status.

Viewing Step Processing Details




Access the Monitor Jobs - Step Processing Details page.

[Monitor Jobs](#)

Step Processing Details

Step ID PRE-ALLOC Pre-Allocation

Run Instance 611

Customize | Find  First  1 of 1  Last

Engine ID	Engine Run Status	Process Instance		Start Date/Time	End Date/Time
1 EI_PREALLO	Complete	91	View Trace Log	09/15/04 10:51AM	09/15/04 10:51:03AM

Monitor Jobs - Step Processing Details page

View Trace Log

Click this link for a specific run instance to access the View Trace Log page, where you can view messages that the system generated for a specific job run instance or step instance.

Viewing Run Instance Details


Access the Monitor Jobs - Run Instance Details page.

Monitor Jobs

Run Instance Details

Job Run ID	525	JOB ID	PROD_REP_M	Business Unit	GBIBU
Run Instance	616	Start Step	CREDIT	Stop Step	PAYOUT_M

Step Processing Details

CustomizeFind

First1-2 of 2Last

	Step ID		Step Run Status	Process Instance		Start Date/Time	End Date/Time	
1	CONTEXT	Context creation	Complete		View Trace Log	09/15/2004 11:34AM	09/15/2004 11:34:21AM	View Details
2	PAYOUT_M	Create Monthly Payouts	Complete		View Trace Log	09/15/2004 11:34AM	09/15/2004 11:35:30AM	View Details

Monitor Jobs - Run Instance Details page

The Monitor Jobs - Run Instance Details page displays all the steps that were processed in a run instance, including required driver steps that are run automatically by the EIM engine. The status of each step in the run instance is displayed, including the start time and stop time. The process instance number is also listed to enable you to find the process instance using the Process Monitor.

View Trace Log

Click this link for a specific run instance to access the View Trace Log page, where you can view messages that the system generated for a specific job run instance or step instance.

View Details

Click this link to access the Step Processing Details page, where you view the engines called by job steps during processing and associated status.

Viewing Trace Logs

Access the View Trace Log page.

View Trace Log			
Process Instance	140	<input type="checkbox"/> High Severity Only	<input type="checkbox"/> Sort By Message Number
Max Rows 100			
1-3 of 3			
Msg Seq	Severity	Message	Data
1070003	0	Start of EIM main control process. (2901,1)	
1070009	0	Successfully generated run instance 616.0. (2901,514)	
1070018	0	End of EIM main control process. (2901,2)	

View Trace Log page

High Severity Only

Select this check box to display only high severity messages in the View Trace File grid.

Sort By Message Number

Select this check box to display similar messages together in the View Trace File grid from lowest message number to highest message number.

Max Rows (maximum rows) Enter the maximum number of rows to display in the View Trace File grid. The system by default sets the maximum number of rows to 100.

Running a Specific Participant

Access the Process Individual Participants page.

Monitor Jobs

Process Individual Participants

Job Run ID 525

Process a Participant

Select ParticipantView Run Status

	Participant ID	Plan ID	Tree Name	Tree Node	Last Run Step	Continue from Step	Stop Step		
1	KU0056	PSR-IP	GBIBU STRUCTURE	SAN_DIEGO	B_REL_R		ROLLUP	+	-
2	KU0051	PSR-IP	GBIBU STRUCTURE	BALBOA	B_REL_R		ROLLUP	+	-

Return to Monitor Jobs

Run All

Process Individual Participants page

The Process Individual Participants page enables you to run a selected participant through your incentive calculation process aside from the other participants in your working set. For example, you might run a participant separately to create a final payout for an employee who has been terminated.

The Process Individual Participants displays the last step that was processed for the participant, the next step to continue from, and where the job run instance. Click Continue to process the participant.

Clicking Run or Run All processes the selected participants through the job steps until the next defined Stop step, at which point you must start processing for the run participants again. You can schedule multiple participants to be processed like this, using the Run All button.

Running a participant does not affect the usual processing of the batch of which the participant was a member. Because the transactions associated with the run participant are posted when the run participant processing ends, the participant is not processed again when you start the job run he or she belonged to.

Warning! There can be negative side effects from running an individual participant separately from the rest of the team. For example, if a bonus is calculated based on the team’s total sales, then running a job for a single participant will not factor in the contributions from other team members. This could reduce the bonus for the single participant.

- Run

Run the job for the selected participant.
- Run All

Run the job for all selected participants.

Monitoring Jobs By Period

To monitor jobs by period, use the Monitor Jobs by Period (EI_PCM_PRDJB_CMP) component. You can also use this component to access the following components: EI_SY_BAT_CTX_MCMP, EI_SY_BAT_CTX_MCMP, EI_CSTR_AUDIT, and EI_SY_BAT_CTX_CMP.

This section discusses how to:

- View job runs for a period.
- View run instance details.
- Perform rollbacks for run contexts.
- Merging job runs.
- View participant data for a job run.
- View claimed stage transactions for a job run.
- View run criteria for a job run.
- View a compensation structure summary.
- View a participant's transaction processing summary.
- View a participant's variable summary.
- View a participant's ledger summary.

Pages Used to Monitor Jobs By Period

Page Name	Object Name	Navigation	Usage
Monitor Jobs by Period	EI_PCM_PRDJB_PG	Compensation, Sales Incentives, Calculate Incentives, Monitor Jobs by Period, Monitor Jobs by Period	View details about all job runs within a period for a specific business unit and fiscal year. When accessing this page, compensation administrators must know enough information to determine which period and job run is applicable to the research they are performing.
Monitor Jobs by Period - Run Instance Details	EI_PCM_STPRUN_DET	Click the View Trace button on the Monitor Jobs by Period page.	View messages that the system generated for each step within the job run instance.
Rollback Selected Run Contexts	EI_PCM_PRCRQST	On the Monitor Jobs by Period page, select the check box next to the run context and click the Rollback button. On the Results page of the Query Builder, click the OK button.	Execute the rollback of the selected step for the selected run contexts.
Select and Merge Runs	EI_PCM_MERGERUN	Click the Merge Runs link on the Monitor Jobs by Period page.	Merge, into a single job run of your choice, different job runs initiated for a specific period and plan template on a compensation structure.

Page Name	Object Name	Navigation	Usage
Participant Data	EI_SY_BAT_MAIN	Click the Job Details link on the Monitor Jobs by Period page.	View participants, rollups, and configuration plan aggregator variables in the context of a specific job run.
Claimed Stage Transactions	EI_SY_BAT_ALLOCTXN	Click the Job Details link on the Monitor Jobs by Period page. Select the Claimed Stage Transactions tab.	View all staged transactions that were claimed in the context of a specific job run.
View Run Criteria	EI_SY_BAT_RC_SEC	Click the View Run Criteria link on the Participant Data page.	View details about dates associated with the job run according to the job context and period context of the run.
Compensation Structure Allocation Details	EI_CSTR_AUDIT	Click the tree node link for the participant on the Participant Data page.	View summary information about the compensation structure to which the participant is assigned, such as tree structure and allocation details. View these details as of a specific date.
Participant Data - Transaction Processing Summary	EI_SY_BAT_CTX_PG	Click the Details link for a participant on the Participant Data page.	View a participant's source transaction details in the context of the job run, period, tree node, and plan.
Participant Data - Participant Variables Summary	EI_SY_BAT_CTXVR_PG	Click the Details link for a participant on the Participant Data page.	View a summary of the variables that are included in the compensation plan for the specified participant, run context, and period. The system displays the values associated with each of these variables.
Participant Data - Participant Ledger Summary	EI_SY_BAT_LDGR_PG	Click the Details link for a participant on the Participant Data page.	View a summary of ledger details for the participant according to the compensation plan, run context, and period. The system displays the values associated with payout, such as currency, amounts, ledger type, and date posted.

Page Name	Object Name	Navigation	Usage
Plan Rules	EI_SY_BAT_PLN_PG	Click the Plan ID link for the participant on the Participant Data page.	Review and interpret plan rule details for the sections and steps of an incentive or configuration plan as of a specific date to ensure accuracy and completeness. See Chapter 16, “Defining Plans,” Viewing Plan Summaries, page 353.
Variables	EI_SY_BAT_PLN_V_PG	Click the Plan ID link for the participant on the Participant Data page. Then click the Variables tab.	Review a list of all variables associated with an incentive or configuration plan for a specific date. The system displays details about the variables such as the variable name, description, plan IDs, and shared variable name, frequency, and initial value. See Chapter 16, “Defining Plans,” Viewing Plan Summaries, page 353.
<Variable Name> Details	EI_SY_PLV_PVAC_SEC	Click the Details button on the Variable page for a selected variable.	View the definition details of a selected variable of the plan.
Maintain Overrides	EI_PLAN_OVRIDE	<ul style="list-style-type: none"> Select the View/Create Override Plan button on the Plan Rules page. Select the View/Create Override Plan button on the Plan Usage page. 	Add, edit, or cancel an override for a participant. See Chapter 16, “Defining Plans,” Viewing Plan Summaries, page 353.

Viewing Job Runs for a Period

Access the Monitor Jobs by Period page.

Monitor Jobs by Period

Business Unit HTI89Fiscal Year 2004Period 1Period Begin 01/01/2004Period End 01/31/2004

Process Control Monitor

CustomizeFind

First1-3 of 3Last

	Run Context	Run Status	Run Monitor	Job Details	JOB ID	Plan Template	Tree Name	Last Run Instance	Start Date/Time	Instance Status	View Trace
<input type="checkbox"/>	1	552 In Process	Run Monitor	Job Details	PSR_P189	PSR-IPT89	HTI89	667	11/06/2004 7:29PM	Complete	View Trace
<input type="checkbox"/>	2	553 In Process	Run Monitor	Job Details	SSR_P189	SSR-IPT89	HTI89	668	11/06/2004 7:40PM	Complete	View Trace
<input type="checkbox"/>	3	554 In Process	Run Monitor	Job Details	SMG_P189	SMG-IPT89	HTI89	669	11/06/2004 7:54PM	Complete	View Trace

RollbackMerge RunsRefresh

[Process Monitor](#)

Monitor Jobs by Period page

Run Monitor

Click this link for a specific job run to access the Monitor jobs page, where you can view details about the job run such as business unit, start time,

end time, plan template, compensation structure, node, and process period information. You can also perform the following actions: issue commands to pause, continue, or close a run; invoke rollback functionality; process an individual participant; start a job run from specific processing steps; view trace logs for run instances.

See [Chapter 18, “Processing Incentive Transactions,” Monitoring Jobs, page 385](#).

Job Details

Click this link for a specific job run to access the Participant Data page, where you can view lists of all of the participants and claimed stage transactions associated with the job run.

See [Chapter 18, “Processing Incentive Transactions,” Viewing Participant Data for a Job Run, page 401](#).

View Trace

Click this button to access the Monitor Jobs by Period - Run Instance Details page, where you can view messages for each step within the job run instance.

See [Chapter 18, “Processing Incentive Transactions,” Viewing Run Instance Details, page 398](#).

Rollback

Select the check box next to the run context for which you want to perform a rollback and click the Rollback button. The system displays the Results page of the Query Builder, where you can select the step of the run instances for which you want to perform the rollback.

See [Chapter 18, “Processing Incentive Transactions,” Performing Rollbacks for Run Contexts, page 399](#).

Merge Runs

Click this link to access the Select and Merge Runs page, where you can take different job runs initiated for a specific period and plan template on a compensation structure and merge then into a single job run.

See [Chapter 18, “Processing Incentive Transactions,” Merging Job Runs, page 400](#).

Refresh

Click this button to refresh the page display.

Process Monitor

Click this link to access the Process Monitor component of the Process Scheduler, where you can access run details for any process instance that has been executed through the Process Scheduler.

Viewing Run Instance Details

Access the Monitor Jobs by Period - Run Instance Details page.

Monitor Jobs by Period
Run Instance Details
 Left | Right

View Trace File

Run Instance 672 Instance 124 Max Rows 100 Refresh Trace

Step ID Engine ID ☐ High Severity Only ☐ Sort By Message Number

1-2 of 2

Msg Seq	Severity	Message	Data
1	10	Replication: Begin bulk replication process (2901,615)	
2	10	Replication: End bulk replication process (2901,615)	

Return

Monitor Jobs by Period - Run Instance Details page

The system displays in the left menu if the page all of the steps associated with the run instance, along with engine runs associated with each step. Click a link to display the messages for that step in the View Trace File grid to the right.

View Trace File

Sort By Message Number Select this check box to display messages in the View Trace File grid from lowest message number to highest message number.

High Severity Only Select this check box to display only high severity messages in the View Trace File grid.

Max Rows (maximum rows) Enter the maximum number of rows to display in the View Trace File grid. The system by default sets the maximum number of rows to 100.

Return Click this button to return to the Monitor Jobs by Period page.




Performing Rollbacks for Run Contexts

Access the Rollback Selected Run Contexts page.

Monitor Jobs by Period

Rollback Selected Run Contexts

Selected Step ROLLBK_ALL

Process Control Monitor [Customize](#) | [Find](#) |  First  1 of 1  Last

Run Context	Run Status	JOB ID	Plan Template	Last Run Instance	Instance Status
1	555 In Process	PROD_REP_M	PSR-IP-T		672 Complete

[OK](#)

[Cancel and Return to Monitor Jobs By Period](#)

Rollback Selected Run Contexts page

Click the OK button to execute the rollback of the selected step for the selected run contexts. Click the Cancel link to return to the Monitor Jobs by Period page.

To select the run context and steps for which you want to perform a rollback, you must first access the Monitor Jobs by Period page. Select the check box next to the run context for which you want to perform a rollback and click the Rollback button. The system displays the Results page of the Query Builder. Select the Select button for the step within the run instances for which you want to perform the rollback.

Note. Rollbacks have dependencies that require you to run them in multiples.

Merging Job Runs




Access the Select and Merge Runs page.

Select and Merge Runs

Business Unit BU100 **Period context** 463

***Tree Name** CS100 ***Plan Template** TMPLT100

***Merge Target Job** JOB100 ***Target Run Context** 596

Select Runs to Merge [Customize](#) | [Find](#) |  First  1 of 1  Last

	Run Context	Job Run Status	JOB ID	Fiscal Year	Period Begin	Period End	Node	Participant
<input type="checkbox"/>	1	596 In Process	JOB100	2003	01/01/2003	01/31/2003		

[Confirm Merge](#)

[Return to Job Runs By Period](#) [Process Monitor](#)

Select and Merge Runs page

Use the Tree Name, Merge Target Job, Plan Template, and Target Run Context fields to search for and narrow the list of run contexts. The system displays all run contexts that meet these criteria in the Select Runs to Merge grid. If you have accessed this page from the Monitor Jobs by Period page by selected multiple run contexts on that page and clicking the Merge Runs link, the system automatically displays those run contexts in the grid. From the list, select the check boxes to the left of each of the run contexts that you want to merge. Click the Confirm Merge button to perform the merge of the run contexts.

Warning! The user that performs the merge is expected to make the judgment on which runs can be merged based on the business needs of your organization and the compatibility of the runs.

Viewing Participant Data for a Job Run

Access the Participant Data page.

Participant Data

Claimed Stage Transactions

Participant Data

Job Run ID 555

Period Begin 01/01/2001

Period End 01/31/2001

Last Run Step BULK_REPL

Tree Name GBIBU STRUCTURE

[Monitor Jobs](#)
[View Run Criteria](#)

	Transaction State	Count
110	Held for Shipment	2
500	Ready for Posting	43
600	Complete	16

Participants in this run

Customize | Find | View All |

First 1-11 of 11 Last

	Participant ID	Participant Name	Tree Node	Plan ID	Context	Description	
1	KU0051	Murphy,Terry	BALBOA	PSR-IP	10024317	Complete:3 Ready for Posting:9....	Details
2	KUI030	Houseman,Jerry	BAY AREA	PSR-IP	10024333	Ready for Posting:1	Details
3	KUI003	Dacio,Margaret	CENTRAL US200	PSR-IP	10024350	Ready for Posting:1	Details
4	KUI013	Maaks,Danielle	CENTRAL US300	PSR-IP	10024369	Ready for Posting:1	Details
5	KU0064	Wong,Benny	EAST COAST	PSR-IP	10024388	Ready for Posting:1	Details
6	KU0095	Patel,Samish	LOS ANGELES	PSR-IP	10024439	Ready for Posting:3 Held for S....	Details
7	KUI009	Vandernoot,Dirk	NORTHERN CA	PSR-IP	10024484	Complete:8 Ready for Posting:1....	Details
8	KU0121	Fields,Julia	SACRAMENTO	PSR-IP	10024501	Complete:3 Ready for Posting:7....	Details
9	KU0056	Ng,Edward	SAN DIEGO	PSR-IP	10024517	Complete:2 Ready for Posting:3....	Details
10	KU0087	Lopez,Wilma	SOUTHERN CA	PSR-IP	10024533	Ready for Posting:1	Details
11	1001	Ash,Alex	WESTERN	PSR-IP	10024610	Ready for Posting:1	Details

Participant Data page (1 of 2)

Rollups created from this Run					
	Participant ID	Participant Name	Tree Node	Plan ID	Context
1	KU0137	DeMarco,Tony	EASTERN	SMGR-IP	10024404 Details
2	KUTR04	Jeffries,Anne	WESTERN	SMGR-IP	10024551 Details
3	KUI009	Vandernoot,Dirk	WESTERN	SMGR-IP	10024609 Details

Configuration Plan Aggregator Variables set by this Run					
	Tree Node	Plan ID	Variable ID	Description	Total Context
	BALBOA	TERR-CP	505995	New Accounts Attainment	1.0000000000000000 10024320
	BALBOA	TERR-CP	505996	New Accounts Attainment	1.0000000000000000 10024320
	BALBOA	TERR-CP	505996	Acs	
	BAY_AREA	TERR-CP	505996	New Accounts Attainment	1.0000000000000000 10024336
	BAY_AREA	TERR-CP	505996	Acs	
	CENTRAL US200	TERR-CP	505996	New Accounts Attainment	1.0000000000000000 10024353
	CENTRAL US200	TERR-CP	505996	Acs	
	CENTRAL US300	TERR-CP	505996	New Accounts Attainment	1.0000000000000000 10024372
	CENTRAL US300	TERR-CP	505996	Acs	
	EAST COAST	TERR-CP	505996	New Accounts Attainment	1.0000000000000000 10024390
	EAST COAST	TERR-CP	505996	Acs	
	LOS_ANGELES	TERR-CP	505996	New Accounts Attainment	1.0000000000000000 10024442
	LOS_ANGELES	TERR-CP	505996	Acs	
	NORTHERN_CA	TERR-CP	505996	New Accounts Attainment	1.0000000000000000 10024487
	NORTHERN_CA	TERR-CP	505996	Acs	
	SACRAMENTO	TERR-CP	505996	New Accounts Attainment	1.0000000000000000 10024504
	SACRAMENTO	TERR-CP	505996	Acs	
	SAN_DIEGO	TERR-CP	505995	New Accounts Attainment	1.0000000000000000 10024520
	SAN_DIEGO	TERR-CP	505996	New Accounts Attainment	1.0000000000000000 10024520
	SAN_DIEGO	TERR-CP	505996	Acs	
	SOUTHERN_CA	TERR-CP	505996	New Accounts Attainment	1.0000000000000000 10024536
	SOUTHERN_CA	TERR-CP	505996	Acs	
	WESTERN	TERR-CP	505996	New Accounts Attainment	1.0000000000000000 10024553
	WESTERN	TERR-CP	505996	Acs	

Refresh

Participant Data page (2 of 2)

Monitor Jobs

Click this link to access the Monitor jobs page, where you can view details about the job run such as business unit, start time, end time, plan template, compensation structure, node, and process period information. You can also perform the following actions: issue commands to pause, continue, or close a run; invoke rollback functionality; process an individual participant; start a job run from specific processing steps; view trace logs for run instances.

See [Chapter 18, “Processing Incentive Transactions,” Monitoring Jobs, page 385.](#)

View Run Criteria

Click this link to access the View Run Criteria page, where you can details about dates associated with the job run according to the job context and period context of the run.

Transaction State

The page lists summary information for all of the applicable transaction level statuses.

Participant ID

Click the link for the participant’s ID to access the Maintain Sales Person page, where you can update data about the participant.

Tree Node

Click the tree node link for a specific participant to access the <Participant Name> page, where you can view summary information about the compensation structure such as tree structure and allocation details.

Plan ID

Click the plan name link for a specific participant to access the Plan Rules page, where you can view a summary of transaction allocation rules, steps, sections, variables, and overrides for the plan according to a specific date.

Details

Click this link for a specific participant to view all transaction details associated with the participant according to the run context, period, tree node, and plan.

Viewing Claimed Stage Transactions for a Job Run

Access the Claimed Stage Transactions page.

Participant Data
Claimed Stage Transactions

Claimed Stage Transactions

Job Run ID 555 **Period Begin** 01/01/2001 **Period End** 01/31/2001
Last Run Step BULK_REPL **Tree Name** GBIBU STRUCTURE
[Monitor Jobs](#) [View Run Criteria](#)

Stage Transactions by State

	Description	Processing Status	Count
1	Staging Order Transaction	Complete	31

Stage Transactions

Customize | Find | View All |

First ◀ 1-20 of 31 ▶ Last

	EIM Key	Stage ID	Tree Name	As Of Date	Run State
1	H1	1	GBIBU STRUCTURE	01/31/2001	Ready
2	H10	1	GBIBU STRUCTURE	01/31/2001	Ready
3	H12	1	GBIBU STRUCTURE	01/31/2001	Ready
4	H13	1	GBIBU STRUCTURE	01/31/2001	Ready
5	H14	1	GBIBU STRUCTURE	01/31/2001	Ready
6	H16	1	GBIBU STRUCTURE	01/31/2001	Ready
7	H17	1	GBIBU STRUCTURE	01/31/2001	Ready

Claimed Stage Transactions page (1 of 2)

8 H18	1 GBIBU STRUCTURE	01/31/2001	Ready
9 H19	1 GBIBU STRUCTURE	01/31/2001	Ready
10 H2	1 GBIBU STRUCTURE	01/31/2001	Ready
11 H20	1 GBIBU STRUCTURE	01/31/2001	Ready
12 H21	1 GBIBU STRUCTURE	01/31/2001	Ready
13 H22	1 GBIBU STRUCTURE	01/31/2001	Ready
14 H23	1 GBIBU STRUCTURE	01/31/2001	Ready
15 H24	1 GBIBU STRUCTURE	01/31/2001	Ready
16 H25	1 GBIBU STRUCTURE	01/31/2001	Ready
17 H26	1 GBIBU STRUCTURE	01/31/2001	Ready
18 H33	1 GBIBU STRUCTURE	01/31/2001	Ready
19 H35	1 GBIBU STRUCTURE	01/31/2001	Ready
20 H36	1 GBIBU STRUCTURE	01/31/2001	Ready

Refresh

Claimed Stage Transactions page (2 of 2)

Staging <Transaction Type> Transaction

Click this link to create an ad-hoc query through Query Builder to obtain more specific results stage transaction results. When you click this link, the system displays the Query Builder – Results page, which lists all of the transactions in the staged transactions in the job run. Use the component to create the ad-hoc query.

Processing Status

The system displays staged transactions summary information for processing statuses of *Complete*, *Processing*, and *Ready*.

Viewing Run Criteria for a Job Run

Access the View Run Criteria page.

View Run Criteria

Run Context 555	Period context 456	Period Name January 2001	
------------------------	---------------------------	---------------------------------	--

Schedule ID JAN2001	Calendar ID 00	Frequency ID 1
Period Selection Criteria Specify	Period Begin 01/01/2001	Period End 01/31/2001
Fiscal Year 2001	Begin Date 01/01/2001	End Date 01/31/2001
Period 1	As of Date 01/31/2001	Criteria Date 01/31/2001
As of Date Selection Criteria Use Period End Date		
Transaction Date Range Use Period Begin and End Dates		
Comp Structure Criteria Use Period End Date		

Return

View Run Criteria page

Viewing a Compensation Structure Summary

Access the Compensation Structure Allocation Details page.

Compensation Structure Allocation Details

Murphy, Terry
[Go to Maintain Participant](#)

Compensation Structure GBIBU STRUCTURE
Compensation Node BALBOA
Plan ID PSR-IP
Participant ID KU0051
Business Unit GBIBU
As of 01/31/2001

Left | Right

- KU0051 - Show all Configuration Plans
 - GBIBU STRUCTURE - GBI US
 - EASTERN - Eastern Region
 - BALBOA - Participant's Current Node**
 - Participant - Field_Product_Reps
 - Participant - Field_Service_Reps
 - Reference Assoc - ZIPCODES
 - Configuration Plan - ZIPCODE_ALLOC
 - Reference Assoc - PRODUCTS
 - Reference Assoc - SERVICES
 - Configuration Plan - TERR_VARS

Allocation and Config Plans

Node Name		Allocation Rule
BALBOA	PSR-IP	AND(RawOrderTransaction.PROD_EIM_KEY ISIN Product["PRODUCTS"].EIM_KEY,OR (RawOrderTransaction.TRANSACTION_TYPE ="ORD",RawOrderTransaction.TRANSACTION_TYPE ="SHP",RawOrderTransaction.TRANSACTION_TYPE ="ADJ"))
BALBOA	TERR-CP	
BALBOA	ZIPCD-CP	RawOrderTransaction.Sold_To_Postal IsIn NumericRange["ZIPCODES"]

[Cancel](#)

Compensation Structure Allocation Details page

The system displays incentive plan transaction allocation rule details for the selected participant's compensation structure node as of the period end date of the job run.

Viewing a Participant's Transaction Processing Summary

Access the Participant Data - Transaction Processing Summary page.

Transactions

Variables

Ledger Entries

Transaction Processing Summary

Run Context

555

Period Begin

01/01/2001

Period End

01/31/2001

Last Run Step

BULK_REPL

Participant ID

[KU0056](#)

Ng,Edward

Context

10024517

Tree Name

GBIBU STRUCTURE

Tree Node

[SAN DIEGO](#)

Plan ID

[PSR-IP](#)

	Transaction State	Count
500	Ready for Posting	3
600	Complete	2

Type	Run State	Count
1 Orders	Ready	4
2 Payout Transaction	Ready	1

Production Transactions

Customize | Find | View All |

First Last

	EIM Key	Stage ID	Allocate ID	Claim ID	Parent Claim ID	As Of Date	Description	Status	Modified By UI	Added By UI Flag
1	6067	1	1	0	0	01/31/2001			<input type="checkbox"/>	<input type="checkbox"/>
2	H10	1	7987	0	0	01/31/2001			<input type="checkbox"/>	<input type="checkbox"/>
3	H10	1	7987	7995	0	01/31/2001			<input type="checkbox"/>	<input type="checkbox"/>
4	H10	1	7987	7996	0	01/31/2001			<input type="checkbox"/>	<input type="checkbox"/>
5	H33	1	8003	0	0	01/31/2001			<input type="checkbox"/>	<input type="checkbox"/>

Cancel

Participant Data - Transaction Processing Summary page

General Fields

General information, such as participant ID, plan ID, and so on appears on the Working Set tab.

Participant ID

Click the link for the participant's ID to access the Maintain Sales Person page, where you can update data about the participant.

Tree Node

Click the tree node link for a specific participant to access the <Participant Name> page, where you can view summary information about the compensation structure such as tree structure and allocation details.

Plan ID

Click the plan name link for a specific participant to access the Plan Rules page, where you can view a summary of transaction allocation rules, steps, sections, variables, and overrides for the plan according to a specific date.

Transaction State/Count

This group box displays a high-level summary of the transactions in the Production Transactions grid by transaction state, showing the transaction states found in the grid and the count for each of these transaction states. With this summary information, you can then look in the grid for details about the production transactions in a specific transaction state.

Transactions by State

This group box displays a high-level summary of the transactions in the Production Transactions grid by transaction type and run state, showing the count for each transaction type and run state combination found in the grid. With this summary information, you can then look in the grid for details about the production transactions by transaction type that are in a specific run state. Click the <Transaction Type> link to access the Query Builder - Results page, where you can create an change the query to find different search results.

Production Transactions

Use the various tabs in this group box to view transaction and compensation information unique to the participant for the given run context.

Note. Your compensation administrator or IT administrator should customize these tabs based on the type of research applicable to your organization's business needs.

Edit/View Transaction	Click this button to access the production table page where you can update the transaction. The page that the system displays depends on the type of transaction. For example, if the transaction is an order, the system displays the Update Order Transactions page, where you can edit the order transaction details.
Show All Columns	Click this button to view at once all of the source transaction information, rather than navigating through the tabs for the information.

Production Transactions - Details Tab

Click this tab to view details about all exploded transactions. The delivered columns for this tab include date and status of the transaction, the parent claim ID, whether the transaction was added or modified through the user interface page, and a data/time stamp.

Production Transactions - Allocations Tab

Click this tab to view allocated values and corresponding dates for the transactions. The delivered columns for this tab include the date the transaction was allocated, the amount allocated, the currency or unit of measure, and the base amount.

Production Transactions - Credits Tab

Click this tab to view credited values and corresponding dates for the transactions. The delivered columns for this tab include the amount credited, the currency code or unit of measure, and the date credited.

Production Transactions - Compensation Tab

Click this tab to view compensation values and corresponding dates for the transactions. The delivered columns for this tab include compensation amount, currency code or unit of measure, and date compensated.

Production Transactions - Payments Tab

Click this tab to view payment amounts, currency, payout dates, bonuses, and commission codes for the transactions. The delivered columns for this tab include payment amount, currency code or unit of measure, payout date, and payment code.

Production Transactions - Status Tab

Click this tab to view all flag fields related to the transactions. The delivered columns for this tab include the run state, batch control, and approval status fields, plus the following flags: projected, date hold, published, approval, and posted.

Production Transactions - Process Tab

Click this tab to view the process instance, processing action and status, and any message sequence related to the process instance. The system populates these fields for a transaction only if process instance rules exist in the compensation plan.

Viewing a Participant's Variable Summary

Access the Participant Data - Participant Variables Summary page.

Transactions
Variables
Ledger Entries

Participant Variables Summary

Run Context 555 **Period Begin** 01/01/2001 **Period End** 01/31/2001 **Last Run Step** BULK_REPL

Participant ID KU0056 Ng,Edward **Context** 10024517

Tree Name GBIBU STRUCTURE **Tree Node** SAN DIEGO **Plan ID** PSR-IP

Aggregator Variables Summary

	Variable ID	Variable Name	Description	Access ID	Fiscal Year	Period	Total
1	505722	NEW_ACCTS_ATTAIN_ACS	New Accounts Attainment Acs	506006	2001	1	1.0000000000000000
2	505726	PROD_REV_ATTAIN	Product Revenue Attainment		2001	1	1,000,000.0000000000000000
3	505727	PROD_REV_ATTAIN_ACS	Product Revenue Attainment Acs	505737	2001	1	1,000,000.0000000000000000

Numeric Variables Summary

	Variable ID	Variable Name	Description	Access ID	Fiscal Year	Period	Total
1	505725	NEW_ACCTS_PAYOUT_MTHLY	Monthly New Accounts Payout		2001	1	100.0000000000000000
2	505728	PROD_REV_ATTAIN_PCT_YTD	Product Rev Attainment % YTD		2001	1	133.3333333333333000
3	505730	PROD_REV_QUOTA_ACS	Product Revenue Quota Acs	505738	2001	1	750,000.0000000000000000

Cancel

Participant Data - Participant Variables Summary page

Viewing a Participant's Ledger Summary

Access the Participant Ledger Summary page.

Transactions
Variables
Ledger Entries

Participant Ledger Summary

Run Context 555 **Period Begin** 01/01/2001 **Period End** 01/31/2001 **Last Run Step** BULK_REPL

Participant ID KU0056 Ng,Edward **Context** 10024517

Tree Name GBIBU STRUCTURE **Tree Node** SAN DIEGO **Plan ID** PSR-IP

	Payout Amount	Payout UOM	Payment Currency	Base Monetary Amount	Base Currency	Ledger Entry Type	Payment Code	Class ID	As Of Date	Date Posted	Sequence	Fiscal Year	Accounting Period
1	100.00		USD	100.00	USD	Accrual	BONUS	LDGR	11/10/2004		1	2001	1
2	14437.50		USD	14437.50	USD	Accrual	COM1	LDGR	11/10/2004		1	2001	1

Cancel

Participant Ledger Summary page

Managing Payment Processing

To monitor payments, use the Monitor Payments component (EI_PMT_MSG_MONITOR).

This section provides overviews of the payment system interface and payment message processing and discusses how to monitor payment messages.

See Also

Chapter 3, “Defining Sales Incentive Management General Options,” Setting Up the Payment System Interface, page 65

Understanding the Payment System Interface

The payment system interface enables a bidirectional data exchange between PeopleSoft SIM and an external payroll system such as PeopleSoft Payroll for North America. This interface enables you to configure how payment data will be exchanged between SIM and the payroll system. The SIM system publishes messages that contain payout information such as the amount to be paid or adjusted. The messages contain all data elements that each system needs to identify the payment period and desired payment date. The payroll system subscribes to these messages and processes the payout data according to its business processes and then publishes a confirmation message. PeopleSoft SIM then subscribes to the payment results.

Compensation administrators can use a message monitoring component to manage the ongoing exchange of data and review the messages that pass between the systems.

Here is a list of each step in the payroll interaction process:

1. Define a payment system.

See Chapter 3, “Defining Sales Incentive Management General Options,” Configuring the Payment System Interface, page 66.

2. Define SIM payment codes.

See Chapter 3, “Defining Sales Incentive Management General Options,” Setting Up Payment Codes, page 67.

3. Define target system payment codes.

This step occurs in PeopleTools, where you create a table to hold payment code values. If you use PeopleSoft Payroll for North America, you do not have to set up a table, you point to existing payroll codes you want to use in your interface. If you use any other payroll system, you must create the table and populate it with payout codes and descriptions.

4. Map payment codes.

See Chapter 3, “Defining Sales Incentive Management General Options,” Mapping Payment Codes, page 68.

5. Assign an emplID and payment system to participants.

See Chapter 10, “Managing Reference and Participant Objects,” Managing Sales Participants, page 214.

6. Run the payout job step.

7. (Optional) Create, update, or reassign payout transactions.

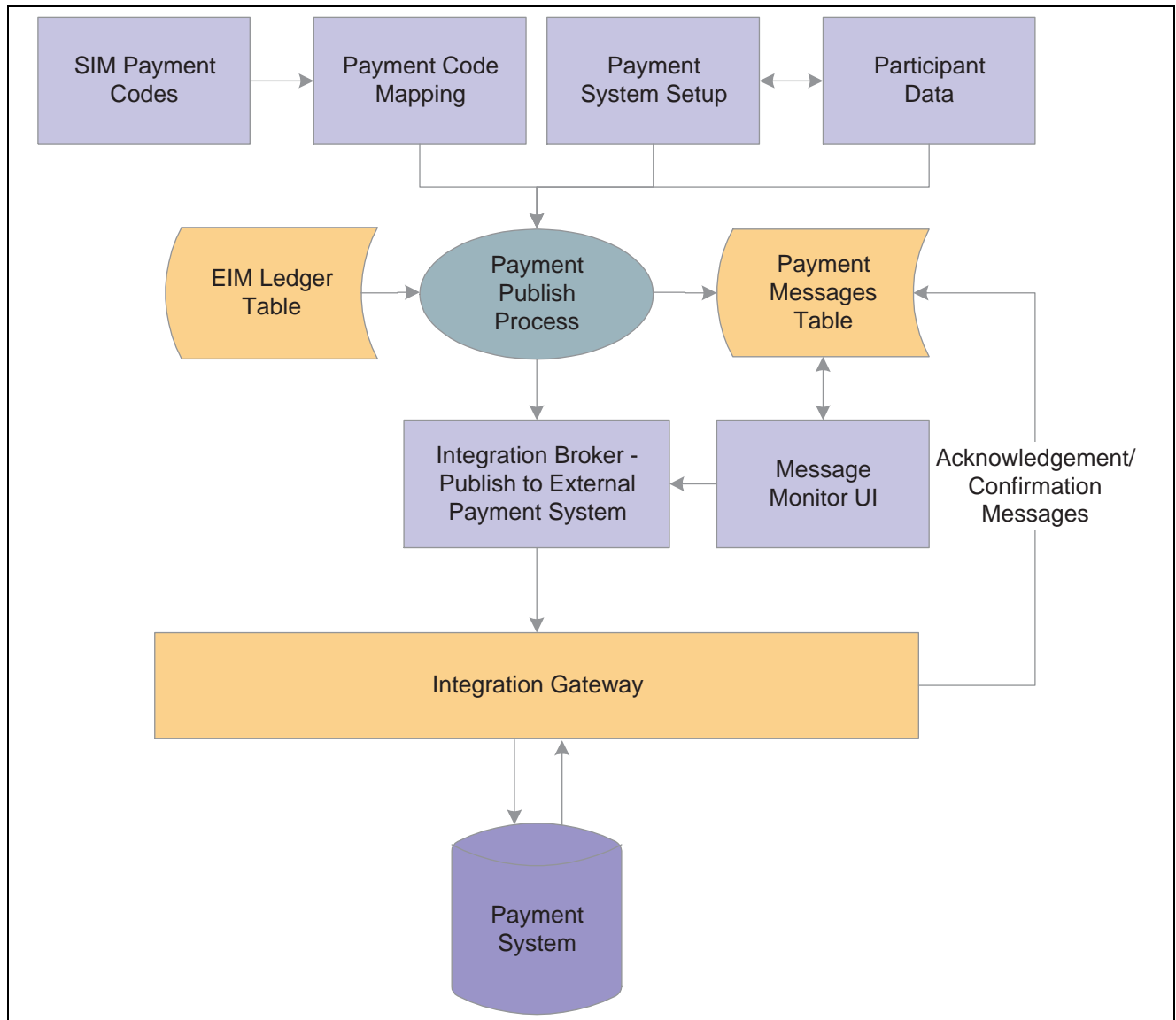
See Managing Payouts

8. Run the post-job step.

9. Run the publish job step (PUBLISH_PY) to publish payout request messages to the payment system.
10. Monitor the bidirectional exchange of payout messages.

See [Chapter 18, “Processing Incentive Transactions,” Monitoring Payment Messages, page 413](#).

The following diagram illustrates the process flow of the payment interaction process:



Payment Integration process flow

Understanding Payment Message Processing

This section provides an overview of payment message processing and discusses EIP messages and rejected payment requests.

Overview

Sales Incentive Management uses PeopleSoft Integration Broker to publish and subscribe to messages between the Sales Incentive Management system and the payment system. To publish payment requests to the payment system, compensation administrators must run the PUBLISH_PY step as part of their incentive plan processing after posting to the SIM ledger. This distinct step gives compensation administrators the choice to publish when necessary. The PUBLISH_PY step executes the PublishLedger Application Engine process. This process finds all unpublished ledger entries for participants in the specified business unit, creates disbursement ledger entries to reverse the SIM ledger entries, and publishes payment request messages. Sales Incentive Management delivers integration between the PeopleSoft Enterprise Payroll for North America. You must set up PeopleSoft Integration Broker to perform transformations, using predefined codesets, to data after the publish to integrate with other payment systems such as third-party software.

After the EIM engine publishes the payment request message, the compensation administrator, based on their business unit security, can use the Monitor Payments component to review the status of the payment messages between the Sales Incentive Management system and the payment system.

EIP Messages

As part of publishing payouts, the system has the following EIP messages:

Message Name	Description
PAYMENT_EIM_REQUEST	This message is sent from the Sales Incentive Management system to the payment system. Sales Incentive Management publishes a single request message regardless of the payment system being used. When the message is published, the Sales Incentive Management system adds reversal entries of type dispersal to the SIM ledger.
PAYMENT_EIM_ACKNOWLEDGE	<p>The payment system publishes an acknowledgement message. This message is received by Sales Incentive Management from the payment system after the payment request message has been run through the payment system's validation checks. This message is sent from PeopleSoft Enterprise Payroll for North America automatically as part of the subscription to the Payment Message Request. The Payment Acknowledgement Message indicates whether the payment is accepted or rejected. If rejected, it provides a reason code. The system also updates the ledger entry accordingly so that it is in a state to be republished.</p> <p>After receiving the acknowledgement message, the compensation administrator must review the status of each plan participant payroll request. If the payment request has a status of rejected, the compensation administrator must review the rejected reason, correct the problem, and then re-send the payment message. If the payment system rejects the payment even after all corrections to the message have been made, the compensation administrator must reverse the related disbursement entries in the SIM ledger.</p>

Message Name	Description
EI_PAYMENT_CODES_SYNC	<p>If you add or update a payment code, the Sales Incentive Management system publishes a message to the payment system that the change so that payment code mapping can be updated within the payment system.</p> <p>This message can be published to synchronize Sales Incentive Management payment codes with payment codes from payment systems other than PeopleSoft Enterprise Payroll for North America.</p>
PAYMENT_EIM_ISSUE	<p>This message is received by Sales Incentive Management from the payment system after the payment has been issued to the participant. In PeopleSoft Enterprise Payroll for North America, this means that the message is sent after paycheck creation. It is sent separately from the pay confirmation process. The payroll administrator must run a separate process to send this message after the payroll confirmation process is complete and checks have been created.</p> <p>The compensation administrator can verify the payment issued message against the payment request message, review the issue status, and check for any irregularities or unexpected paycheck status codes.</p> <p>Note. If PeopleSoft Enterprise Payroll for North America reverses a paycheck, it sends a payment issued message with a negative payout amount to reverse the amount paid, along with the original check number and date. Upon receipt of the reversal message, the ledger payment request is reset so that the Sales Incentive Management system can republish another payment request.</p>

Rejected Payment Requests

When the Sales Incentive Management system receives the acknowledgement message from the payment system, the Sales Incentive Management system displays the results on the Monitor Payments page on the Acknowledgment tab of the Payment Messages grid. The acknowledgement message informs the compensation administrator whether the payment was accepted or rejected and provides the reason. Based on the reason code from a rejected payment, the compensation administrator can determine the course of action to take. The following table lists a few possible rejection reasons and the actions to take:

Rejection Reason	Action
The acknowledgement message shows that the payment system rejected the payment due to invalid source data earning codes	The compensation administrator might need to update the earning codes in the Sales Incentive Management system and republish the payment message. The compensation administration might need to use the May Payment Codes page to remap the payment code that generated the invalid earnings code.

Rejection Reason	Action
A rejection in which the data in the payment message derived from a lookup table.	The compensation administrator can manually update the XML for the message through the Edit button on the Monitor Payments page.
Incorrect participant information. For example, perhaps the participant is not a valid employee in the payment system.	The compensation administrator must reverse the payment in the SIM ledger.

Page Used to Monitor Payments

Page Name	Object Name	Navigation	Usage
Monitor Payments	EI_PMT_MSG_MONITOR	Compensation, Sales Incentives, Calculate Incentives, Monitor Payments, Monitor Payments	Check the status of payment messages sent between the Sales Incentive Management system and to the payment system. You also use this page to publish the ledger outstanding for a single employee on demand. This page tracks the history of changes to payment messages.

Monitoring Payment Messages

Access the Monitor Payments page.

Monitor Payments

Payment Search Criteria

Payment System

Payment Code

From Participant ID

To Participant ID

From Payout Date

To Payout Date

Message Status

Message Sent

Acknowledged

Issue Received

Acceptance Status

Paycheck Status

Payments processed in the last Days

Refresh

☐ Select All

Publish Selected

Monitor Payments page (1 of 2)

Payment Messages							
		Customize		Find		First 1-8 of 8 Last	
Payment		Request		Acknowledgment		Issue	
Select	Edit	Payment Request ID	EmplID	Participant	Payment Code	Monetary Amount	Currency Code
1		2	KU0052	TC2	COM	60.000	USD
2		3	KU0051	TC1	COM	50.000	USD
3		4	KU0054	TC4	COM	85.000	USD
4		5	KU0053	TC3	COM	70.000	USD
5		6	KU0052	TC2	BONUS	162.500	USD
6		7	KU0051	TC1	BONUS	112.500	USD
7		8	KU0054	TC4	BONUS	262.500	USD
8		9	KU0053	TC3	BONUS	212.500	USD
<input type="checkbox"/> Select All						Publish Selected	

Monitor Payments page (2 of 2)

Payment Search Criteria and Message Sent

Use the fields in these group boxes to narrow your search for payment messages.

Payment System

Select the payment system for which you want to view payment messages. NAPY is the delivered value which indicates PeopleSoft Enterprise North American Payroll.

Payment Code

Select a specific payment code for which you want to view payment messages.

From Participant ID and To Participant ID

Select to search for payment messages for a specific range of participants based on their ID.

From Payout Date and To Payout Date

Select to search for payment messages for a specific range of payout dates.

Message Sent

Select *Yes* to search for only the messages that have already been sent to the payment system. The Acknowledged and Issue Received fields become available for edit. Select *No* to search for only the message not yet sent to the payment system. Select the blank value to exclude message status in the search.

Acknowledged

Select *Yes* to only search for messages where the payment system has already sent receipt acknowledgment back to the Sales Incentive Management system. The Acceptance Status field becomes available. Select *No* to search for only the messages sent but not yet acknowledged by the payment system. Select the blank value to search for both.

Issue Received

Select *Yes* to only search for messages for which the payment system had issues processing. Select *No* to search for only the messages for which the payment system had no issues. Select the blank value to search for both.

Acceptance Status

Search for messages with a status of *Rejected*, *Taken*, or both.

Paycheck Status

Search for messages according to a specific paycheck status.

Payments Processed in the Last <blank> Days	Select to search for payment messages processed within the specified number of days.
Refresh	Click this button to refresh the Payment Messages grid based on your search criteria.

Payment Messages

Use this grid to view, edit, and publish payout messages to the payment system. Every payment message line item contains the confirming data received from the payroll system, making it easy to verify key data such as payment date, check, or reference number. The Payment tab displays details about the payment. The Request tab shows details about the payment request message (PAYMENT_EIM_REQUEST) sent from the Sales Incentive Management system to the payment system. The Acknowledgement tab shows details about the acknowledgement message (PAYMENT_EIM_ACKNOWLEDGE) received from the payment system acknowledging receipt of the payment request message and whether the payment system accept or rejected that message. If rejected, the system displays the rejection reason sent from the payment system. The Issue tab displays the details of the payment issue message (PAYMENT_EIM_ISSUE) sent from the payment system to the Sales Incentive Management system indicating the paycheck status, date, and number. The paycheck number is the number of the check or advise issued by the payment system.

Select	Select this check box for a corresponding payment message row to mark it for publication to the payment system.
Edit	Click this button to access the access the Edit Payment Message page, where you can edit the details of the payment request before publishing or republishing it to the payment system. As a general rule, do not use this page to change data derived from transactions or data elements from the SIM ledger (such as amount or payment date).

Warning! Because the page takes the compensation administrator to a page where they can edit the attributes of the payment request message (such as Monetary Amount and Payment Codes), security for this page needs to be tightly controlled.

Select All	Select this check box to select all unpublished payment messages for publication to the payment system.
Publish Selected	Click this button to publish all selected rows of payment request messages to the payment system.

Viewing Participant Details

- To view participant details, use the Participant Details component (EI_SY_PCPN_MAIN).
- This section provides an overview of the Participant Details component and discusses how to:
- View high-level participant information.
 - View transaction processing data.
 - View draw schedules.
 - View variables.

- View transaction sources for aggregator variables.
- View ledger summaries.

Understanding the Participant Details Component

The View Participant Details component provides compensation administrators a central location from which they can review details associated with a specific participant's allocation, crediting, and incentive calculations. Compensation administrators can use this component to perform research to help them explain and clarify compensation transactions, commission and bonus payment, draw issuance and recovery, and a host of questions related to credit assignment, commission calculations, and final payment amounts. The component displays the incentive and configurations plans, transactions, draws, variables, and payments related to the participant. You can search for details for a specific date or period. Links throughout the component enable the compensation administrator access to pages on which you can maintain sales person and draw details as well as view compensation structure, plan, and transaction details.

For example, let's say that the compensation administrator is responding to a troubleshooting request from a sales participant. Based on specifics provided by the sales participant, the compensation administrator knows that she or he must review transactions, variables, and or payment information. The compensation administrator can thus access the View Participant Details component for that specific sales participant and use the provided information and links to other components to perform the necessary research. The compensation administrator reviews the transactions and compensation values for a particular plan for the participant and can thus accurately determine whether transaction have been allocated and credits and whether compensation values, such as bonuses, have been accurately calculated. If the compensation administrator finds an error in the plan rules, she or he can access the Maintain Compensation Structure component and correct the rule. If compensation administrators find an error on a transaction, they can access the transaction and make the necessary changes.

Pages Used to View Participant Details

Page Name	Object Name	Navigation	Usage
Participant Main Page	EI_PCPN_MAIN_PG	Compensation, Sales Incentives, Define Sales Org Structure, View Participant Details, Main Page	View high-level information about a participant's association to compensation structures and groups as of a specific date.
View Participant Details - Transaction Processing Summary	EI_PCPN_RC_PG	Compensation, Sales Incentives, Define Sales Org Structure, View Participant Details, Runs & Transactions Summary	View a summary of transaction processing for a participant for one or all periods. The system displays information according to the compensation structures and run context that are associated with the participant. You can also view the unprocessed transactions that the participant is associated with.

Page Name	Object Name	Navigation	Usage
Participant Draw Summary	EI_PCPN_DRAW_PG	Compensation, Sales Incentives, Define Sales Org Structure, View Participant Details, Draw Summary	View a snapshot of draw schedules for a participant. The snapshot includes often draw is issued to the plan participant, when it is scheduled to begin, the amount of the draw for each issuance, the number of draw periods, if draw is recoverable and any current draw balance.
View Participant Details - Participant Variables Summary	EI_PCPN_VARS_PG	Compensation, Sales Incentives, Define Sales Org Structure, View Participant Details, Variable Summary	View a summary of variables and associated values for a participant for one or all periods. For each variables, the system displays the variable ID, variable name, accounting period, fiscal year total values and unit of measure.
View Participant Details - Participant Ledger Summary	EI_PCPN_LDVAR_PG	Compensation, Sales Incentives, Define Sales Org Structure, View Participant Details, Ledger	View a summary of all payments associated with a participant by fiscal year, accounting period, and payment code. The system displays separate sections for details regarding payments that are published and unpublished. Published payments are visible to the participant. Unpublished payments are pending and have not been sent to payroll.

Viewing High-Level Participant Information

Access the Participant Main Page page.

Main Page | **Runs & Transactions Summary** | **Draw Summary** | **Variables Summary** | **Ledger**

Participant Main Page

Vandernoot,Dirk [Go to Maintain Participant](#)

Participant KUI009 **Effective Date** 01/01/2001 **SetID** SHARE

View Information as of Date

Specify Date 11/10/2004 Refresh

Compensation Structure Association

Customize | Find | View All | First 1-3 of 3 Last

	Business Unit	Tree Name	Node	Effective Date	Status	Exclude	Plan ID	Role ID	Context
1	CORP1	NA_SALES	BUSINESS_DEV	01/01/2001	Active	<input type="checkbox"/>	SMGR-IP	PART	10023754
2	GBIBU	GBIBU STRUCTURE	NORTHERN_CA	01/01/2001	Active	<input type="checkbox"/>	PSR-IP	PART	10024484
3	GBIBU	GBIBU STRUCTURE	WESTERN	01/01/2001	Active	<input type="checkbox"/>	SMGR-IP	MANAGER1	10024609

Group Membership

Customize | Find | View All | First 1 of 1 Last

	SetID	Group	Group Effective Date	Description
1	SHARE	INDIANA_MGRS	01/01/2001	Indiana Managers

Participant Main Page page

Go to Maintain Participant

Click this link to access the Maintain Sales Person page, where you can update data about the participant. For example, you might want to review the employee data, job data, and ensure that the employee is active.

Specify Date and Refresh

Select the date for which you want to view participant details. Click the Refresh button to populate the grids in this component with participant details according to the selected date.

Node

Click the node link for a specific compensation structure to access the <Participant Name> page, where you can view summary information about the compensation structure such as tree structure and allocation details. For example, you might want to that the participant is on the correct node and has the correct reference objects and configuration plan.

Plan ID

Click the plan name link for a specific compensation structure to access the Plan Rules page, where you can view a summary of transaction allocation rules, steps, sections, variables, and overrides for the plan according to a specific date.

Group

Click the name of the group link to access the Sales Person Group page, where you can review the group to which the participant belongs.

Viewing Transaction Processing Data

Access the View Participant Details - Transaction Processing Summary page.

Main Page
Runs & Transactions Summary
Draw Summary
Variables Summary
Ledger

Transaction Processing Summary

Vandernoot,Dirk
Go to Maintain Participant

Participant KUI009
Effective Date 01/01/2001
SetID SHARE

View Information by Period

Period Name February 2001
Refresh
View All

Runs that include participant

Customize Find View All
First 1-2 of 2 Last

Run Context	Period context	Fiscal Year	Period Begin	Period End	Plan ID	Tree Name	Tree Node	Description
555	456	2001	01/01/2001	01/31/2001	PSR-IP	GBIBU STRUCTURE	NORTHERN_CA	FRAComplete:8 FRARReady for Pos....
556	457	2001	02/01/2001	02/28/2001	PSR-IP	GBIBU STRUCTURE	NORTHERN_CA	FRAComplete:4 FRARReady for Pos....

Transactions Processing Summary page (1 of 2)

Unprocessed Transactions

Customize Find View All
First 1-10 of 55 Last

	Tree Name	Node	Plan ID	Business Unit	EIM Key	Stage ID	Allocate ID	Claim ID	Run State	Added By UI	Source Run Context
1	NA_SALES	BUSINESS_DEV	SMGR-IP	CORP1	C142	1	5043		Ready	<input checked="" type="checkbox"/>	
2	NA_SALES	BUSINESS_DEV	SMGR-IP	CORP1	C143	1	5044		Ready	<input checked="" type="checkbox"/>	
3	NA_SALES	BUSINESS_DEV	SMGR-IP	CORP1	C27	1	5046		Ready	<input checked="" type="checkbox"/>	
4	NA_SALES	BUSINESS_DEV	SMGR-IP	CORP1	C28	1	5047		Ready	<input checked="" type="checkbox"/>	
5	NA_SALES	BUSINESS_DEV	SMGR-IP	CORP1	C3	1	5049		Ready	<input checked="" type="checkbox"/>	
6	NA_SALES	BUSINESS_DEV	SMGR-IP	CORP1	C30	1	5050		Ready	<input checked="" type="checkbox"/>	
7	GBIBU STRUCTURE	WESTERN	SMGR-IP	GBIBU	H10	1	7987	8050	Ready	<input type="checkbox"/>	555
8	GBIBU STRUCTURE	WESTERN	SMGR-IP	GBIBU	H10	1	7987	8052	Ready	<input type="checkbox"/>	555
9	GBIBU STRUCTURE	WESTERN	SMGR-IP	GBIBU	H10	1	7987	8054	Ready	<input type="checkbox"/>	555
10	GBIBU STRUCTURE	WESTERN	SMGR-IP	GBIBU	H106	1	8017	8085	Ready	<input type="checkbox"/>	556

Transactions Processing Summary page (2 of 2)

View Information by Period

Period Name

Select a specific period that the participant is associated with for which you want to view information.

Refresh

Click this button to update the grids on this page with information according to the specific period that you select in the Period Name field.

View All

Click this button to view run contexts for all periods that the participant is associated with. the system by default displays all periods.

Runs that Include Participant

Run Context

Click a link in this column to access the more information about the run context for the specific run that includes the participant.

Unprocessed Transactions

View details about the participant's unprocessed transactions.

Viewing Draw Schedules

Access the Participant Draw Summary page.

Main Page / Runs & Transactions Summary / Draw Summary / Variables Summary / Ledger											
Participant Draw Summary											
Rabbitt, Sam Go to Maintain Participant											
Participant 769		Effective Date 06/01/1993				SetID SHARE					
Draw Schedules for Participant											
Customize Find View All First 1 of 1 Last											
Draw ID	Start Date	Amount	Current Balance	Currency	Draw Periods	Recovery	Rec Start Date	Payment Code	Tree	Node	Plan ID
1 199	01/01/2001	4500.00		USD	8 Y		04/01/2001	DRAW	WORLD	PACIFIC	PSR-IP

Participant Draw Summary page

Viewing Variables

Access the View Participant Details - Participant Variables Summary page.

Main Page / Runs & Transactions Summary / Draw Summary / Variables Summary / Ledger											
Participant Variables Summary											
Vandernoot, Dirk Go to Maintain Participant											
Participant KUI009		Effective Date 01/01/2001				SetID SHARE					
View Information by Period											
Period Name		February 2001 <input type="button" value="Refresh"/> <input type="button" value="View All"/>									
Variable Results By Period											
Aggregator Variables Summary											
Customize Find First 1-3 of 3 Last											
Variable ID	Variable Name	Description	Access ID	Fiscal Year	Period	Total	Plan ID	Tree Name	Tree Node		
1	505722 NEW_ACCTS_ATTAIN_ACS	New Accounts Attainment Acs	506006	2001	2		PSR-IP	GBIBU STRUCTURE	NORTHERN_C		
2	505726 PROD_REV_ATTAIN	Product Revenue Attainment		2001	2	242,500.000000000000000000	PSR-IP	GBIBU STRUCTURE	NORTHERN_C		
3	505727 PROD_REV_ATTAIN_ACS	Product Revenue Attainment Acs	505737	2001	1	993,500.000000000000000000	PSR-IP	GBIBU STRUCTURE	NORTHERN_C		
Numeric Variables Summary											
Customize Find First 1-3 of 3 Last											
Variable ID	Variable Name	Description	Access ID	Fiscal Year	Period	Total	Plan ID	Tree Name	Tree Node		
1	505725 NEW_ACCTS_PAYOUT_MTHLY	Monthly New Accounts Payout		2001	2	0.000000000000000000	PSR-IP	GBIBU STRUCTURE	NORTHERN_C		
2	505728 PROD_REV_ATTAIN_PCT_YTD	Product Rev Attainment % YTD		2001	2	132.466666666666667000	PSR-IP	GBIBU STRUCTURE	NORTHERN_C		
3	505730 PROD_REV_QUOTA_ACS	Product Revenue Quota Acs	505738	2001	1	750,000.000000000000000000	PSR-IP	GBIBU STRUCTURE	NORTHERN_C		

View Participant Details - Participant Variables Summary page

Period Name	Select a specific period that the participant is associated with for which you want to view information.
Refresh	Click this button to update the grids on this page with information according to the specific period that you select in the Period Name field.
View All	Click this button to variable information for all periods that the participant is associated with. The system by default displays all periods.
View	Click this button, which is in the Aggregator Variables Summary grid, to access the Transaction Source for Aggregator page, where you can view a detail listing of the transactions associated with the aggregator variable total.

Viewing Ledger Summaries

Access the Participant Ledger Summary page.

Participant Ledger Summary

Vandernoot, Dirk [Go to Maintain Participant](#)

Participant KUI009 **Effective Date** 01/01/2001 **SetID** SHARE

View Information by Period

Fiscal Year ---- and/or --- **Period Name** February 2001

Ledger Entries

Ledger Totals by Period and Payment Code

Fiscal Year	Accounting Period	Payment Code	Payout Amount	Currency	Payout UOM
1	2001	2 BONUS		USD	
2	2001	2 COM1	5415.00	USD	

Payments not published

Fiscal Year	Accounting Period	Payment Code	Payout	Currency
1	2001	2 BONUS		USD
2	2001	2 COM1	5415.00	USD

Participant Ledger Summary page

Fiscal Year	Select the fiscal year for which you want to view ledger information associated with the participant.
Period Name	Select a specific period that the participant is associated with for which you want to view information.
Refresh	Click this button to update the grids on this page with information according to the specific period that you select in the Period Name field.
View All	Click this button to variable information for all periods that the participant is associated with. The system by default displays all periods.

Managing Participant Reports

To manage participant reports, use the Manage Participant Reports component (EI_RPTS_MGMNT).

This section discusses how to manage participant reports.

Page Used to Manage Participant Reports

Page Name	Object Name	Navigation	Usage
Manage Participant Reports	EI_RPTS_MGMNT	Compensation, Sales Incentives, Calculate Incentives, Manage Participant Reports, Manage Participant Reports	Enable participant access to incentive reports.

Managing Participant Reports

Access the Manage Participant Reports page.

Manage Participant Reports

Report Details

Job ID PROD_REP_M **Run Context** 525

Business Unit GBIBU GBIBU

Product Category Sales Incentive Management

Market High Tech & Industrial

Plan ID [Job Monitor](#)

Reports [Customize](#) | [Find](#) | [View All](#) | [First](#) [Last](#)

Participant ID	Name	Plan ID	Plan Name	Description
KU0051	Murphy,Terry	PSR-IP	Product Sales Rep Plan	Sales Rep Commission Statement
KU0051	Murphy,Terry	PSR-IP	Product Sales Rep Plan	Credits Report
KU0051	Murphy,Terry	PSR-IP	Product Sales Rep Plan	Participant Unpaid Credits Report
KUI030	Houseman,Jerry	PSR-IP	Product Sales Rep Plan	Sales Rep Commission Statement
KUI030	Houseman,Jerry	PSR-IP	Product Sales Rep Plan	Credits Report
KUI030	Houseman,Jerry	PSR-IP	Product Sales Rep Plan	Participant Unpaid Credits Report
KUI003	Dacio,Margaret	PSR-IP	Product Sales Rep Plan	Sales Rep Commission Statement
KUI003	Dacio,Margaret	PSR-IP	Product Sales Rep Plan	Credits Report
KUI003	Dacio,Margaret	PSR-IP	Product Sales Rep Plan	Participant Unpaid Credits Report
KUI013	Maaks,Danielle	PSR-IP	Product Sales Rep Plan	Sales Rep Commission Statement
KUI013	Maaks,Danielle	PSR-IP	Product Sales Rep Plan	Credits Report
KUI013	Maaks,Danielle	PSR-IP	Product Sales Rep Plan	Participant Unpaid Credits Report
KU0064	Wong,Benny	PSR-IP	Product Sales Rep Plan	Sales Rep Commission Statement
KU0064	Wong,Benny	PSR-IP	Product Sales Rep Plan	Credits Report

Manage Participant Reports page

Use the Manage Participant Reports page to make reports available to sales participants. This page lets you control all generated participant reports, regardless of whether the report was generated as part of an engine or job process run, or if the report was generated on by a participant (generated by participants themselves). Using this page you can view the reports before marking them as available or unavailable to participants.

The page shows all report instances generated for both successful and failed report generation, and for immediate and batch reports. Each report is associated with a business unit, job ID, and run context.

If you have many reports generated for a job, you can view a subset of the reports created by the job using Filter on a Plan ID (each job can process one or more plans); filtering reports restricts the reports that are displayed to only the selected plan. To make a report viewable to participants, select the Viewable check box for that report. You can also Select All As Viewable or Unselect All.

See Also

Appendix A, “Sales Incentive Management Reports,” page 467

CHAPTER 19

Using Query Builder

This chapter provides an overview of Query Builder and discusses how to:

- Specify, save, and load results columns.
- Define query criteria.
- Save query definitions.
- View query results.
- Work with predefined queries.
- Edit object attribute values in bulk.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Query

Understanding Query Builder

Query Builder is a flexible tool that is used to query objects that are defined in the Sales Incentive Management system object catalog. You can use Query Builder to prompt for objects that you want to find, such as transactions of a specific type (orders, splits, participants, reference objects), and then edit or use these objects as input to a system process, such as transaction processing.

Query Builder lets you:

- Create queries of unlimited length and complexity.
- Select any number of available output fields to display results.
- Modify current queries to include different output and criteria.
- Run previously defined queries.
- Navigate to objects that are returned as query results.
- Group the output with counts, sums, and averages and include minimums and maximums for the grouped output.
- View the query as standard SQL.

Whereas PeopleSoft Query uses records and fields in queries, Query Builder queries objects and attributes. This approach has two benefits:

- You are more likely to recognize an object name than record and field names, and hence find it easier to query objects that are in the system.

- Underlying record and field definitions of system objects can change without affecting existing query definitions, resulting in more robust queries.

You can use Query Builder to create queries, or you can load and modify previously created and saved queries. Sales Incentive Management also uses Query Builder for prompting and searching. For example, you can invoke Query Builder from the Create Participant Groups page to help you find participants to assign to a participant group. Whenever you see the Query Builder button on a page, this indicates that the prompt is using Query Builder.

You can access an object that is returned in query results by clicking the object link on the Results page.

To access the Query Builder tool directly, use the Query Builder component (EQRY_SAMP_HTML_CMP).

Specifying, Saving, and Loading Results Columns

This section discusses how to:

- Specify results columns.
- Save results columns.
- Load results columns.

Pages Used to Specify, Save, and Load Results Columns

Page Name	Object Name	Navigation	Usage
Results Columns	EQRY_OUTPUT_PG	Compensation, Sales Incentives, Query Builder, Results Columns	Select the object attributes that you want to use as results columns in the query results. Select as many attributes as needed.
Save Columns	EQRY_OUT_S_PG	Click the Save Columns button on the Results Columns page.	Save current results columns selection to use in later queries.
Load Columns	EQRY_OUT_L_PG	Click the Load Columns button on the Results Columns page.	Load or append predefined results columns selection for use in the current query. The columns that are available depend on the target object that is selected when Query Builder is invoked.

Specifying Results Columns

Access the Results Columns page by selecting a search target from the Select Search Target page. For example, you may want to query Orders. In this case, you select Orders (Object ID = EORD) as the target object.

Results ColumnsCriteriaResultsQuery Def

Searching For

Orders

Effective Date09/20/2004

Select Attributes

HideMore...Expand AllCollapse All

LeftRight

Orders

Channel Reference Object

Customer

EIM Transaction

EIM Transaction Reporting Tbl

Participant Object

Product

Detail Grid

Selected Attributes	Sort	Group By	Count	Sum	Avg	Min	Max
Orders - EIM Key		<input type="checkbox"/>	<input type="checkbox"/>				
Orders - Price	Desc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Orders - Quantity Ordered		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Orders - Amount		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customer - Customer Name		<input type="checkbox"/>	<input type="checkbox"/>				

☒Detail Grid☒Aggregations

View Results

Load Columns

Clear Columns

Save As Default

Save Columns

Results Columns page

Use the Results Columns to select the object attributes that you want to search against. You can select any combination of the defined attributes for the object. You can group the results by any of the attributes, as well as have the system count the different groups. For attributes that are related to transaction amounts, the system can also sum, average, and indicate the minimum or maximum amounts.

At any point while defining results columns, you can run the query and view the results. You can then return to the Results Columns page to modify the query results columns, go to the Criteria page to refine the query selection, or save the definitions.

Select Attributes

The folders that are listed show the system objects that are directly associated with the selected target object. Click a folder to reveal the attributes for that object. For the selected target object, select the attributes to include as results columns. Click an attribute to append it to the Selected Attributes list.

You can rearrange the order of the selected attributes to determine the order in which they appear on the Results page. You can also determine the sort order of the data that is in each results column.

Hide

Hides the attribute tree.

More

When Query Builder first opens, the Select Attributes tree displays the system objects that are closely related to the target object through direct association. These relationships are defined in EIM metadata and represent the objects that you most often use in queries. If you can't find the objects that you want, you can access other objects by clicking the More link.

Expand All

Click to reveal the contents of all attribute tree folders.

Collapse All

Click to collapse all attribute tree folders.

Detail Grid

Select this check box to display the results columns as defined in the Detail Grid.

Aggregations

Select this check box to display the results based on the groupings that are selected in the Aggregations grid.

View Results	Click to run the query. The Results page opens, showing the results of the query.
Load Columns	(Optional) Click to load predefined attribute selections.
Clear Columns	(Optional) Click to remove the attributes that appear in the Selected Attributes list.
Save as Default	(Optional) Click to set the attributes that you select as the default attributes that appear each time that you use the target object.
Save Columns	(Optional) Click to save current attribute selections as a query.
Detail Grid	
Selected Attributes	Displays the default display attributes for the target object as defined in the EI_SY_MDIS_TBL (object display options) table. If no information is defined in this table for the selected target object, when the Results Columns page first appears, the Selected Attributes list appears by default to show the target object's list box items as they're defined in the Tools Record definition.
Move Arrows	Use the arrows to rearrange the attributes to determine the column display order in query results. For example, the attribute at the top of the Selected Attributes list appears as the leftmost column in the query results.
Sort	(Optional) Indicate a sort order for the attribute in the column results: <i>Blank</i> , <i>Asc</i> (ascending), and <i>Desc</i> (descending). You can sort one or multiple columns. Specifying multiple sorts causes column results to sort from left to right. Column results that are sorted have a link that appears in the column header in the query results.

Aggregations

Use the check boxes in this grid to indicate how you want the results to appear on the Results page. For example, you can tell the system to group the results by order number, and within each group, sum the order amounts as well as show the minimum and maximum amounts.

Saving Results Columns

Access the Save Columns page.

Enter an output name

*Output Name

ORDERAMOUNTBYNUMBER

Description

Order amounts stored by number

☒ Private Query

Save

Cancel

Save Columns page

Use the Save Columns page to save the results columns of the query. Enter a name and description for the query. The query is available to all users who have access to Query Builder. If you don't want the query generally available, select Private Query.

Loading Results Columns

Access the Load Columns page.

Select stored output column set to Load or Append to current selections

Load	Append	Name of column selections	Description	User ID	Private Query
Load	Append	EI_CA_ACCRUAL_QRY	Tranxs Calculated but not paid		<input type="checkbox"/>
Load	Append	EI_CA_PSTD_TRANSX	Transx Posted to the Ledger		<input type="checkbox"/>
Load	Append	EI_CA_UNALLOCATED_TX	Unallocated Transx		<input type="checkbox"/>
Load	Append	EI_CA_UNCREDITED_TX	Uncredited Tranxs		<input type="checkbox"/>
Load	Append	EI_SI_COMDTL_QRY	Commission Details		<input type="checkbox"/>
Load	Append	EI_SI_COMSUM_QRY	Commission Summary Query		<input type="checkbox"/>
Load	Append	EI_SI_OPMVAR_QRY	Opportunity PM Variable		<input type="checkbox"/>
Load	Append	EI_SI_OPPSUM_QRY	Opportunity Sum		<input type="checkbox"/>
Load	Append	EI_SI_OPPX_QRY	Opportunity Transactions		<input type="checkbox"/>
Load	Append	EI_SI_PAY_AGG_QRY	Aggregation Engine		<input type="checkbox"/>
Load	Append	EI_SI_PAYDTL_QRY	Payout Detail		<input type="checkbox"/>
Load	Append	EI_SI_PAYSUM_QRY	Payout Summary Query		<input type="checkbox"/>
Load	Append	EI_SI_PMVAR_QRY	Performance Measure Var. Query		<input type="checkbox"/>
Load	Append	EQRY_SU_CUSTOMERS	Customer Information		<input type="checkbox"/>
Load	Append	EQRY_SU_MYTEAM	My Sales Team		<input type="checkbox"/>
Load	Append	EQRY_SU_PRODUCTINFO	Product Informations		<input type="checkbox"/>
Load	Append	EQRY_SU_RTEX_DTL	My Transaction Details		<input type="checkbox"/>
Load	Append	EQRY_SU_SUB_ORDERS	My Salespeoples Order Details		<input type="checkbox"/>
Load	Append	ORDERAMOUNTBYNUMBER	Order amounts stored by number	VP1	<input checked="" type="checkbox"/>

[Cancel](#)

Load Columns page

Use the Load Columns page to add saved results columns to the query. The page displays all of the column sets that are saved by all users as well as the column sets that you save and mark as private.

Load	Replaces the results columns in the query.
Append	Adds the results columns onto the query.
User ID	Displays the user who created and saved the results columns.
Private Query	Indicates the private queries.

Defining Query Criteria

This section discusses how to:

- Define query criteria.
- Select a value.
- Save query criteria.
- Load query criteria.

Pages Used to Define Query Criteria

Page Name	Object Name	Navigation	Usage
Criteria	EQRY_ISCRIPT	Compensation, Sales Incentives, Query Builder, Criteria	Specify the attributes for which you want to query, and define expressions by using operators and values.
Criteria Attribute Tree	EQRY_ATT_TREE_PG	Click the Select Attribute button next to the Attribute Name field.	Using the object selection tree, navigate to the attribute that you want to use as query criteria and select it.
Select Value	EQRY_VBUILD_PG	Click the Value lookup button.	Select the attribute value to use as query criteria
Save Criteria	EQRY_PROP_PG	Click the Save Criteria button on the Criteria page.	Save the current criteria selection by name for use in later queries. The system saves the query criteria selection for the target object that is selected when Query Builder is invoked.
Load Criteria	EQRY_LOAD_PG	Click the Load Criteria button on the Criteria page.	Load an existing criteria selection.

Defining Query Criteria



Access the Criteria page.

The screenshot displays the 'Criteria' page of the Query Builder. At the top, there are tabs for 'Results Columns', 'Criteria' (selected), 'Results', and 'Query Def'. Below the tabs, the text 'Searching For Orders' is visible, along with an 'Effective Date' field set to '09/20/2004'. The main area contains a table with columns 'Attribute Name', 'Operator', and 'Value'. The first row shows 'Orders - Order Date' with a 'Between' operator and the value '2001-01-01 AND 2001-01-31'. The second row shows 'Orders - Amount' with a 'Between' operator and the value '10000 AND 1000000'. At the bottom of the page, there are four buttons: 'View Results', 'Clear Criteria', 'Save Criteria', and 'Load Criteria'.

Criteria page

After you load or define the query results columns, you can optionally add criteria to filter the query results on the Criteria page. You can only select attributes from the objects that are selected on the Results Columns page. Specify as many criteria rows as needed, or save a criteria selection for later use to use as a predefined query selection in the current query.

By using indentation in expressions, you can create queries that are as complex as you need. Query Builder intelligently parenthesizes the expressions to ensure that the query is evaluated correctly.

Attribute Name	Displays the name of the attribute that you selected on the Select Criteria page to use in the query criteria.
	Click this button to view a list of all defined attributes for the object on the Select Criteria page. Select an attribute to return to the Criteria page.
Operator	Select an operator to define the condition for the criteria.
Value	Enter a value for the selected attribute to use as query criteria.
	Use these arrows and the logical operators AND and OR to format the expression. Query Builder automatically parenthesizes expressions by using the indentation to group expressions, ensuring that the query is evaluated correctly.
Clear Criteria	Click to remove all current attribute names and value selections and start over.
Save Criteria	(Optional) Click to save current attribute name and value selections.
Load Criteria	(Optional) Click to load predefined attribute name and value selection.

Selecting a Value

Access the Select Value page to select the values that you want to use to filter the query.

The fields on the page differ depending on the operator that you select on the Criteria page.

If you use the between or not between operators, you select a From and To value.

If you used the like, not like, equal to, not equal, greater than, less than or equal to, less than, or greater than or equal to, you select a value for the system to compare the result to.

If you use the in or not in operator, you can select one or more check boxes for the values within which you want the system to return the results.

At any point while defining the criteria, you can click the View Results button to run the query, and then return to the Criteria or Results Columns page to modify or (optionally) save the definitions.

Saving Query Criteria

Access the Save Criteria page.

After selecting the criteria, you can save the query definition for future use. On the Save Criteria page, enter a name and description for the query and indicate whether or not you want it to be a private query.

Loading Query Criteria

Access the Load Criteria page.

This page works just like the Load Columns page, and displays all of the query criteria sets that are saved by all users as well as the sets that you save and mark as private.

Saving Query Definitions

This section discusses how to save a query definition.

Page Used to Save Query Definitions

Page Name	Object Name	Navigation	Usage
Query Def (query definition)	EQRY_COMBO_SAVE_PG	Compensation, Sales Incentives, Query Builder, Query Def	Save the current query or load a predefined query.

Saving a Query

Access the Query Def page.

Results ColumnsCriteriaResultsQuery Def

Searching For

Orders

*Output/Criteria Name

ORDERSJAN2001

Description

Orders by amount for Jan 01

Query Type

☒ Private Query

Save

Load

Query Def (query definition) page

While defining a query, you can save the results columns and criteria as separate definitions. This enables you the flexibility to mix and match various results columns and criteria. You can also save a query definition, which is a combination of an output (results columns) selection and a criteria selection.

- Output/criteria Combination and Description**

Enter a name under which to save the query and a description of the query. When you save a Query Builder query, both the output (results column) and the criteria selection are saved.
- Query Type**

Select a query type value if the query is for use with a specific system utility that uses predefined queries. Select the *Participant Query* value to save the

predefined query for use with the Participant Search utility. Or select the *Configurable UIO*, *Dynamic Group*, or *Job Query* values if the predefined query is for use with these respective utilities.

Private Query	Select this check box so that the system says the query as a private query that can only be accessed by your user ID.
Modify Participant Groups	Click this link to access and modify the participant query group for the predefined participant queries.
Save	Click this button to save the newly created query. When you save a query, the system creates a predefined query record and, for participant queries, a participant query group record.
Load	Click this button to load a predefined query that already exists.

Viewing Query Results

This section discusses how to view query results.

Page Used to View Query Results

Page Name	Object Name	Navigation	Usage
Results	EQRY_RESULT_PG	Compensation, Sales Incentives, Query Builder, Results	View the query results by using the column results and criteria that you specify. If necessary, you can rerun the query after modifying the criteria on the Results Columns and Criteria pages.

Viewing Query Results

Access the Results page.

Results Columns Criteria Results Query Def

Searching For Orders

Effective Date09/20/200431

View SQLDownload to ExcelAdd NewRerun Query

View AllFirst1-15 of 15Last

	EIM Key	Price	Quantity Ordered	Amount	Customer Name
1	C142	0	10	50000	Greyson Construction
2	C143	0	6	48000	Greyson Construction
3	C144	0	1	50000	Greyson Construction
4	C27	0	10	50000	Greyson Construction
5	C27	0	10	50000	Greyson Construction
6	C28	0	6	48000	Greyson Construction
7	C29	0	1	50000	Greyson Construction
8	C3	0	10	50000	Greyson Construction
9	C3	0	10	50000	Greyson Construction
10	C30	0	10	50000	Greyson Construction
11	H10	0	4	1000000	Riley Sunglass Company
12	H10	0	4	1000000	Riley Sunglass Company
13	H48	0	6	48000	Greyson Construction
14	H5	0	1	50000	Greyson Construction
15	H5	0	1	50000	Greyson Construction

1-1 of 1

	Amount
Total	2644000
Min. Value	48000
Max. Value	1000000

Results page

Use the Results page to view the results of the query. You can click any of the links that are in the results columns to go to the application page where the attribute is defined. For example, if you click one of the Order Number links that is in the Orders query, the system opens the Update Order Transactions component. You can review the order transaction and make any changes or corrections to that order.

View SQL

View the SQL for the current query.

Download to Excel

Click this link to download the current query results to a Microsoft Excel spreadsheet. By default, only the first 50 records of the query are downloaded to the spreadsheet. To download all query results, click the View All link, and then click the Download to Excel link.

Add New

Click this button to add new data to the component. The system displays the component for you to add the data.

Rerun Query

Rerun the current query.

Results grid

Shows the current query results. Click an object link to display the system page for that object instance to review or edit details for the object.

Aggregations grid

Shows the results sorted and totaled based on the check boxes that you select on the Results Columns page. This grid is only visible if you select the Aggregations check box on the Results Columns page.

Working with Predefined Queries

To work with predefined queries, use the Pre-Defined Queries component (EQRY_VIEWER_CMP).

This section discusses how to work with predefined queries.

Page Used to Work with Predefined Queries

Page Name	Object Name	Navigation	Usage
Pre-defined Queries	EQRY_VIEWER_PG	Compensation, Sales Incentives, Review Incentive Information, Pre-Defined Queries	View predefined queries that you create. Also run public queries that other users define.

Working with Predefined Queries

Access the Pre-defined Queries page.

Output/Criteria Name

Effective Date 09/20/2004

Output/Criteria Name EI_CA_LEDGER_PYMTS

Description Pymts Posted to the Ledger

Searching For EIM Ledger

[View SQL](#)
[Download to Excel](#)
[Add New](#)
[Rerun Query](#)
[View Definition](#)

View All										First	1-6 of 6	Last
Business Unit	Accounting Period	Fiscal Year	Participant ID	Payment Code	Payout Amount	Payment Currency	EIM Payout Unit Of Measure	Date Posted				
1 GBIBU		1	2002 KU0023	COM	35.24 USD			2002-01-15				
2 GBIBU		1	2002 KU0051	COM	6318.28 USD			2002-01-15				
3 GBIBU		2	2002 KU0051	COM	96.14 USD			2002-02-15				
4 GBIBU		1	2002 KU0136	COM	219.6 USD			2002-01-15				
5 GBIBU		1	2002 KU0137	COM	1676.47 USD			2002-01-15				
6 GBIBU		2	2002 KU0137	COM	24.03 USD			2002-02-15				

Pre-defined Queries page

Select a query by searching on output and criteria combination, description, original class ID, or a combination of these. Then click the query result that you want to run. Click the View Definition link to access the Query Def page of the Query Builder component, where you can change the results columns, attributes, or criteria of the query and rerun the query.

Predefined queries are also available by loading existing query definitions from within Query Builder.

Editing Object Attribute Values in Bulk

This section discusses how to edit object attribute values in bulk.

Pages Used to Edit Objects

Page Name	Object Name	Navigation	Usage
Bulk Editor	EQRY_BLK_ED_PG	Compensation, Sales Incentives, Query Builder, Results Click the Bulk Edit button in the column header for attributes enabled for bulk editing.	Make a change to all objects that meet the selected criteria.

Editing Objects Attribute Values in Bulk

Access the Bulk Editor page.

Bulk Editor

Attribute Name

Commission %

Replacement Operator

Increase By %

Replacement Value

20

Save

Cancel

Bulk Editor page

Use Query Builder to search for and select objects that you need to make changes to in bulk. The system locates all objects with the attributes and criteria that you select and makes the same change to all of the applicable data rows. You can simply replace one value with another, or change the value by using a mathematical expression, such as plus, minus, or percent.

After you run the query and locate the objects, an edit button appears in the column header on the Results page for those attributes that are editable. You can only edit those attributes that have the Allow Modifications flag selected on the Object Attribute Subpage page. To see what attributes are editable, you can run a query by using the target object of OATT and define the criteria of allow modification equal to yes. You can narrow the query to a specific class ID on the Criteria page.

The system verifies that you want to make the change when you click save. The system then displays the number of fields and rows that are impacted by the change.

Replacement Operator

Select the mathematical operation that you want to perform. Values are *Decrease by %*, *Divided By*, *Increase by %*, *Minus*, *Plus*, and *Times*. This field is available only for numeric values.

Replacement Value

Enter the value you want the data to be replaced with or the amount that the system uses to perform the mathematical operation that is selected in the Replacement Operator field.

CHAPTER 20

Managing the Participant Reporting Interfaces

This chapter provides an overview of Sales Incentive Management (SIM) participant reporting interfaces, lists prerequisites, and discusses how to:

- Maintain participant user interface (UI) metadata labels.
- Maintain user interaction objects (UIOs).
- Create UIO groups.
- Configure queries for the My Commission and Subordinates' Commission pages.
- Set up problem reporting.
- Set up the Participant Search utility.
- Use reporting infrastructure services.
- Review participant sales compensation information.

Understanding the Participant Reporting Interfaces

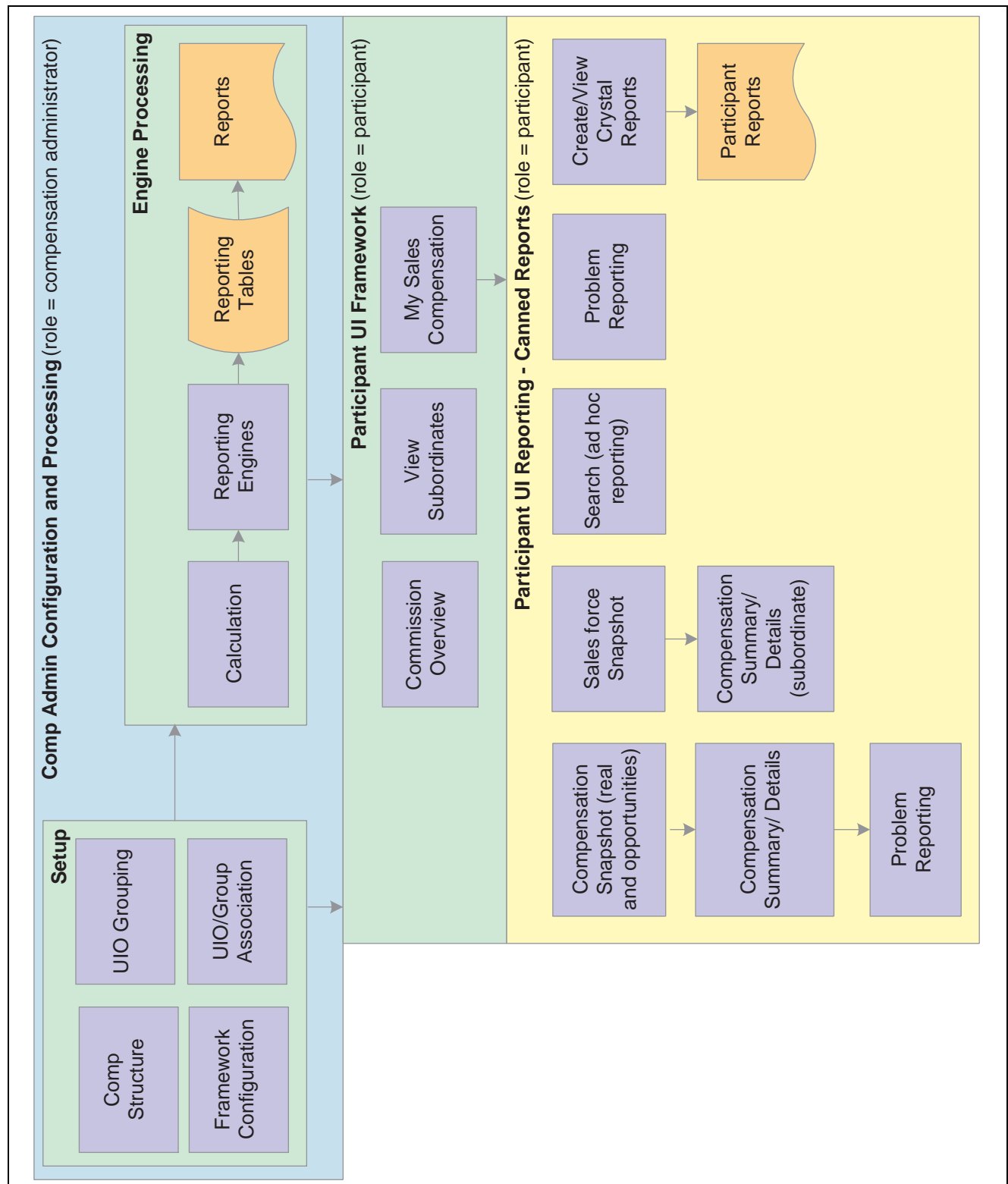
This section contains an overview of the SIM reporting process, and discusses security and compensation administrator configuration ability.

SIM Reporting Process and Participant UI Overview

The SIM reporting process includes several components:

- UIOs that contain definition data for a SIM reporting web page or report.
- Production and reporting tables that contain report-worthy incentive information and are the sole source of reporting information.
- Job steps that move reporting data throughout the SIM system.
- The Participant UI Framework, which manages participant access and navigation and defines which pages and reports a participant can access.
- Participant UI reporting pages that contain the published incentive compensation results.

The following diagram illustrates the SIM reporting process and its components:



Understanding Sales Incentive Management reporting

1. UIOs are registered to the system. (System administrators generally perform this task, which is not illustrated in the diagram.)
2. Registered UIOs can be edited and grouped into logical categories.

Then they are associated with a participant on a compensation structure, based on participant's role and position in the compensation structure hierarchy. (Compensation administrators generally perform this task.)

3. During the incentive calculation job process, the SIM replication engine copies report-worthy data from the SIM production tables to the SIM reporting tables.
4. The report manager is the interface for the SIM reporting services that enables compensation administrators to control report generation and report visibility to participants.

The compensation administrator uses the report manager interface to review data in the SIM reporting tables, and select which report data to publish to participants.

5. The Participant UI Framework assembles a participant's unique user interface, based on the specific UIOs associated with the participant and their effective dates.

The Participant UI Framework then populates the various SIM participant UI reporting pages with reporting data marked published. The Participant UI Framework supports the display of incentive data to participants through static Pure Internet Architecture (PIA) pages, Crystal reports, and configurable UIOs.

One component of the Participant UI Framework is the Configurable UIO Viewer. The Configurable UIO Viewer uses the configurable UIO setup data to figure out what data elements exist on each page, how the data should be formatted, and which navigation paths should be available to the user. It invokes the Query Builder API to retrieve transactional data, when necessary, and then generates the HTML and renders the results to the browser. The Dynamic Page is a container used by the Configurable UIO Viewer to render data to the end user. During runtime, the Configurable UIO Viewer simply reads and assembles the Dynamic Page according to the configurable UIO definitions.

The Dynamic Page itself is a PeopleTools page object and has all the necessary interfaces that are required by PeopleTools to work under the PeopleSoft Pure Internet Architecture. This includes having a menu and a component. It has a search record and is delivered with update/display security. The Configurable UIO setup data represents the virtual definition of a dynamic page and dictates the look and feel of the page, rather than the traditional PeopleTools tables.

See Also

[Chapter 5, "Managing User Interaction Objects," page 91](#)

Security for the Participant UI Framework and Reporting Pages

The Participant UI Framework and reporting pages leverage both PeopleTools and SIM security settings to ensure that participants only view the data they are supposed to view. Security for the Participant UI Framework and reporting pages is based on a combination of the participant's role, his or her position in the compensation structure, and other security-related relationships.

Establishing security for SIM participants can be divided into two areas: establishing general security using PeopleTools Security, and establishing individual participant security using SIM UIOs. Most of the security definition data used by the participant UI is established when you set up security (as discussed in the Setting Up Security chapter). All participant UI pages are set with *Update Display* access and are registered as PeopleTools components using PeopleTools Security. The participant UI pages are part of SIM-specific permission lists, which is attached to each sales manager and sales participant role. The SIM-specific permission lists also determine which process to run to generate reports (either Crystal or SQR), and which records a participant can access. With this general security, participants initially have access to all participant UI pages. PeopleSoft software also provides sales manager and sales participant roles that are specific to market templates.

The second security layer associates UIOs with a participant on a compensation structure. The associated UIOs determine which participant UI pages the participant can see. Here a compensation administrator can determine whether a participant receives access to pages and reports intended for a participant role or manager role. UIOs use the security definitions stored on the SIM Security table to enforce row-level security in SIM.

The Participant UI Framework—which is transparent to a participant—becomes active when a participant logs into the system and accesses SIM. Working with security definitions, the Framework determines which compensation structures a participant is associated with and the PeopleTools components the participant can access on a particular structure. The system then dynamically constructs the appropriate Commission Overview and My Sales Compensation pages before giving control to the participant UI.

The system also uses these security definitions to determine time period access and query access. The calendar associated with a business unit defines the calendar period in which a participant can see data for a compensation structure. Participants associated with a structure only have access to the structure's information for the period in which it is granted.

See Also

[Chapter 6, “Setting Up Security,” page 139](#)

Configuration Ability for Compensation Administrators

With Sales Incentive Management, your compensation administrator is in complete control of what participants can view. Administrators can:

- Define which territories are accessible.
- Define the type and format of compensation information that is viewable.
- Define labels and column headings for the participant UI pages.
- Construct custom UI pages based on configurable UIO definitions.
- Control the publishing of report-worthy data that populates the participant UI pages.

The following areas of configuration determine what reporting information participants can view:

- Registration of metadata objects—base classes, derived classes, and UIOs.
- Construction of configurable UIO definitions.
- Configuration of security settings and permissions.
- UIO object association to a participant and plan combination on a compensation structure.

Of these three areas, the UIO object association has the most immediate impact on report information visibility.

See Also

[Chapter 5, “Managing User Interaction Objects,” Constructing Configurable UIOs, page 101](#)

[Chapter 2, “Understanding Sales Incentive Management,” Incentive Compensation Reporting, page 23](#)

[Chapter 4, “Registering Base and Derived Classes,” page 77](#)

[Chapter 5, “Managing User Interaction Objects,” page 91](#)

[Chapter 6, “Setting Up Security,” page 139](#)

[Chapter 18, “Processing Incentive Transactions,” page 367](#)

Prerequisites

Before working with UIOs, you must:

- Register UIOs in the system.

This includes any new UIOs you create for custom reporting purposes.

- Establish security settings.

See Also

[Chapter 5, “Managing User Interaction Objects,” page 91](#)

[Chapter 6, “Setting Up Security,” page 139](#)

Maintaining Participant UI Metadata Labels

For participant UI pages based on UIO PIA pages, the system derives participant UI field labels and column headings that appear on web pages from metadata object labels. Define these labels in the Description field of the Attributes section on the Object Catalog page for a specific metadata object. By editing the text that appears in the Description field, you affect the participant UI page display. There is one exception where field labels and column headings are not derived from metadata object labels. Non-field objects, such as grids and scroll areas, are not part of metadata. The system therefore populates their labels from the PeopleTools Message Catalog.

For participant UI pages based on configurable UIO definitions, the system populates labels according to the configurable UIO definition. You define page titles on the Page Title page. You define section labels in the Section Name field on the Configurable UIO - Page page. For query-based sections, you define field labels in the Section Body group box on the Query Section page. When adding new configurable UIOs to the system, by default, the system uses the attribute descriptions from the metadata objects that you have included as output fields of the source query to save time and effort during setup.

See Also

[Chapter 4, “Registering Base and Derived Classes,” page 77](#)

[Chapter 5, “Managing User Interaction Objects,” Constructing Configurable UIOs, page 101](#)

Maintaining UIOs

To maintain UIO descriptions for UIO pages and reports, use the User Interaction Descr - Pages (EI_UO_PG1) and User Interaction Descr - Reports (EI_UO_RP1) components.

This section lists prerequisites and discusses how to:

- Maintain UIO page and report descriptions.
- Set up configurable participant UI pages.

Prerequisites

You must first define and register UIOs in the Sales Incentive Management system before you can use or edit them.

See Also

[Chapter 5, “Managing User Interaction Objects,” page 91](#)

Pages Used to Maintain UIOs

Page Name	Object Name	Navigation	Usage
User Interaction Descr - Pages	EI_UO_PG1	Compensation, Sales Incentives, Define Sales Org Structure, User Interaction Descr - Pages, User Interaction - Pages	Edit effective date, status, and description information for UIO PIA pages.
User Interaction Descr - Reports	EI_UO_RP1	Compensation, Sales Incentives, Define Sales Org Structure, User Interaction Descr - Reports, User Interaction - Reports	Edit effective date, status, description, and report mode information for UIO reports.

Maintaining UIO Page and Report Descriptions

Access the User Interaction Descr - Pages page or the User Interaction Descr - Reports page.

Effective Date and Status	Edit the effective date and status of the UIO to control if and when it is active for participants. By control these settings, you can control whether participants can view the participant UI page or report associated with the UIO without having to modify UIO assignments to participants and plans on compensation structures.
UIO Name and Description	Edit the name and description for this UIO to create more familiar report names and descriptions for your participants. For participants associated with this UIO on a compensation structure, the system displays, on their My Sales Compensation page, the UIO name as the link through which the participant can access this UIO.
Report Mode	(Reports only) Select if this report object can be generated as an <i>Ad Hoc</i> report or in a <i>Batch</i> run. Ad-hoc reports are generated on request by the participant. For report objects marked with <i>Batch</i> , the reporting service pre-generates the report during SIM job processing.

Note. All delivered UIO Reports are set to *Ad Hoc* for faster processing of incentive plans.

See Also

[Chapter 5, “Managing User Interaction Objects,” Setting Up UIO Pages, page 97](#)

[Chapter 5, “Managing User Interaction Objects,” Setting Up UIO Reports, page 97](#)

Setting Up Configurable Participant UI Pages

You can construct configurable UIO definitions that define all aspects of the participant UI pages through the User Interaction - Configurable setup component. Through this component, you can control the report information that participants see when they access the participant UI pages and that the system renders based on the definition. These definitions are instances of the configurable UIO derived class object.

See Also

Chapter 5, “Managing User Interaction Objects,” Constructing Configurable UIOs, page 101

Creating UIO Groups

To create user interaction groups, use the User Interaction - Groups component (EI_UIO_GRP).

The UIO grouping functionality enables you to more efficiently manage UIOs. You can create a logical group of UIOs to associate with a specific type of participant—for example, creating a Manager Reports group that contains all UIO reports pertinent to a manager. You can also create a UIO group that contains other UIO groups. For example, an “All Reports” UIO group might comprise of a Manager Reports UIO group (containing all manager reports) and a Participant Reports UIO group (containing all participant reports). You can include in your UIO groups UIO PIA pages, UIO reports, configurable UIOs, or any combinations of these three UIO types.

The way that you group UIOs determines the way information appears on the My Sales Compensation page. If you assign single UIOs to a participant, these single UIOs are displayed together in the Miscellaneous section of the participant’s My Sales Compensation page. If you assign a UIO group to a participant, the system displays all UIOs that are included in the UIO group together on the My Sales Compensation page within a functional area that you define as part of the UIO group definition.

With UIO groups, the system only displays first-level groups, which are single UIOs included in a group ID. For example, grouping the Credits, Sales Force Commission Statement, Indirect Credits, and Manager Unpaid Credits reports under a group ID of *Manager Reports* is a first-level group. Sales Incentive Management also provides the ability to create second-level groups, or groups of first-level groups, to facilitate your assignment of UIOs to participants a compensation structure. However, the system displays the individual first-level group members when it renders the participant’s My Sales Compensation page.

Page Used to Create UIO Groups

Page Name	Object Name	Navigation	Usage
User Interaction - Groups	EI_UIO_GRP	Compensation, Sales Incentives, Define Sales Org Structure, User Interaction - Groups, User Interaction - Groups	Define a logical group of UIOs that you can then associate with participant and plan combinations on a compensation structure.

Creating UIO Groups

Access the User Interaction - Groups page.

User Interaction - Groups

SetID SHARE
UIO Group 45000

UIO Group Details
Find | View All
First 1 of 1 Last

*Effective Date 01/01/1900

*Status Active

*Name Manager Reports

☐ Is Group of Groups?

Description
Access reports about your sales force, including credit and commission reports

Image specified below will be displayed on Sales Compensation home page for group "Manager Reports".

Image Name PS_PROC_MANAGER_REPORT_I

Product Category Sales Incentive Management

☒ System Data

Market Template High Tech & Industrial

Members
Customize | Find
First 1-4 of 4 Last

	*Member ID		User Interaction Object Name	Sequence Number		
1	4501		Credits Report	1		
2	4502		Sales Force Commission Stmt	2		
3	4504		Indirect Credits Report	3		
4	4505		Manager Unpaid Credits Report	4		

User Interaction - Groups page

Name and Description

Enter the name and description of this UIO group. When the system renders the My Sales Compensation page for a participant assigned to this UIO group, it displays a functional area with the name and description that you enter here.

Is Group of Groups?

Select this check box to indicate that this is a second-level UIO group, meaning that it contains first-level UIO groups within it. You must first define the first-level UIO groups so that you can include them in the definition of your second-level UIO groups. When you select this check box, the system changes the Members grid to enable you to add UIO groups rather than individual UIO members.

Image Name

Select the image that you want the system to display on the My Sales Compensation page for this UIO group. The image appears to the left of the functional area that this UIO group defines.

Query Builder, Member ID and UIO Group ID

Click the Query Builder button to view a list of possible members to add to the UIO group. The system determines the list of available group members based on your selection for the Is Group of Groups? check box. If you select this check box, Query Builder returns a list of UIO groups; otherwise, Query

	Builder returns a list of individual UIO members. Select a UIO member or UIO group. The system displays your selection in the Member ID field or UIO Group ID field.
User Interaction Object Name and Description	The system displays the UIO name or UIO group description based on your member ID selection.
Sequence Number	Define the display order of UIO links on a participant's My Sales Compensation page. The system displays links in numerical ascending order.

Configuring Queries for the My Commission and Subordinates' Commission Pages

To configure queries for the My Commission and Subordinates' Commission pages, use the Configure Commission Overview - Query Setup (EI_PUF_QRY_CO) and Configure View Subordinates - Query Setup (EI_PUF_QRY_VS) components.

This section discusses how to set up query configuration.

Page Used to Configure Queries for the My Commission and Subordinates' Commission Pages

Page Name	Object Name	Navigation	Usage
Configure Commission Overview - Query Setup	EI_PUF_QRY_CO	Compensation, Sales Incentives, Define Sales Incentive Options, Configure Commission Overview	Select the query that the Participant UI Framework uses to display data on the My Commission page. Also select the display settings for the fields within the selected query.
Configure View Subordinates - Query Setup	EI_PUF_QRY_VS	Compensation, Sales Incentives, Define Sales Incentive Options, Configure View Subordinates	Select the query that the Participant UI Framework uses to display data on the Subordinates' Commission page. Also select the display settings for the fields within the selected query.

Setting Up Query Configuration

Access the Configure Commission Overview - Query Setup page or the Configure View Subordinates - Query Setup page.

Configure Commission Overview Query Setup

***Output/Criteria Name**

Commission Overview Query

Fields Customize | Find | First 1-5 of 5 Last

Description	Attribute Label	Visible	Show Total	Order of Appearance
Plan - Description	<input type="text" value="Plan"/>	<input checked="" type="checkbox"/>		<input type="text" value="5"/>
PerfMeasure - Description	<input type="text" value="Performance Measure"/>	<input checked="" type="checkbox"/>		<input type="text" value="10"/>
CommissionOverview - Commission	<input type="text" value="Commission"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="15"/>
CommissionOverview - Relationship	<input type="text" value="Relationship"/>	<input checked="" type="checkbox"/>		<input type="text" value="3"/>
CommissionOverview - UOM	<input type="text" value="UOM"/>	<input checked="" type="checkbox"/>		<input type="text" value="25"/>

Click "Reload Fields" to synchronize Field scroll items with the query definition

* Required Field
Reload Fields

Configure Commission Overview - Query Setup page

Output/Criteria Name	Select the predefined query that you want the Participant UI Framework to use to construct the My Commission and Subordinates' Commission pages at runtime. At runtime, the Participant UI Framework executes the query, combines the results with an hierarchical view of the compensation structure, and displays this information on the My Commission and Subordinates' Commission pages.
Description	Displays the fields from the selected predefined query.
Attribute Label	Displays the attribute label of the fields from the selected predefined query. Modify the labels if necessary. The Participant UI Framework displays these attribute labels for the visible fields on the My Commission and Subordinates' Commission pages at runtime.
Visible	Select this options to display the field as a data element on the My Commission and Subordinates' Commission pages.
Show Total	Select this option for the Participant UI Framework to calculate the grand total of the query results for one of the numeric fields and display that total at the top and bottom of the My Commission and Subordinates' Commission pages. You can only designate one numeric field as a totaling field.
Order of Appearance	Select the vertical order that you want the fields and their query results to display on the My Commission and Subordinates' Commission pages.
Reload Fields	Select this button to reload the fields to their default settings, as specified in the predefined query definition.

Setting Up Problem Reporting

While viewing their incentive compensation information, participants can use the Sales Incentive Management problem reporting functionality to automatically create an email pre-populated with information. This enables participants to initiate a discussion with the specific compensation administrator associated with the business unit of a compensation structure's root node.

In addition to populating the email with transaction information, problem reporting functionality can automatically address the email to the compensation administrator assigned to the node and pre-populate the participant's email address. For the email to be automatically addressed to the compensation structure's administrator and the participant's email address to pre-populate, confirm that the following is configured:

- A user ID exists in the Default Comp Administrator field of the business unit (root) node of the Compensation Structure on the Maintain Territory page.

Select Compensation, Sales Incentives, Sales Incentives Define Sales Org Structure, Maintain Comp Structure.

- A participant's email address exists for the unique participant ID on the Maintain Sales Person page.

Select Compensation, Sales Incentives, Maintain Sales Org Structure, Sales Participants.

- A participant's email address information has been entered for their unique user ID on the Email Address page of the PeopleTools-User Profile component.

Select PeopleTools, Security, User Profiles, User Profiles, General. Click the Edit Email Addresses link.

Note. The system first searches for the participant's email address on the participant record. If the system does not find an address here, it uses the email address from the participant's user ID.

See Also

[Chapter 13, "Working with Compensation Structures," page 289](#)

[Chapter 6, "Setting Up Security," Defining Participant Security Access, page 148](#)

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[Chapter 20, "Managing the Participant Reporting Interfaces," Setting Up Problem Reporting, page 449](#)

[Chapter 5, "Managing User Interaction Objects," Defining Query Sections, page 116](#)

Setting Up the Participant Search Utility

To set up the Search Utility tool, use the Participant Query Groups component (EI_PART_QRY_DTL).

This section discusses how to set up the Participant Search utility.

Understanding the Participant Search Utility

The Participant Search utility is a simplified version of Query Builder that enables participants to search on data in the Sales Incentive Management system by querying metadata objects that have been defined in the object catalog.

Participant queries are what the Participant Search utility uses as a basis for participants to perform specific searches. A participant query is a predefined query that is specifically meant for participant use with the Participant Search utility. A predefined query itself is a stored combination of output fields and query criteria within Query Builder. Participant queries set the scope of objects and object attributes on which participants can search. By understanding how the metadata objects in the object catalog relate to each other, proficient system users (such as compensation administrators and IT personnel) can create robust participant queries based on Query Builder query definitions that enable participants to search the system for relevant information without exposing the participants to the complexity of the system.

For participants to be able to use the Participant Search utility, you must complete the following setup tasks:

1. Create participant queries in Query Builder component for the participants to use.

Save these queries as *participant query* query types on the Query Def page. Rather than creating participant queries, you can also use the participant queries that Sales Incentive Management delivers. Whether you create your own participant queries or select from the delivered ones, you can use the Predefined Queries page to review all of your predefined queries and results.

2. Define participant query groups for the participant query through the Participant Query Groups component.

Participant query groups establish the field level security of a participant query for one or more user roles. Within each group, you define which roles have access to a particular participant query and which fields within the query that each role has access to see, filter through, and search upon.

3. (*Accessing Search Utility tool from My Sales Compensation page*) Assign the Search Utility UIO to a UIO group.

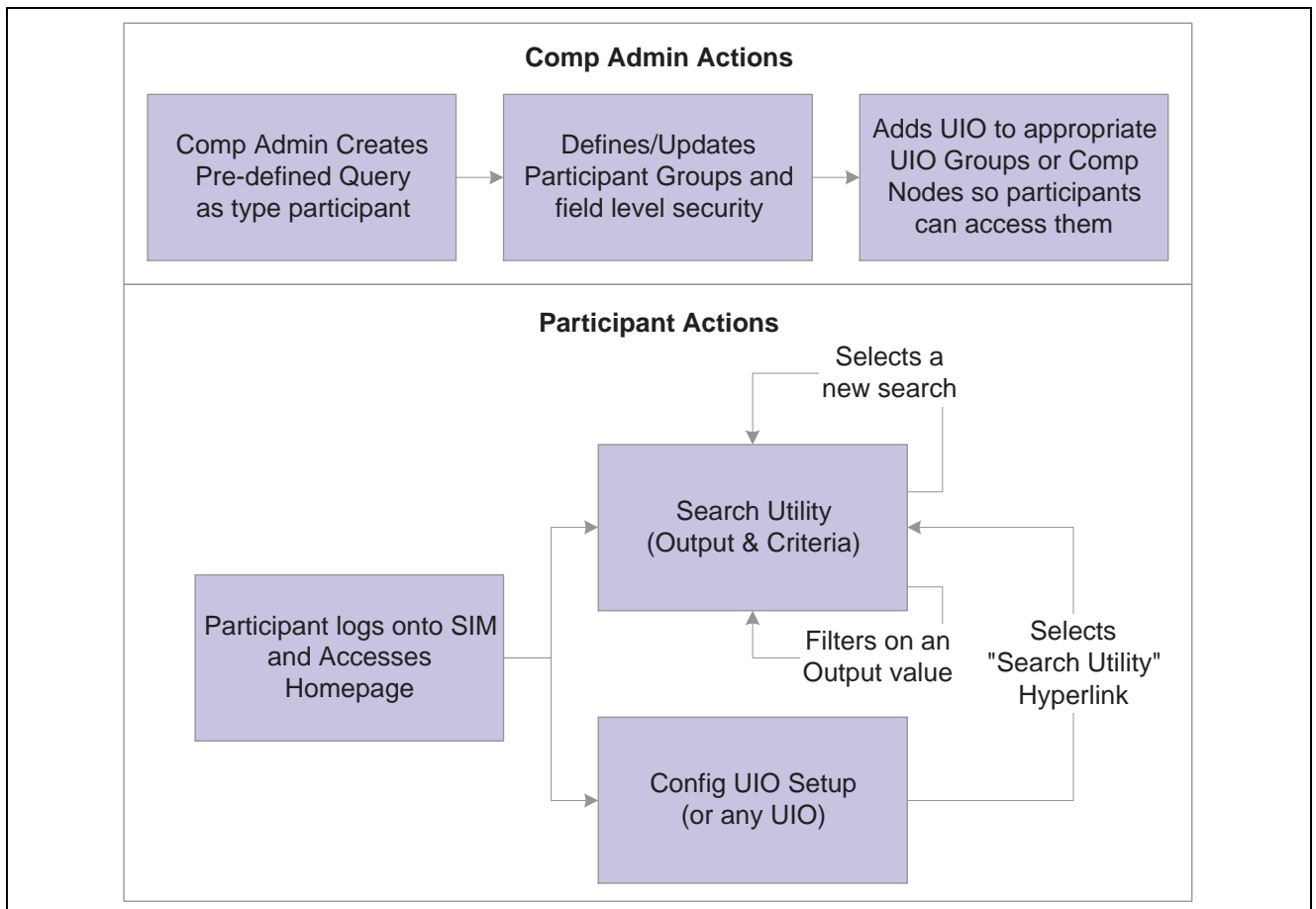
Participants who are assigned to this UIO group on a compensation structure node can thus access the search utility and participant queries through the Search Utility link that displays on their My Sales Compensation page.

4. (*Accessing Search Utility from a configurable UIO*) Specify in the configurable UIO definition whether you want to include a Search Utility link in the footer of specific pages within the definition.

You can set up participant queries any time you think that there is metadata objects related to participants that might be of particular interest to the participants. For example, you might create a participant query for participants to search on fields in the Orders tables that you deem important. The participant query itself should contain all of the fields that you might want to use for the various participant query groups that you create. When defining the related participant query groups, you can modify the participant query for particular roles so that participants in a specific role have access to search for data on only the fields that you permit them to search upon. Unlike other predefined UIOs which utilizes As of Date setting from the Commission Overview component or the participant's main My Sales Compensation page, the participant query executes as of today's date.

Although compensation administrators and IT personnel establish the participant queries and groups and associate them with the appropriate participants, participants also have some ability to control and manipulate the queries to achieve the desired search results. Participants can filter their search on the various fields associated with their role to narrow the search results. By finding the specific information they need, participants can better understand their transaction data and compensation plan participation. Participants can also save these query modifications for their own personal future use and refer back to these saved queries at any time.

This diagram illustrates the process flow for the Participant Search utility for both compensation administrators and participants:



Participant Search utility process flow

Sales Incentive Management delivers the following predefined participant queries for use with the Participant Search utility:

Description	Output/Criteria Combination	Original Class ID	Usage
My Transaction Details	EQRY_SU_RTEX_DTL	RTEX	Displays participant orders for a particular context.
Customer Information	EQRY_SU_CUSTOMERS	CUST	Displays all the customers that are part of the metadata object catalog regardless of a participant's context.
Product Information	EQRY_SU_PRODUCTINFO	PROD	Displays all the products that are part of the metadata object catalog regardless of a participant's context.

Description	Output/Criteria Combination	Original Class ID	Usage
My Salespeoples Order Details	EQRY_SU_SUB_ORDERS	XSCR	Displays all subordinates and their orders for a particular manager.
My Sales Team	EQRY_SU_MYTEAM	XSCR	Displays all the participants who report to a manager and participant information such as years of service, job code, and so on.

See Also

[Chapter 19, “Using Query Builder,” page 425](#)

[Chapter 20, “Managing the Participant Reporting Interfaces,” Using the Participant Search Utility, page 464](#)

Pages Used to Set Up the Participant Search Utility

Page Name	Object Name	Navigation	Usage
Query Def (query definition)	EQRY_COMBO_SAVE_PG	Compensation, Sales Incentives, Query Builder, Query Def	Save the current query or load a predefined query. See Chapter 19, “Using Query Builder,” Saving Query Definitions, page 432 .
Participant Query Groups	EI_PART_QRY_DTL	<ul style="list-style-type: none"> Compensation, Sales Incentives, Define Sales Incentive Options, Participant Query Groups, Participant Query Groups Click the Modify Participant Groups link on the Query Def page. 	Define participant query groups to establish the field level security of a participant query according to user roles.

Defining Participant Query Groups

Access the Participant Query Groups page.

Participant Query Groups

Participant Query EQR_Y_SU_CUSTOMERS

User Group Details View All First 1 of 1 Last

***User Group Name** + -

Roles First 1-8 of 8 Last

	Role ID		
1	MANAGER1		+ -
2	MANAGER2		+ -
3	PART		+ -
4	REGIONMGR1		+ -
5	REGIONMGR2		+ -
6	SALES_VP		+ -
7	SALESREP1		+ -
8	SALESREP2		+ -

Fields from Participant Query First 1-8 of 8 Last

	Object Type	Selected Attributes	Criteria Field Defaults	Output Field
1	CUST	CITY	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	CUST	CUSTOMER_TYPE	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	CUST	EIM_KEY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	CUST	EIM_KEY_IND	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5	CUST	GLOBAL_FLAG	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6	CUST	NAME1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	CUST	POSTAL	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8	CUST	STATE	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Re-synchronize fields

Bulk Update Fields

☐ **Criteria Field Defaults** ☐ **Output Field**

Select All Deselect All

Participant Query Groups page

You can define as many participant query groups as necessary, establishing different field level security for each group that uses the participant query through the Participant Search utility. For example, you can create a group consisting of only manager roles to grant manager access to additional output fields beyond those accessible by participants.

User Group Name	Assign a name to each of the user groups that you define for this participant query.
Role ID	Select the roles that you want to include in the group for this participant query. For the specified group, the system maps these roles to the participant query field settings in the Fields from Participant Query group box. If you need to specify different fields settings for different roles, create a group for each variant. For a particular participant query, you can assign a role to one group only. By assigning participants to roles and roles to groups, you establish field level security for the participant query.
Object Type and Selected Attributes	The system displays the derived class object ID and attributes of the fields that you have included in the participant query.
Criteria Field Defaults	Select the fields that you want to appear by default in the Advanced Search section of the Search Utility page for participants in this group.

Output Field	Select the output fields that you want the system to display in the search results on the Search Utility page for participants in this group. Note that if a predefined participant query has a Context attribute and you list it as an output field in a participant query group, the Participant Search utility automatically searches on the current context value.
Re-synchronize Fields	Click this button to re-synchronize the fields in this group with the fields from the participant query. This feature is useful if the predefined participant query changes because it adds any new fields on found on the participant query and delete the fields that are no longer applicable.
Criteria Field Defaults	Select this check box to update the Criteria Field Defaults field value for all attributes listed in the Fields from Participant Query group box. Then select either the Select All check box or the Deselect All check box to perform the update.
Output Field	Select this check box to update the Output Field field value for all attributes listed in the Fields from Participant Query group box. Then select either the Select All check box or the Deselect All check box to perform the update.

Using Reporting Infrastructure Engines

The Sales Incentive Management reporting infrastructure engine is the mechanism used to replicate incentive calculation results and generate reporting information from the reporting tables. During incentive plan processing, a job step from the job definition invokes the engine. Replication engine uses EIM metadata and Query Builder API to extract report-worthy data from production tables in to various reporting tables. Using the reporting tables as a data source, these reporting engines invoke and generate instances of reports for each participant, plan, period, and run context. The reporting engines store these report instances in a report instance table, along with report details, as part of the publishing process. The system uses these report instances when generating participant UI reports. Note that there is a one-to-one relationship between a report instance and a report.

Sales Incentive Management delivers reporting engines as individual engine processing steps. To use reporting engines you must include reporting engines in the job definition.

By completing these tasks, the reporting engines then have the same plan, period, and run context as any other engines that you define for the particular plan. The reporting engines also have access to the metadata objects within these contexts.

Sales Incentive Management delivers specific reporting engines for use in job processing and incentive plan definitions. There are two types of reporting engines: bulk replication engine and specific-purpose reporting engines.

Bulk replication engines are engines based on run context that populate reporting tables with compensation results data from production tables. More specifically, bulk replication engines mine data from source objects—variables, transaction objects, compensation structure, reference objects, and participant objects—and replicate that data into target objects in the reporting tables, according to the run context of the SIM job execution. The bulk replication engine is associated with the EI_BREPL job, which is part of the Bulk Replication (BULK_REPL) step definition.

Important! You must include replication step before any of reporting steps when defining an SIM job since replication step populates the needed reporting tables by reporting steps with data from production tables.

Specific-purpose reporting engines generate batch reports, publish or unpublish them, and make them viewable or not viewable to participants. Sales Incentive Management delivers the following specific-purpose reporting engines:

- **PrepareReport:** This engine prepares report instances for the UIO - Report derived class.

These instances are first initialized to not viewable—both the *VIEWABLE* attribute and *PUBLISHED* attribute are set to *False*. PrepareReport then creates process requests to launch Crystal report generation for each report instance that is marked “batch.” PrepareReport also creates report instances for reports marked for “ad-hoc” mode. Based on the mode selected, the PrepareReport engine schedules the process request in incremental or full refresh mode (as an asynchronous process). During PrepareReport processing, the report instance stores the URL and process instance of the generated report. As soon as reports are generated successfully, PUBLISHED flag will be set to true.

The PrepareReport engine is associated with the EI_BRPTG job, which is part of the Prepare Reporting step definition (B_PREP_R_F for full refresh B_PREP_R_I for incremental mode).

- **PublishReport:** PublishReport makes the reports available at the report instance level.

This engine first goes through each report instance and checks PeopleTools metadata for the status of the reports. If the status indicates that a particular report has been successfully generated, this engine activates the *PUBLISHED* attribute for that report. PublishReport also uses an asynchronous process to populate the URL attribute with the correct URL of the report and process instance. PublishReport has a counterpart called UnPublishReport, which makes report instances unpublished.

The PublishReport engine is associated with the EI_BRPTG job, which is part of the Publish Report (B_PUB_R) step definition.

- **ReleaseReport:** After the system makes report instances published and available, ReleaseReport enables report publication to participants.

During processing, PublishReport goes through the instances and sets the *VIEWABLE* attribute to *True* only if the instance of *PUBLISHED* attribute is already set to *True*. The participant UI checks for these attributes to determine whether to display or hide certain reports. ReleaseReport has a counterpart called UndoReleaseReport. UndoReleaseReport sets the *VIEWABLE* attribute to *False*, which prohibits the participant UI from displaying the reports.

The PublishReport engine is associated with the EI_BRPTG job, which is part of the Release Report (B_REL_R) step definition.

See Also

[Chapter 7, “Setting Up Engine Processing,” page 151](#)

[Chapter 18, “Processing Incentive Transactions,” Defining Jobs, page 372](#)

[Chapter 15, “Defining Plan Templates,” Defining a Plan Template, page 320](#)

Reviewing Participant Sales Compensation Information

Sales Incentive Management web pages and reports are primarily self-service inquiry pages. They enable the participant to view compensation information published by compensation administrators, and to perform certain limited tasks with this information.

This section discusses how to:

- Review a commission overview.

- View subordinates' commission.
- View the My Sales Compensation page.
- View the configurable participant UI pages.
- Report general problems.
- Use the Participant Search utility.
- Review reports.

See Also

Chapter 5, “Managing User Interaction Objects,” Constructing Configurable UIOs, page 101

Pages Used to Review Participant Reporting Information

Page Name	Object Name	Navigation	Usage
My Commission	EI_PART_UI_TS	Sales, Commission Overview	Participants and managers can select, as of a specific date, the compensation structure territory for which to view sales incentive data for themselves or their subordinates.
Subordinates' Commission	EI_PART_UI_VS	Sales, Commission Overview, Subordinates' Commission	Managers can view a summary of their subordinates' incentive transaction data for the period specified on the My Commission page and access My Sales Compensation page for each of their subordinates.
My Sales Compensation,	EI_PART_UI_HM	<ul style="list-style-type: none"> • Sales, Commission Overview • Click the link for the territory that you want to view. 	Participants and managers can use this page to access their or their subordinates incentive compensation information from a central location.
Participant UI Framework Query UIO	EI_PUF_QRY_UIO_PG	Click a link for a configurable UIO on the My Sales Compensation page.	The Participant UI Framework constructs and displays pages to participants according to the configurable UIO definitions as defined in the User Interaction - Configurable component. All details of the page derive from the definition. This Participant UI Framework uses this same page to construct pages for all configurable UIOs.

Page Name	Object Name	Navigation	Usage
Select Another Period,	EI_PUF_PRD_SELECT	Click the Select Another Period link on the Compensation Snapshot page.	Select another fiscal period's compensation information for review.
Problem Reporting	EI_GEN_PROB_RPTNG	Click the General Problem Reporting link on the My Sales Compensation page.	Participants can initiate a email discussion with the specific compensation administrator associated with the business unit of a compensation structure's root node to report problems or discrepancies with their compensation information.
Search Utility	EI_SRCH_UTILITY	Participants click the Search Utility link on the My Sales Compensation page or on a participant UI page based on a configurable UIO.	Participants can perform basic and advanced searched based on predefined participant queries.
Save Query	EQRY_PART_SAVE_PG	<ul style="list-style-type: none"> Click the Save Criteria for this Search link on the Search Utility page. Click the Rename Saved Search link on the Search Utility page. 	Participants can save, rename, or delete saved searches that they create from participant queries. Participants can also select whether they want to use this saved search as the default query whenever they access the Search Utility page.
View Subordinates Plan Summary	EI_MGR_SOPLN_SUM	Participants can click the Subordinate Plan Summary link on the My Sales Compensation page.	Shows a summary of plans for subordinates by participant and tree node. Authorized managers with security access can click the name of the plan to view plan details.

Reviewing a Commission Overview

Access the My Commission page.

My Commission

UIO,TC1

As Of

05/01/2009

Print

Select the link for which you want to view sales compensation information. You may need to minimize the left hand navigation to view all your information.

UIO Compensation Structure Total:

50.00 USD

UIO Compensation Structure

Chicago

Engineers

Relationship

Plan

Performance Measure

Commission

Total

0

San Jose

Executives

Relationship

Plan

Performance Measure

Commission

Executives

UIO Plan

New Accounts

50.00 USD

Total

50.00 USD

UIO Compensation Structure Total:

50.00 USD

My Commission page

Participants can use this page to view an hierarchical summary of incentive transaction data for all territories and plans to which they are assigned. For each territory, the system groups this data by relationship, plan, and performance measure. The incentive data summarized on this page is specific to a period based on the specified as of date. Participants can select a specific as of date to display the desired incentive data, and then compare the performance results across all their territories for the selected period. They can also select the Print button to launch their browser's Print dialog box and print their commission overview. The system displays commission totals for each plan and a grand totals for all plans by territory. The links enable participants to access their main My Sales Compensation page. Participants can access their main My Sales Compensation page even if they do not have result data.

Compensation administrators and IT personnel can configure this page through the Configure Commission Overview – Query Setup page. On the setup page, they can specify the predefined query that the Participant UI Framework uses to render the My Commission page, the visible fields, and the field descriptions. The Participant UI Framework generates the compensation structure hierarchy at runtime. The Participant UI Framework is integrated with EIM security so that participants only see the nodes and data for which they have been granted access.

This page supports the display of multiple contexts for the same plan, node, participant, and role attributes by distinguishing them through the relationship description. For example, a participant might be on the Asia Pacific node twice—once for product sales and once for services sales.

Viewing Subordinates' Commission

Access the Subordinates' Commission page.

Relationship	Participant Name	Commission
Executives	UIO,TC1	50.00 USD
Executives	UIO,TC2	60.00 USD
Managers	UIO,TC3	70.00 USD
Managers	UIO,TC4	85.00 USD

Subordinates' Commission page

Managers can use this page to view a list of all of their direct and indirect subordinates and examine a summary of their incentive transaction data for each node of a compensation structure. Managers can also select the Print button to launch their browser's Print dialog box and print their summary of subordinates commission data. The Participant UI Framework displays a hierarchical view of the compensation structure and their authorized subordinates (as defined by the compensation structure) along with links to each of the subordinates main My Sales Compensation pages. A manager that has been granted access to view an individual's data at any level on the compensation structure (subsequent to EIM Security being run) can access this page.

Compensation administrators and IT personnel can configure this page through the Configure View Subordinates - Query Setup page. On the setup page, they can specify the predefined query that the Participant UI Framework uses to render the Subordinates' Commission page, the visible fields, and the field descriptions. The Participant UI Framework generates the compensation structure hierarchy at runtime. The predefined query shows Relationship, Participant, Commission Amount, and Unit of Measure columns on this page. Relationship distinguishes multiple contexts of the same node, participant, and plan attributes.

Viewing the My Sales Compensation Page

Access the My Sales Compensation page.



My Sales Compensation page

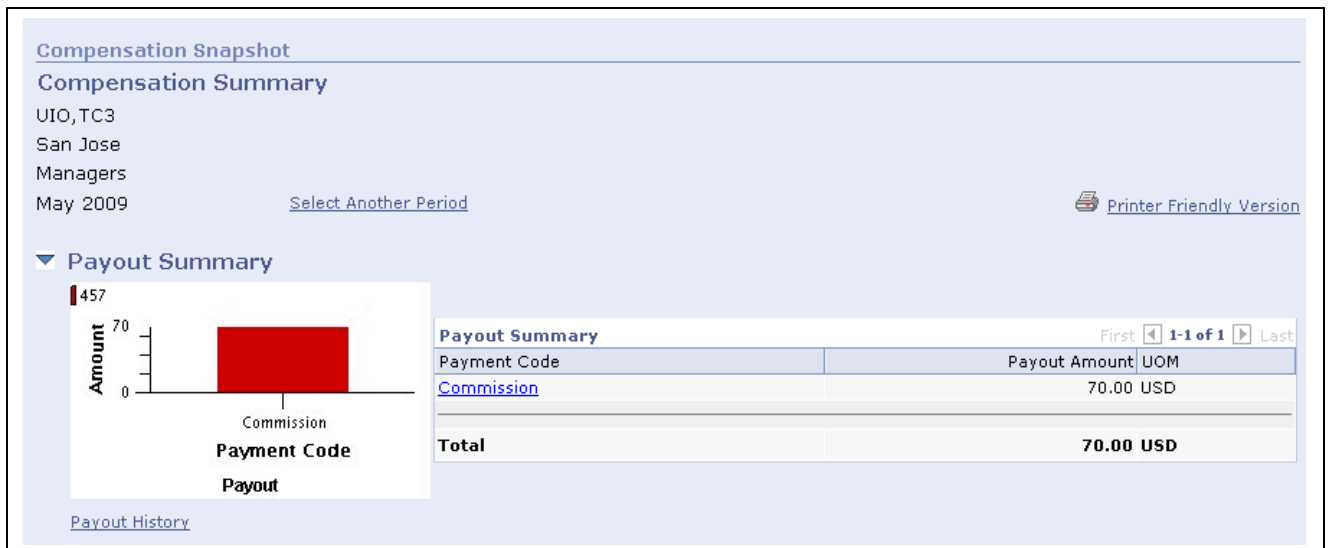
This page is a central dashboard for participants to navigate to various parts of the application. Participants can access PIA pages, Crystal reports, and participant UI pages based on configurable UIOs. The system constructs this page at runtime based on the participant's UIO group assignments and the participant's access, as defined on the compensation structure. Participants can use this page to access all areas of the application for which they have access, including PIA pages, Crystal reports, and participant UI pages based on configurable UIO definitions. Participants can use the As of Date field to select the period for which they want to view information, toggling back and forth between the current period and any past periods.

See Also

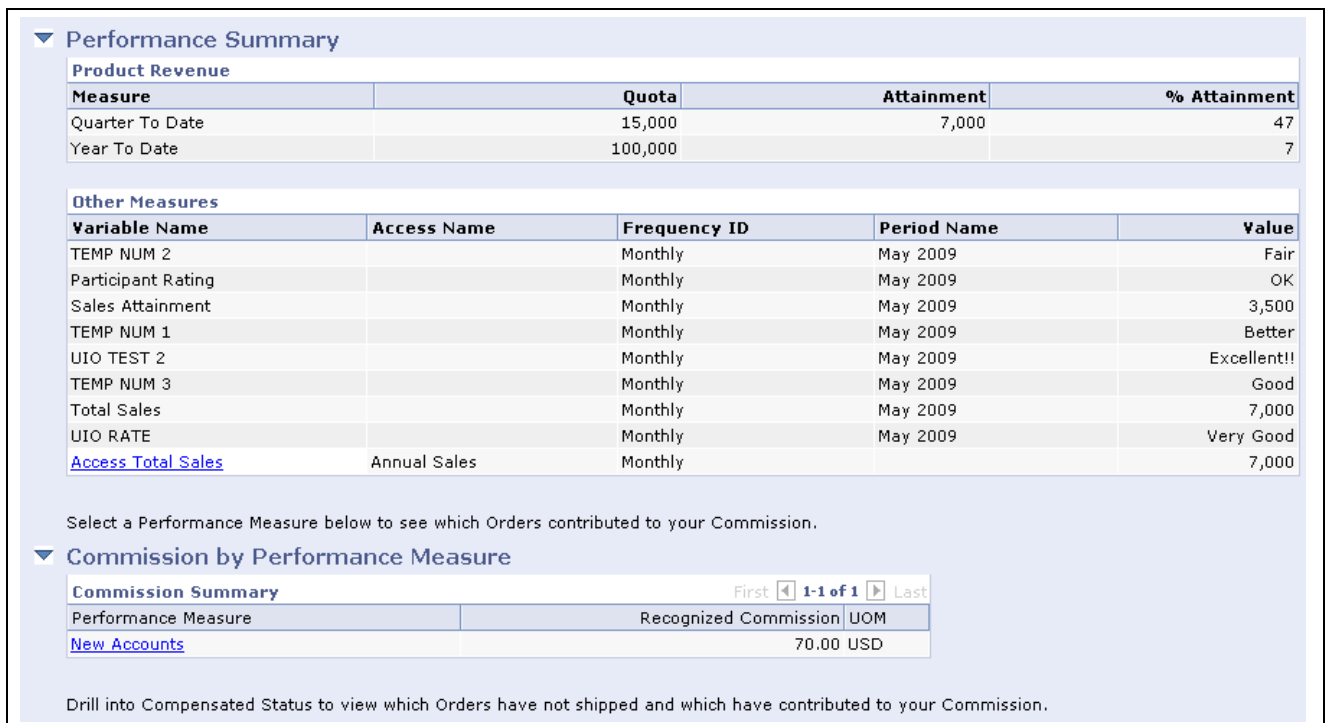
[Chapter 20, "Managing the Participant Reporting Interfaces," Reviewing Participant Sales Compensation Information, page 455](#)

Viewing the Configurable Participant UI Pages

Access the Participant UI Framework Query UIO page. This page is a participant UI page based on a configurable UIO definition, such as the Compensation Snapshot - Compensation Summary page, the BCM Compensation Snapshot - Compensation Summary page, or the Sales Force Snapshot - Sales Force Summary page.



Compensation Snapshot - Compensation Summary page (1 of 3)



Compensation Snapshot - Compensation Summary page (2 of 3)

Commission by Transaction Status

Commission Summary

First

1-1 of 1

Last

Commission Pending Status	Recognized Commission	UOM
Ready	70.00	USD

[Commission History](#)

Opportunity Performance

No data to display for given period

Projected Commission

Commission Summary

First

1-1 of 1

Last

Description	Projected Commission	UOM

Search:

Customer Information

Go

[Return](#)

[My Sales Compensation](#)

Compensation Snapshot - Compensation Summary page (3 of 3)

This page is an example to illustrate the Participant UI Framework Query UIO page. The Participant UI Framework determines the configurable UIO to use for one of these pages based on the participant's UIO assignments on the compensation structure, and it determines the content to display on the page based on the configurable UIO definitions. For example, the Compensation Snapshot - Compensation Summary page is based on the configurable UIO ID 6000, while the BCM Compensation Snapshot - Compensation Summary page is based on configurable UIO ID 6002.

For each section of the page, the Participant UI Framework determines the information, links, and any calculations based on the queries specified in the Sections area of the Configurable UIO - Page page. For example, in the delivered UIO ID 6000, the Payout Summary section of the Compensation Summary page specifies the predefined query EI_SI_PAYSUM_QRY. The links that appear on this page are determined by accessing the details for each of the sections of a page, as defined in the configurable UIO definition.

For any given rendition of the page, the Participant UI Framework displays information for the current fiscal period. Participants can click the Select Another Period link to select and view compensation information other than the current period. Participants can also select the Printer Friendly Version link to have the Configurable UIO Viewer reformat the current page to a page display suitable for printing. This option for a printer friendly version is available for all dynamically formatted participant UI pages. For participant UI pages based on configurable UIO definitions, you can specify whether you want to make this option available on the page.

See Also

[Chapter 5, “Managing User Interaction Objects,” Constructing Configurable UIOs, page 101](#)

[Chapter 20, “Managing the Participant Reporting Interfaces,” Understanding the Participant Reporting Interfaces, page 439](#)

Reporting General Problems

Access the Problem Reporting page.

Problem Reporting

UIO,TC3

Los Angeles (Manager)

Notification Details

***My Email**

***TO**

CC

BCC

Problem Type

Email Subject

Product Category: Sales Incentive Management
Market Template: High Tech & Industrial
Compensation Structure: UIO_COMP
Territory: Los Angeles (Manager)
Participant: TC3 (UIO,TC3)
Plan: UIO_P

***Message**

Problem Reporting page

The participant can submit an email to the compensation administrator that is pre-populated with specific transaction information. When a participant clicks the General Problem Reporting link on the My Sales Compensation page, the system prepares the email for the participant to send to the default compensation administrator specified on the Maintain Territory page for the root node of the compensation structure and automatically includes the participant's email address in the My Email field.

The system also populates the Email Subject line with default text and populates the Message text box with details about the participant. The participant can type details of the problem that she or he is reporting in the Message text box below the auto-generated text.

In the Problem Type field, participants can select from multiple value options. They can select a specific field value (such as *Incorrect Allocation Amount* or *Incorrect Credit*) to report common problems. Alternatively, they can select the generic field value of *Other* and note their particular problem in the Subject and Message fields.

When a participant clicks the Send button, the system sends the email to the recipients and logs a new record into the EI_RP_PRLOG_TBL table to keep track of each message sent by participants.

When the compensation administrator to whom the problem reporting email is sent receives the email, the compensation administrator can click a URL to access the log table page, which displays transaction data to review.

See Also

Chapter 20, “Managing the Participant Reporting Interfaces,” Setting Up Problem Reporting, page 449

Chapter 5, “Managing User Interaction Objects,” Defining Query Sections, page 116

Using the Participant Search Utility

Access the Search Utility page.

The screenshot displays the 'Search Utility' interface. At the top, it shows the user 'UIO, TC3' and the location 'Los Angeles'. A dropdown menu labeled '*Select a Search' is set to 'My Transaction Details'. Below this are three buttons: 'Save Criteria for this Search', 'Rename Saved Search', and 'Delete Saved Search'. The 'Advanced Search' section contains a table with columns 'Attribute Name', 'Operator', and 'Value'. Two rows are visible: 'Orders - Customer EIM Key' and 'Orders - Product EIM Key', both with an equals sign operator. Below the table are radio buttons for 'All conditions must be true' (selected) and 'One condition must be true'. Another set of 'Save', 'Rename', and 'Delete' buttons is present. A 'Search' button and a 'Clear Criteria' button are also shown. A checkbox for 'Default Advanced Qry Expanded' is unchecked. A message states: 'Narrow your search results by clicking on any value in the grid.' Below this is a 'Download to Excel' link. The 'My Transaction Details' section shows a table with columns: 'As Of Date', 'Customer EIM Key', 'Product EIM Key', 'Amount', 'Currency Code', 'Performance Measure', 'Quantity Ordered', and 'Ship To Postal Code'. The first row of data is: '1', '2009-06-22', '1007', '10034', '7000 USD', 'PROD_REV', and '0'. At the bottom are 'Save', 'Rename', and 'Delete' buttons. A pagination bar at the bottom right shows 'First', '1-1 of 1', and 'Last'.

Search Utility page

If participants access this page through the link on their My Sales Compensation page and there are no participant queries available to them, the system displays a message that informs them that they do not have access to any searches at this time. For participant UIs that are based on configurable UIOs, the system disables the search utility link to prevent participants from accessing the page.

Basic Search Criteria

Select a Search

Participants can select a predefined participant query based on their roles and the current context. The system immediately executes the query and

displays the results in the grid at the bottom of the page. Participants can also select personal queries that they have saved. Personal queries are participant queries in which participants modify the advanced search attributes to meet their specific search needs.

Save Criteria for this Search

Participants can save advanced search criteria to create personal queries. Click this link to access the Save Query page, where participants can name and save the personal query. The system displays these saved searches as choices in the Select a Search field.

Rename Saved Search

Click this options to access the Save Query page, where the system enables the participant to rename the saved search.

Delete Saved Search

Click this option to access the Save Query page, where the system asks participant to confirm the deletion of the saved search.

Advanced Search Criteria

Participants can use these fields to filter search results of the query.

Attribute

The system displays possible attributes with which you can filter the search results. By default, the system displays the attributes that have been selected as criteria field defaults on the Participant Query Groups page for the participant's role. Participants can add attributes to the advanced search criteria by clicking the link for a specific attribute result in the search results grid at the bottom of the page.

Operator

Select a logical operator to establish the relationship between the attributes and the values.

Value

Select a specific value for the attribute to filter the search results.

All conditions must be true or One condition must be true

Select the option to specify whether all attribute value conditions must be true or any attribute value conditions can be true.

Search

Click to execute the advance search query.

Clear Criteria

Click this option to clear the criteria from the advanced search fields.

Default Advanced Query Expanded

Select this option to display the advanced search criteria by default upon accessing the Search Utility page.

Search Results

When participant perform a search, the system displays the results of the query in the grid at the bottom of the page.

Participants can click the attribute value link to displays only the rows in the current search results that have the same attribute value. This enables participants to quickly filter down to the specific rows of data that they are interested in viewing. If the attribute is not one of the default attributes in the Advanced Search area, the system adds the attribute to that area.

Participants can also click the Download to Excel link to export their query results data to a Microsoft Excel spreadsheet.

See Also

[Chapter 20, “Managing the Participant Reporting Interfaces,” Setting Up the Participant Search Utility, page 449](#)

Viewing Subordinates Plan Summaries


Access the View Subordinates Plan Summary page.



My Sales Compensation

View Subordinates Plan Summary

UIO,TC3

Click the Plan Name Hyper Link to view the Plan Details for the person. You may need to minimize the left hand navigation to view all your information.

Customize | Find | 

First  1-3 of 3  Last

	Participant ID	Participant Name	Business Unit	Tree Name	Tree Node	Plan ID
1	TC4	UIO,TC4	UIO	UIO_COMP	WEST COAST	UIO_P
2	TC1	UIO,TC1	UIO	UIO_COMP	WEST COAST	UIO_P
3	TC2	UIO,TC2	UIO	UIO_COMP	WEST COAST	UIO_P

My Sales Compensation

View Subordinates Plan Summary page

Participants can click the <Plan Name> link to view their incentive plan details.

Reviewing Reports

Access a participant UI reports page.

Participants can click a specific report link on their main My Sales Compensation page to create new ad hoc reports for a specified period, or review existing report information.

Participant report information is discussed in Appendix A of this PeopleBook.

See Also

[Appendix A, “Sales Incentive Management Reports,” page 467](#)

APPENDIX A

Sales Incentive Management Reports

This appendix provides an overview of Sales Incentive Management reports and enables you to view summary tables of all reports.

Note. For samples of these reports, see the PDF files that are published on CD-ROM with your documentation.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Sales Incentive Management Reports: A to Z

This section lists the Sales Incentive Management reports, sorted alphabetically by report ID. The manager and participant reports are all Crystal reports. The compensation administrator reports are stored Query Builder queries, except the Compensation Analysis, Transaction Life Cycle, and Plan Summary reports, which are Crystal reports.

This section lists the delivered Sales Incentive Management reports sorted by report type.

There are five types of reports:

- Compensation administrator reports.

Compensation administrators have access to these Crystal reports through the Review Incentive Information menu.

- Participant UI Crystal reports.

These reports are based on UIO definitions as defined on the User Interaction - Reports page. These definitions include the menu, component, page and record of the run control required to run the report. They also include the process name and type for this purpose. Participants and managers have access to these reports through the Participant UI. Report availability depends on the participants or managers security access and the UIO groups to which they are assigned on their compensation structure nodes.

- Participant UI static page reports.

These reports are based on UIO definitions as defined on the User Interaction - Pages page. These definitions include the menu and component of the PIA page that the Participant UI Framework uses to determine the data that appears on the pages. Participants and managers have access to these PIA pages through the Participant UI. Page availability depends on the participants or managers security access and the UIO groups to which they are assigned on their compensation structure nodes.

- Participant UI configurable page reports.

These reports are based on configurable UIO definitions as defined on the User Interaction - Configurable page. These definitions determine how the Participant UI Framework renders all aspects of the page, including all sections, links, names, navigation, and the predefined queries that it uses to determine the data that appears on the pages. Participants and managers have access to these configurable pages through the Participant UI. UIO instance availability depends on the participants or managers security access and the UIO groups to which they are assigned on their compensation structure nodes.

- Predefined queries.

Compensation Administrators can access the query reports directly through the Pre-defined Queries component in the Review Incentive Information menu. Compensation administrators can also assign these queries to UIOs by marking these queries as Configurable type. Participants and managers can then access these queries indirectly through other reports and pages on participant UIs.

Note. Compensation administrators can also write ad-hoc queries using the Query Builder tool.

See Also

[Chapter 20, “Managing the Participant Reporting Interfaces,” page 439](#)

[Chapter 13, “Working with Compensation Structures,” page 289](#)

Compensation Administrator Reports

Report ID and Report Name	Description	Navigation	Run Control Page
EISIHCA0, ESIHCAP, ESIHCAT Compensation Analysis	A summary report that shows participants and their payouts, payment code for the current period, payment code for the prior period, and the variance. Users can sort this report by business unit, territory, or both.	Compensation, Sales Incentives, Review Incentive Information, Compensation Analysis Report	EI_SI_RUN_COMP_ANL
EI_BC_COMP_SUMMARY Compensation Summary	Displays information about the compensation amount paid for a specific period in each node of the territory. The report groups information by compensation structure and payment type.	Compensation, Sales Incentives, Review Incentive Information, Compensation Summary Report	EI_BC_COMP_SUMMARY
EI_BC_AENO_HUR Account Exec Not Met Hurdle	Displays the quota and attainment transaction details by performance measure for account executives have not met their monthly quota in a territory for a selected accounting period and fiscal year. Also displays the deficit amount.	Compensation, Sales Incentives, Review Incentive Information, Account Execs Not Met Hurdle	EI_BC_AENO_HUR

Report ID and Report Name	Description	Navigation	Run Control Page
EISIHTC0 Transaction Life Cycle	<p>This report groups transaction details, including exploded transactions, by order. This report may be generated for any fiscal year and accounting period. Transaction information such as Payee, Transaction Type, Current Transaction State, Credit Date/Amount, Comp Date/Amount, Published, and Posted Flags are displayed to facilitate reconciliation of orders flowing through the Sales Incentive Management system.</p> <p>This report is a Crystal report.</p>	Compensation, Sales Incentives, Review Incentive Information, Transaction Life Cycle Report	EI_SI_RUN_TRANSACT
EI_BC_AETW_HUR Account Exec Met Twice Hurdle	Displays the quota and attainment transaction details by performance measure for account executives who have attained twice their quota in a territory for a selected accounting period and fiscal year. Also displays the surplus amount.	Compensation, Sales Incentives, Review Incentive Information, Account Executive Twice Hurdle	EI_BC_AETW_HUR
EI_BC_ASSET Asset Growth	Shows a selected participant's assigned quota, total attainment, and percent achieved in each assigned territories for the growth of Assets Under Management (AUM). This report displays data based on performance measure and frequency.	Compensation, Sales Incentives, Review Incentive Information, Asset Growth Report	EI_BC_ASSET EI_BC_ASSET
EISIHCPM, ESIHCPP Plan Summary	Displays the participants that appear on plans, participant quotas per plan, performance measure, and whether the quotas are reportable. If the variable has an override, the amount is shown. The report also shows the reference variable name and the initial value. The report is organized by all plans within a business unit. A calculated field sums the number of participants per plan. An optional prompt is provided in the run control for plan ID to generate a report for a specific plan.	Compensation, Sales Incentives, Review Incentive Information, Plan Summary Report	EI_SI_RUN_CA_PLAN

Report ID and Report Name	Description	Navigation	Run Control Page
EI_BC_YTDSALES Investment Rep Sales Ranking	Displays the top 100 sales representatives and their ranking within a region or territory according to year-to-date sales amount of all products for the selected period.	Compensation, Sales Incentives, Review Incentive Information, Investment Rep sales Ranking	EI_BC_YTDSALES

Participant UI Crystal Reports

Report ID and Report Name	Description	Navigation	Run Control Page
EISIHCP0 Participant Commission Statement	Shows commission credit for a participant (transactions that are used as credit for a commission). This report includes detailed <i>Transaction/Credit Information</i> and <i>Summary Information</i> sections, and a <i>Bonus</i> section for bonus period payouts. This Crystal report is based on the UIO ID 4500 (Commission Statement) as defined on the User Interaction - Reports page.	Click the Commission Statement link on the My Sales Compensation page.	EI_SI_RUN_PAR_COMM
EISIHCR0 Credits Report	This report shows information about participant credits for a given period context, including information from the following fields: Order Number, Credit Event, Customer Name, Product Name, Number of Units, Revenue Amount, Credit Split Percentage, Credit Amount, Performance Measure, and Status (<i>Earned</i> , <i>Pending</i> , or <i>Paid</i>). This Crystal report is based on UIO ID 4501 (Credits Report) as defined on the User Interaction - Reports page.	Click the Credits Report link on the My Sales Compensation page.	EI_SI_RUN_CREDIT_RT

Report ID and Report Name	Description	Navigation	Run Control Page
EISIHCM0 Sales Force Commission Statement	Shows commission credit for a manager, summarizing and grouping commission data by reporting regions and salespeople. Report includes detailed <i>Transaction/Credit Information</i> and <i>Summary Information</i> sections, and a <i>Bonus</i> section for bonus period payouts. This Crystal report is based on the UIO ID 4502 (Sales Force Commission Statement) as defined on the User Interaction - Reports page.	Click the Sales Force Commission Stmt link under Manager Reports on the My Sales Compensation page.	EI_SI_RUN_MGR_COMM
EISIHIC0 Indirect Credits Report	Lists all indirect credits received by the manager from participants who do not directly report to that manager. This statement includes details of base amount, credit amount, credit rate, compensation rate, payout amount, and contributing participant information. This Crystal report is based on the UIO ID 4504 (Indirect Credits Report) as defined on the User Interaction - Reports page.	Click the Indirect Credits Report link on the My Sales Compensation page.	EI_SI_RUN_INDCR_RT
EISIHUC0 Manager Unpaid Credits Report	Lists all the credits for which payout has not been made to the manager, including credits held for calculations and credits held for payments. For a participant, this report shows the same information for the participant. This Crystal report is based on the UIO ID 4505 (Manager Unpaid Credits Report) as defined on the User Interaction - Reports page.	Click the Manager Unpaid Credits Report link on the My Sales Compensation page.	EI_SI_RUN_UPCRD_RT

Report ID and Report Name	Description	Navigation	Run Control Page
EISIHUCP Participant Unpaid Credits	<p>Lists all the credits for which payout has not been made to the participant, including credits held for calculations and credits held for payments.</p> <p>This Crystal report is based on the UIO ID 5406 (Participant Unpaid Credits Report) as defined on the User Interaction - Reports page.</p>	Click the Participant Unpaid Credits Rpt link on the My Sales Compensation page.	EI_SI_RUN_UPCRP_RT
EISIBCP0 BCM Commission Statement	<p>This report contains three sections. The header section displays participant details such as address, the branch at which the participant is working, , and the plan associated with the selected period. The summary section displays the variables (such as quota and attainment) that are associated with performance measures, values, and frequency in an easy-to-read tabular format. This section also displays a graphical representation of the variables. The detailed section, which is the core section of the report, displays all transactions achieved by a sales participant for a selected period, grouped by performance measure. Details include account number, product, customer, commission rate, and commission amount.</p> <p>This Crystal report is based on the UIO ID 5407 (BCM Commission Statement) as defined on the User Interaction - Reports page.</p>	Click the BCM Commission Statement link on the My Sales Compensation page.	EI_BC_PAR_COMM

Report ID and Report Name	Description	Navigation	Run Control Page
EISIBCM0 BCM Manager Commission Statement	<p>This report contains three sections. The header section displays participant details such as address, the branch at which the manager is working, , and the plan associated with the selected period. The summary section displays the variables (such as quota and attainment) that are associated with performance measures, values, and frequency in an easy-to-read tabular format. This section also displays a graphical representation of the variables. The detailed section, which is the core section of the report, displays all transactions achieved by managers for a selected period, grouped by performance measure. Details include subordinate, account number, product, customer, commission rate, and commission amount.</p> <p>This Crystal report is based on the UIO ID 5408 (BCM Manager Commission Statement) as defined on the User Interaction - Reports page.</p>	Click the BCM MGR Commission Statement link on the My Sales Compensation page.	EI_BC_MGR_COMM

Participant UI Static Page Reports

Report ID and Report Name	Description	Navigation	Run Control Page
2000 Compensation Snapshot	(Inactive) View your attainment and commission information, allocated and credited transactions, and pending payments.	Click the Compensation Snapshot link on the My Sales Compensation page.	EI_SI_DS_SS
3000 Projected Snapshot	(Inactive) View your projected attainment and commission information, allocated and credited transactions, and pending payments.	Click the Projected Compensation link on the My Sales Compensation page.	EI_SI_DS_PC

Report ID and Report Name	Description	Navigation	Run Control Page
4000 Sales Force	(Inactive) View sales force performance (attainment and commission, allocated and credited transactions, and pending payments) and plan summary.	Click the Sales Force link on the My Sales Compensation page.	EI_SI_DS_SF
5000 General Problem Reporting	Participants can initiate an email discussion with the specific compensation administrator associated with the business unit of a compensation structure's root node to report problems or discrepancies with their compensation information.	Click the General Problem Reporting link on the My Sales Compensation page.	EI_GEN_PROB_RPTNG
6800 Search Utility	Participants can perform basic and advanced searched based on predefined participant queries.	Click the Search Utility link on the My Sales Compensation page.	EI_SRCH_UTILITY
6900 View Subordinates Plan Summary	Shows a summary of plans for subordinates by participant and tree node. Authorized managers with security access can click the name of the plan to view plan details.	Click the Subordinate Plan Summary link on the My Sales Compensation page.	EI_MGR_SOPLN_SUM

Participant UI Configurable Page Reports

Report ID and Report Name	Description	Navigation	Run Control Page
6000 Compensation Snapshot	Contains the following pages of information for participants according to the selected context and period: Compensation Summary (shows payout summary, including many sections and links to other pages), Payout Details (shows payout details for a specific payout), Payout History (shows a history of all payouts grouped by both period name or payout code), Commission Details (shows line details for orders by performance measure), Commission History (shows a commission summary history by period and by performance measure), Opportunity Details (displays transactions for CRM opportunities), Order Summary (shows orders by performance measure including link to the Commission Details page), and Order Summary (Release/Held) (shows summary of commission details for orders in release/held status including link to the Commission Details page).	Click the Compensation Snapshot link on the My Sales Compensation page.	EI_PUF_QRY_UIO_PG

Report ID and Report Name	Description	Navigation	Run Control Page
6002 BCM Compensation Snapshot	<p>Consolidates and reports the participant's compensation summary, high-level calculation details, and the BCM-specific transactions that the system processed and used to calculate the compensation.</p> <p>Contains the following pages of information for participants according to the selected context and period:</p> <ol style="list-style-type: none"> 1. Compensation Summary: Shows the participant's payout summary by payment code, performance summary, commission by performance measure, and opportunity performance. 2. Payout Details: Shows BCM-specific transactions, grouped by transaction type, that the system processed and used to calculate the commission. 3. Payout History: Shows a history of all payouts grouped by both period name or payout code. 4. Commission Details: Shows line details for BCM transactions by performance measure. 5. Commission History: Shows a commission summary history by period and by performance measure. 	Click the Compensation Snapshot link on the My Sales Compensation page.	EI_PUF_QRY_UIO_PG

Report ID and Report Name	Description	Navigation	Run Control Page
6500 Sales Force Snapshot - Sales Force Summary	Shows the performance summary quarter-to-date and year-to-date for all of a manager's subordinates, including quota and attainment values and percentage. Also shows a summary of performance as defined by the performance measures associated with plan variables. Also shows a summary of commission for subordinates.	Click the Sales Force Snapshot link on the My Sales Compensation page.	EI_PUF_QRY_UIO_PG
7000 Compliance Review	Shows details of compliance reviews including regulation, last reviewed date, and status.	Click the Compliance Review Report link on the My Sales Compensation page.	EI_PUF_QRY_UIO_PG
7100 Loans By Branch	Shows the loan amount, cost of the loan, and net revenue that was achieved by each territory node for the month and loan type. This reports lists loan details by loan type. The Loans Summary page on the main page shows a loan summary that includes loan amount, cost of loan, and net revenue amount. Participants can click a link for a specific loan to view the Load Details page, which displays further details about that loan.	Click the Loans By Branch Report link on the My Sales Compensation page.	EI_PUF_QRY_UIO_PG
7200 New Business Report	Shows the new business generated for a given territory in a particular calendar period for each line of business (LOB). This report includes sections that provide new business details on the retail banking, mortgages and loans, and asset investments LOBs.	Click the New Business Report link on the My Sales Compensation page.	EI_PUF_QRY_UIO_PG
7300 Product Sales Report	Shows product sales for each node in a territory according to product name and product type. Groups details by product. This report includes sections that provide product sales details on the retail banking, mortgages and loans, and asset investments LOBs.	Click the Product Sales Report link on the My Sales Compensation page.	EI_PUF_QRY_UIO_PG

Predefined Queries

Report ID and Report Name	Description	Navigation	Run Control Page
EI_BC_AOP_COM_QRY Participant Account Open	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_AOP_PAYOUT_QRY Account Opening Payout	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_ARF_PAYOUT_QRY Account Referral Payout	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_ARV_PAYOUT_QRY Account Revenue Payout	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_AUM_PAYOUT_QRY AUM Payout Query	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_BRO_INVLD_LIC Brokers Invalid License	Shows the brokers and agents who do not have a valid broker license in a particular period.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_CA_HSEHOLD_QRY Holds Enrolled in Portfolios	Households are groups of accounts. Portfolios are also groups of accounts, but can consist of households and individual accounts. This query finds the households enrolled in multiple portfolios. This query is registered for public access so that anyone can view the results generated by the query.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_CA_HSEHOLD_QRY Households Enrolled	Households are groups of accounts. Portfolios are also groups of accounts, but can consist of households and individual accounts. This query finds the households enrolled in multiple portfolios. This query is registered for private access so that only the owner can view the results of the query.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG

Report ID and Report Name	Description	Navigation	Run Control Page
EI_BC_COB_COM_QRY Participant CompObjective	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_COB_PAYOUT_QRY CompObjective Payout	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_COMREV_QRY Compliance Review	This query is used in Compliance Review configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_COMSUM_QRY Commission Summary BC	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_DDS_COM_QRY Participant Direct Deposit	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_DDS_PAYOUT_QRY Direct Deposit Payout	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_IMF_COM_QRY Participant Investment Monthly	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_IMF_PAYOUT_QRY Investment Monthly Payout	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_IVS_COM_QRY Participant Investment Sales	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_IVS_PAYOUT_QRY Investment Sales Payout	This query is used in BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_LOANSUM_QRY Loans By Branch - Summary	This query is used in Loans Summary page on the Loans By Branch configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_LON_COM_QRY Participant Loan Origination	This query is used on the Commission Details page in the BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG

Report ID and Report Name	Description	Navigation	Run Control Page
EI_BC_LON_PAYOUT_QRY Loan Origination Payout	This query is used on the Payout Details page in the BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_LONBCH_QRY Loans By Branch - Details	This query is used on Loans Details page in the Loans By Branch configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_NBUAC_QRY New Business Report - Account	This query is used in the New Business Report configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_NBUINV_QRY New Business Report-Investment	This query is used in the New Business Report configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_NEWBLN_QRY New Business Reports-Loans	This query is used in the New Business Report configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_NON_EMP_QRY Commission paid-Non Employee	Shows payments that are made to external participants who are not employees of the bank.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_PMT_COM_QRY Participant Performance Metric	This query is used on the Commission Details page in the BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_PMT_PAYOUT_QRY Participant Performance Metric	This query is used in the BCM Compensation Snapshot configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_PRDAC_QRY Product Sales Account	This query is used in the Product Sales Report configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_PRDINV_QRY Product Sales Investment	This query is used in the Product Sales Report configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_PRDLON_QRY Product Sales Loan	This query is used in the Product Sales Report configurable UIO.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_PRDPACK_QRY Product Package Summary	The query displays a summary of the products that are sold in packages.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG

Report ID and Report Name	Description	Navigation	Run Control Page
EI_BC_PRTFOLIO_QRY Portfolio Summary Transaction	Shows the revenue generated by the portfolios. This query is registered for public access so that anyone can view the results generated by the query.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_PRTFOLIO_QRY Portfolio Summary Transaction	Shows the revenue generated by the portfolios. This query is registered for private access so that only the owner can view the results of the query.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_UNALLOCATED_TX Un Allocated Transaction	Displays transactions that could not be processed (or allocated) in the current period.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_ZERO_ALLOC_QRY Zero Allocation Query	Shows the participants who do not have allocated transactions in the specified period.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_ZERO_COM_QRY Zero Commission	Shows the participants who have earned zero commission.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_BC_ZERO_CREDIT_QR Zero Credits	Shows the participants who have earned zero credits.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_CA_ACCRUAL_QRY Accrual	Shows credits that have been earned, but not yet paid for the purpose of booking a future liability against a company's books.	Compensation, Sales Incentives, Review Incentive Information, Pre-Defined Queries	EQRY_VIEWER_PG
EI_CA_CRDT_SPLIT_ADT Credit Split Audit	Shows current information on who has received credit for orders.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_CA_CREDIT_SUM_QRY Credit Summary	Shows total credit earned by participants, grouped by order.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_CA_DRAW_QRY Draw Search	Shows a participant's draw information: amount paid, amount repaid, and balance.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_CA_JRNL_ADJS_QRY Credit and Payout Adjustments	Shows detail listing of all payout and credit adjustments made for participants in a given period.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG

Report ID and Report Name	Description	Navigation	Run Control Page
EI_CA_LEDGER_PYMTS Payments Posted to Ledger	Shows summary list of payments, by payment code, in the EIM ledger. Information for this query is derived from the ledger table.	Compensation, Sales Incentives, Review Incentive Information, Pre-Defined Queries	EQRY_VIEWER_PG
EI_CA_PSTD_TRANSX Transaction Posted to Ledger	Shows detail list of transactions that have been posted to the ledger for a given period. The sample period is January 2002. Information for this query is derived from the base transaction table.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_CA_TXN_CYCLE Transx Cycle by Order/Customer	The query display transaction life cycle by account number and customer.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_CA_UNALLOCATED_TX Unallocated Orders	Shows unallocated information, enabling the compensation administrator to correct or add needed data so that these transactions may continue in the processing cycle.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_CA_UNCREDITED_TX Uncredited Orders	Shows orders that are in the system, but have not received any credit. This report is intended to help identify adjustments or orders affected by rule changes.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_COMDTL_QRY Commission Details	Shows transactions for a performance measure.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_COMM_QRY Commission Overview Query	Shows the compensation structure territory for which to view a summary of sales incentive data according to relationship on the compensation structure.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_COMM_S_QRY View Subordinates	Shows a summary of subordinates' incentive transaction data for a period according to relationship on the compensation structure.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_COMSU2_QRY Commission Summary	Displays a summary of all the of all incentive activity for the specified period by context and currency.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG

Report ID and Report Name	Description	Navigation	Run Control Page
EI_SI_COMSUM_QRY Commission Summary Query	Displays a summary of all the of all incentive activity for the specified period by performance measure, context, and unit of measure.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_OPMVAR_QRY Opportunity PM Variable	Shows a list of variables related to projected commissions.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_OPPSUM_QRY Opportunity Sum	Shows a summary of projected commissions for CRM opportunities.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_OPPX_QRY Opportunity Transactions	Displays transactions for CRM opportunities.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_ORDSUM_QRY Order Summary	Displays a one line per order summary.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_PAY_AGG_QRY Aggregation Engine	Shows payout amounts summed by context and payment code.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_PAYDTL_QRY Payout Detail	Shows detailed payout data for a period that is specific to a performance measure.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_PAYSU2_QRY Payout Summary	Shows history of payout data across periods that is by performance measure. Includes period context.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_PAYSUM_QRY Payout Summary Query	Shows history of payout data across periods that is by performance measure. Includes payment code, period context, unit of measure, and period end date.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_PMVAR_QRY Performance Measure YesVar Query	Shows detailed list of variables by period and context.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_PTNTL_COMP_QRY Potential Compensation	Shows the sum of the commission amounts for order transactions by period and context	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EI_SI_RHLSUM_QRY Order Summary (Release/Held)	Shows detailed order data by order line in release/held status.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG

Report ID and Report Name	Description	Navigation	Run Control Page
EI_SI_SF_COMSUM_QRY Sales Force Commission Summary	Displays manager overview of performance by performance measure of their subordinates.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EQRY_SU_CUSTOMERS Customer Information	Show a list from the Customer table (independent of participant).	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EQRY_SU_MYTEAM My Sales Team	Shows all participants who report to a manager, along with information such as years of service, job code, etceteras.	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EQRY_SU_PRODUCTINFO Product Information	Shows a list from the Product table (independent of participant).	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EQRY_SU_RTEX_DTL My Transaction Details	Shows all orders for a participant (by context).	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG
EQRY_SU_SUB_ORDERS My Salespeople Order Details	Shows all orders for a manager's direct reports (by context).	Compensation, Sales Incentives, Review Incentive Information, Pre-defined Queries	EQRY_VIEWER_PG

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration,

	PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	<p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p>
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

	courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event	<p>In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.</p> <p>In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).</p>
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	<p>In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.</p> <p>In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.</p> <p>In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.</p>
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
course	<p>In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.</p> <p>See also <i>class</i>.</p>
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	<p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides

	<p>default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.</p> <p>In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.</p>
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
division	<p>In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.</p> <p>See also <i>population</i> and <i>cohort</i>.</p>
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event	<p>A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.</p> <p>In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.</p>
event propagation process	<p>In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.</p>
exception	<p>In PeopleSoft Receivables, an item that either is a deduction or is in dispute.</p>
exclusive pricing	<p>In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.</p>
fact	<p>In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.</p>
financial aid term	<p>In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.</p>
forecast item	<p>A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.</p>
fund	<p>In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.</p>
gap	<p>In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.</p>
generic process type	<p>In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.</p>
gift table	<p>In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.</p>
GL business unit	<p>Abbreviation for <i>general ledger business unit</i>. A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.</p> <p>See also <i>business unit</i>.</p>
GL entry template	<p>Abbreviation for <i>general ledger entry template</i>. In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled</p>

by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process

Abbreviation for *General Ledger Interface process*. In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group

In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

incentive object

In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.

incentive rule

In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur

In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative

In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access

In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access*.

institution

In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

item

In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle

In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.
keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the <i>SQLExec</i> function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.

national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the

	number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session	<p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry. It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.</p>
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists,

and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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