Let's Connect
EPM | CPM | CRM | Data Analytics Consulting Experts

Oracle ARCS
Creating Profile Rules "Set Attribute Value"

FINANCIALS   **WORKFORCE**   **CAPEX**   **PROJECTS**   **CRM**

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BISP

Step#1 Create New Rule.
Step#2 Select Rule Type "Set Attribute Value".

New Rule

OK   Cancel

Rule   Set Attribute Value

Description

Source   Profile

★ Attribute

★ Value

Run When   Before Profile is copied to period

◉ Create Filter   ◎ Use Saved Filter

▼ **Filter**
Filter Definition
Filter Criteria

Create Condition   Create Condition Group   Delete

Condition

Conjunction

Source

Attribute

Operand

Value

Step#3 Provide Description (Optional and Recommended).

New Rule

                                                        OK   Cancel

* Rule   `Set Attribute Value` ▾

Description   `IF Prior Period Adjustments to GL or SubSystem > -$100 Then`
                              `Update Risk Rating to HIGH`
                         `EndIF`

Step#4 Select Source "Profile" Attribute "Risk Rating"

Source   `Profile` ▾

* Attribute   `Risk Rating` ▾

* Value

Run When

- Description
- Doc No
- Enter Source System Balances
- Enter Subsystem Balances
- Historical Rate
- Instructions
- Intercompany
- Invoice
- Key Demo Account
- Maximum Age Adjustments
- Maximum Age Explanation
- Name
- Normal Balance
- Organizational Unit
- Preparer
- Process
- Rate Type
- Reviewer
- Reviewer Status
- **Risk Rating**

▾ **Filter**
  Filter Defini
    Filter Cr

Create Co

                                                         Delete

Condition
Conjunction
Source
Attribute
Operand   `Risk Rating`
Value

BISP

Note : Risk Rating is defined as System Attribute.

Step#5 Select Attribute Value Risk Rating "High"

Step#6 Run When "Before Profile is copied to Period"

Step#7 Select one of them 1) Create Filter 2) Used Saved Filter.

Create Filter in our example

⦿ Create Filter ⦾ Use Saved Filter

▼ **Filter**
   Filter Definition
      Filter Criteria

Step#8 Create Condition.

▼ **Filter**
   Filter Definition
     ▼ Filter Criteria

Create Condition	Create Condition Group	Delete

Step#9 Select Source as "Balance".

Create Condition	Create Condition Group	Delete

Condition

Conjunction [▾]

* Source [Reconciliation ▾]

    Reconciliation

* Attribute [▾]

    Balance

* Operand

    Transaction   Balance

* Value

Step#10 Select Attribute "Adjustment to Source System (Functional)

Step#11 Select Operand "Less than"
Value -100,000
Currency USD

Create Condition	Create Condition Group	Delete

Condition

Conjunction	[▾]
* Source	Balance [▾]
* Attribute	Adjustments to Source System (Functional) [▾]
* Operand	Less than [▾]
* Value	-100,000
* Currency	USD [▾]

Finally, the Filter Criteria will appear as below.

▼ **Filter**
    ▼ Filter Criteria
        Adjustments to Source System (Functional) less than -100000 USD

Step#12 Create another Condition with Conjunction as Or

▼ **Filter**

Filter Definition

▼ Filter Criteria

Adjustments to Source System (Functional) less than –100000 USD

And Name contains

| Create Condition | Create Condition Group | Delete |

Condition

* Conjunction | And ▾ |

* Source | ...iation ▾ |

And

Or

* Attribute | ▾ |

Step#13 Create Or Condition with Subsystem(Functional) as below

▼ **Filter**

Adjustments to Source System (Functional) less than –100000 USD

Or Adjustments to Subsystem (Functional) less than -100000 USD

| Create Condition | Create Condition Group | Delete |

Condition

* Conjunction | Or ▾ |

* Source | Balance ▾ |

* Period | May 2019 ▾ |

* Attribute | Adjustments to Subsystem (Functional) ▾ |

* Operand | Less than ▾ |

* Value | -100,000 |

* Currency | USD ▾ |

Final Conditional Expression is as below

▼ Filter

Adjustments to Source System (Functional) less than -100000 USD

Or Adjustments to Subsystem (Functional) less than -100000 USD

Create Condition	Create Condition Group	Delete

Condition

Conjunction	
* Source	Balance
* Period	May 2019
* Attribute	Adjustments to Source System (Functional)
* Operand	Less than
* Value	-100,000
* Currency	USD

▼ Filter

Adjustments to Source System (Functional) less than -100000 USD

Or Adjustments to Subsystem (Functional) less than -100000 USD

Create Condition	Create Condition Group	Delete

Condition

* Conjunction	Or
* Source	Balance
* Period	May 2019
* Attribute	Adjustments to Subsystem (Functional)
* Operand	Less than
* Value	-100,000
* Currency	USD

Thank You

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