Compensation Administration (v1.0)
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Course Summary 117
Course Introduction

Through discussion, demonstration, and hands-on computer lab work, this course uses the concepts and terminology associated with SuccessFactors Compensation functionality, and helps you develop a working knowledge of this functionality for use in implementing your compensation strategy. You will gain basic skills in how to use SuccessFactors Compensation as an admin, and will learn how to manage the basic tools for managing the compensation cycle in your organization.

Note: Please note that “user” refers to the user or employee.

Course Objectives and Goals

Upon completion of this course, you will be able to:

- Identify and define terminology for SuccessFactors Compensation
- Upload the User Data File (UDF) and market data into SuccessFactors Compensation
- Identify the roles and responsibilities for SuccessFactors Compensation
- Describe the relationships between compensation plan templates, compensation forms, and planning sheets
- Identify and describe compensation programs
- Edit and clone the compensation plan templates
- Create eligibility rules, budgets, and guidelines for salary, bonus, and stock programs
- Modify and manage reporting of compensation to planners and to employees
Generate compensation forms for the compensation planners
Add standard and custom fields to the salary, bonus, and stock sheets
Run compensation reports

Target Audience
This is a virtual instructor-led training course intended for administrators (admins) of SuccessFactors Compensation who are responsible for:

- Uploading data for compensation plans
- Creating and configuring compensation plan templates
- Modifying and managing reporting of compensation to planners and to employees

Course Structure
The Compensation Administration course lasts four hours and is divided into modules and lessons:

- Module 1: Getting Started with SuccessFactors Compensation
  - Lesson 1-1: SuccessFactors Compensation Overview
  - Lesson 1-2: The Compensation Process
  - Lesson 1-3: Managing User Data File (UDF)
  - Lesson 1-4: Updating Salary Pay Matrices
  - Lesson 1-5: Updating Currency Conversion Rate Tables
- Module 2: Configuring SuccessFactors Compensation
  - Lesson 2-1: Compensation Plan Template
  - Lesson 2-2: Column Designer
  - Lesson 2-3: Eligibility
  - Lesson 2-4: Guidelines
  - Lesson 2-5: Budgets
  - Lesson 2-6: Compensation Forms
Module 3: Compensation Reports and Statements
  - Lesson 3-1: Rollup Reports
  - Lesson 3-2: Exporting Aggregated Compensation Data

Training Environment

The SuccessFactors system is highly configurable. During this training, you will be working in a representative environment. It may not match your own SuccessFactors configuration at your company. To expand the browser window in Internet Explorer or Mozilla Firefox, use the F11 key.

Using this Guide

This guide is to be used in conjunction with an instructor. The guide provides general information that will be elaborated upon by the instructor.

Throughout the guide, you will encounter icons that call out various types of information. The following table illustrates how this guide uses icons to indicate different types of comments, activities, labs, etc. that support the text.

- **Note**: Indicates additional information that is related to the information presented.
- **Best Practice**: Indicates helpful hints and tips or other guidance that further explains the information it accompanies.
- **Warning**: Warns against particular actions, or that a particular condition might indicate a problem.
- **Job Aid**: Indicates there are job aids available for additional information for the task.
- **Lab**: Indicates a step-by-step, hands-on exercise that you need to complete during training that will take you through the proper process to complete the task.
Additional Resources

There are a number of additional resources that can provide you more information about the SuccessFactors system. These resources include:

- SuccessFactors website: [http://www.successfactors.com](http://www.successfactors.com)
- Online system help
- Task-specific job aids
- SuccessFactors monthly newsletter
- SuccessFactors Customer Community: [http://community.successfactors.com/](http://community.successfactors.com/)
- Customer Success Knowledgebase

For more information about other courses and registration, contact Success Academy at training@successfactors.com.
Module 1. Getting Started with SuccessFactors Compensation

In this module, you will be introduced to SuccessFactors Compensation. You will be presented with general orientation and an understanding of the data files needed from your systems to import into the Compensation module.

This module contains the following lessons:

- Lesson 1-1: SuccessFactors Compensation Overview
- Lesson 1-2: The Compensation Process
- Lesson 1-3: Managing User Data File (UDF)
- Lesson 1-4: Updating Salary Pay Matrices
- Lesson 1-5: Updating Currency Conversion Rate Tables

Objectives

Upon completion of this module, you will be able to:

- Define the terms used in SuccessFactors Compensation
- Identify the roles and responsibilities for SuccessFactors Compensation administrators
- Describe the relationships between cycles, compensation plan templates, compensation forms, and compensation programs
- List the key data files required by SuccessFactors Compensation
Lesson 1-1. SuccessFactors Compensation Overview

The goal of this lesson is to introduce you to SuccessFactors Compensation terms and definitions, roles and responsibilities, and navigation for planners and administrators.

Objectives

Upon completion of this lesson, you will be able to:

- List the two essential data files to upload into SuccessFactors Compensation
- Define the terms used in SuccessFactors Compensation
- Differentiate the admin and planner roles in SuccessFactors Compensation

Compensation Main Concepts

SuccessFactors Compensation provides Human Resource (HR) managers with a tool for communicating and reinforcing the organization's compensation philosophy and guidelines. Once implemented, it enables managers to systematically associate pay for performance across compensation programs.

The planning process allows for multiple compensation programs within the salary, bonus, and stock components of your organizations complete compensation package. SuccessFactors Compensation also facilitates eligibility, budgeting, and applying guidelines to individual compensation programs.

Information into SuccessFactors Compensation

Compensation relies on files that are uploaded into the system. All files uploaded are in the .csv format. (MS Excel)

The User Data File (UDF) contains standard compensation data and also allows for custom fields according to your organization's needs.

The Salary Pay Matrices file contains market data. It links the minimum, midpoint, and maximum salaries by pay grade, and also by currency, if needed. It can also contain up to three additional, customer-specified, attributes to match ranges (e.g., country, job location, etc.).
Compensation Reporting Hierarchy

The SuccessFactors default is for managers to plan compensation for their direct reports. However, it is possible to modify this default by creating a second reporting structure built into the UDF.

Terms and Definitions

Throughout training, you will be presented with terms that are specific to SuccessFactors Compensation. Before discussing SuccessFactors Compensation in more detail, it is important that you become familiar with these terms. Table 1 below lists the terms and definitions associated with SuccessFactors Compensation.

Table 1. Terms and Definitions

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compa-Ratio</td>
<td>Defines the employee’s pay as a percentage of the midpoint in the salary range. E.g.: $(\text{Current}_\text{Salary}/\text{Midpoint}) \times 100$</td>
</tr>
<tr>
<td>Compensation Administrator</td>
<td>Person responsible for configuring and monitoring a compensation cycle.</td>
</tr>
<tr>
<td>Compensation Form</td>
<td>The planning sheet created for each planner based on the Compensation Plan Template.</td>
</tr>
<tr>
<td>Compensation Plan Template</td>
<td>The record that contains the compensation configuration for a Compensation Cycle (e.g., planning sheet fields, performance rating source, eligibility, guidelines, budgets, instructional text, etc.). It is recommended that you create a plan template for each compensation cycle.</td>
</tr>
<tr>
<td>Compensation Program</td>
<td>This is the specific method of employee compensation for salary, bonus, or stock. For example merit, promotion, lump sum, and adjustment are programs for the salary sheet. Objective-based bonuses are available on the bonus sheet. Finally, stock, units, and options programs are displayed on the stock sheet.</td>
</tr>
<tr>
<td>Current Salary</td>
<td>Annualized salary paid to the employee.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Cycle</td>
<td>A compensation cycle encompasses one complete compensation process: from the time administrators research and configure, through the time that recommenders/approvers use the planning sheet to recommend and approve increases, to the time when compensation statements are generated.</td>
</tr>
<tr>
<td>Eligibility</td>
<td>Determines the employees who can participate in a compensation program. Employees are made eligible in the UDF and/or the Compensation Plan Template.</td>
</tr>
<tr>
<td>Guidelines</td>
<td>The expected range of a recommendation based on a performance rating and/or other criteria.</td>
</tr>
<tr>
<td>Planner</td>
<td>A manager who is authorized to recommend compensation changes for employees. The planner structure can follow the system default reporting structure, a second reporting structure built specifically for compensation in the UDF, or by allowing high level manager or admins to select the compensation planner.</td>
</tr>
<tr>
<td>Planning Sheet</td>
<td>A list of employees where a planner makes compensation recommendations for salary, bonus, and stock.</td>
</tr>
<tr>
<td>Raise Proration</td>
<td>The calculation of the eligible raise amount based on a date range or an uploaded percentage.</td>
</tr>
<tr>
<td>Range Penetration</td>
<td>The level of an individual pay compared to the total pay range, rather than compared with the midpoint. E.g.: (Current_Salary–Minimum) / (Maximum-Minimum)</td>
</tr>
<tr>
<td>Salary Pay Matrices</td>
<td>A list of pay grades and the associated min, mid, and max salary values. This is used to calculate the employees range penetration, compa-ratio, and display the salary range.</td>
</tr>
<tr>
<td>Salary Proration</td>
<td>The calculation of the eligible amount of salary based on a date range or an uploaded percentage. The recommendation is based off the prorated salary amount. Guidelines and budgets can be configured to use the employee’s prorated amount.</td>
</tr>
<tr>
<td>Salary Rate Type</td>
<td>The pay type of the employee (e.g., salary or hourly).</td>
</tr>
</tbody>
</table>
Administrator and Planner Roles

The Compensation module has two sides: the administration of the module and the use of the tool by compensation planners.

Administrators

The Compensation Administrators are responsible for configuring and monitoring a compensation cycle. Administrators have access to the Administration Tools area of the SuccessFactors application via the Admin Tools link (Figure 1).

Figure 1. Admin Compensation Tools

Click Compensation in the Company Processes & Cycles section. The admin then has access to all the compensation tools (Figure 2). If you do not have access to Compensation, contact your SuccessFactors system administrator to grant you the appropriate compensation permissions.

Figure 2. Admin Compensation Tools
Compensation Planners

Compensation planners are usually, but not always, managers who are authorized to make compensation decisions for their direct reports. The Compensation Planner makes recommendations using the compensation planning sheet (Figure 3). This form is created from the Compensation Plan Template and displays the manager’s employees, available budget, route map, compensation fields and worksheets for salary, bonus and stock calculations.

Figure 3. Compensation Planning Sheet
Knowledge Check

1. What are two files that are uploaded into SuccessFactors Compensation?

2. You have been introduced to the following terms used in Compensation. Place the letter of the term next to its definition.

<table>
<thead>
<tr>
<th>Column 1</th>
<th>Column 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Compensation Form</td>
<td>F. Compensation Administrator</td>
</tr>
<tr>
<td>B. Planner</td>
<td>G. Cycle</td>
</tr>
<tr>
<td>C. Planning Sheet</td>
<td>H. Eligibility</td>
</tr>
<tr>
<td>D. Compa-Ratio</td>
<td>I. Compensation Program</td>
</tr>
<tr>
<td>E. Compensation Plan Template</td>
<td>J. Guidelines</td>
</tr>
</tbody>
</table>

Answer Column 1

- List of employees where a planner makes compensation recommendations for salary, bonus, and stock.
- This measure defines the employee’s pay as a percentage of the midpoint in the salary range.
- The specific method of employee compensation for salary, bonus, or stock.
- A person who is responsible for configuring and monitoring a compensation cycle.
<table>
<thead>
<tr>
<th>Answer</th>
<th>Column 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>D</strong>etermines the employees who can participate in a compensation program.</td>
<td></td>
</tr>
<tr>
<td>Planning sheet created for the each planner based on the Compensation Plan Template.</td>
<td></td>
</tr>
<tr>
<td>A manager who is authorized to recommend compensation changes for subordinates.</td>
<td></td>
</tr>
<tr>
<td>The expected range of a recommendation based on a performance rating/other criteria.</td>
<td></td>
</tr>
<tr>
<td>Record that contains the compensation configuration for a compensation cycle.</td>
<td></td>
</tr>
<tr>
<td>One complete compensation process: from research and configure, through when compensation statements are generated.</td>
<td></td>
</tr>
</tbody>
</table>
Conclusion

This lesson introduced you to SuccessFactors Compensation.

You should now be able to:

- List the two essential data files to upload into SuccessFactors Compensation
- Define the terms used in SuccessFactors Compensation
- Differentiate the admin and planner roles in SuccessFactors Compensation
Lesson 1-2. The Compensation Process

The goal of this lesson is to establish a general understanding of the compensation process in SuccessFactors.

Objectives

Upon completion of this lesson, you will be able to:

- Describe the relationship between the compensation cycle, compensation plan templates, compensation forms, and compensation programs
- Name the types of compensation programs available in SuccessFactors Compensation
- Identify the necessary tasks to implement a compensation cycle in SuccessFactors Compensation

Compensation Cycles, Templates, and Forms

A compensation cycle encompasses four distinct stages: planning, configuration, recommendations, and completed forms.

In each cycle, in the configuration stage, a new compensation plan template is created. It can be cloned from the previous cycle, or created anew, but each compensation plan template should only be used for a specific compensation cycle.

Warning: Reusing a template for a new compensation cycle can cause historical data to be overwritten in the application.
After configuring the compensation plan template, the admin will mass generate the compensation forms. The form is the planning sheet that is based on compensation plan template and is sent to the compensation planners.
Compensation Programs

The method of employee compensation for salary, bonus, or stock is generically called a “program.” For example merit, promotion, lump sum, and adjustment are programs for the salary sheet.

Table 2 lists and describes the types of compensation programs used in SuccessFactors Compensation.

Table 2. Types of Compensation Programs

<table>
<thead>
<tr>
<th>Compensation Planning Sheet</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary</td>
<td>• Merit</td>
</tr>
<tr>
<td></td>
<td>• Promotion</td>
</tr>
<tr>
<td></td>
<td>• Adjustment (extra)</td>
</tr>
<tr>
<td></td>
<td>• Adjustment2 (extra2)</td>
</tr>
<tr>
<td></td>
<td>Do not affect current salary:</td>
</tr>
<tr>
<td></td>
<td>• Lumpsum</td>
</tr>
<tr>
<td></td>
<td>• Lumpsum2</td>
</tr>
<tr>
<td>Bonus (when applicable)</td>
<td>Bonus</td>
</tr>
<tr>
<td>Stock (when applicable)</td>
<td>The number of stock, options and/or units.</td>
</tr>
<tr>
<td></td>
<td>• Stock</td>
</tr>
<tr>
<td></td>
<td>• StockUnits</td>
</tr>
<tr>
<td></td>
<td>• Options</td>
</tr>
<tr>
<td></td>
<td>• StockOther1, StockOther2, StockOther3</td>
</tr>
</tbody>
</table>

Stages and Steps in a Compensation Cycle

Each stage of the compensation cycle has specific steps.

In the **Planning** stage, admins are responsible for research in preparation for configuration. The steps are:

- Listing the types of compensation, the programs, included
- Identifying the employee fields required for recommendations
Developing eligibility and guideline rules
Finalizing budgets and market data

In the **Configuration** stage, admins are responsible for configuring the Compensation Plan Template. This template contains all the information required for compensation planning—budgets, guidelines, eligibility rules and programs. In general, the steps involved during the configuration phase include:

- Update employee information in the UDF and market data
- Import data into SuccessFactors
- Clone compensation plan template
- Edit compensation plan template:
  - Add the desired program fields to the planning sheet (e.g., merit, promotion, bonus, etc.)
  - Create eligibility rules
  - Create guidelines
  - Create budgets
- Configure compensation manager hierarchy
- Upload currency exchange rates (if using multiple currencies)
- Mass create forms

In the **Recommendations** stage, planners are working with the compensation forms. Planners are responsible for:

- Entering recommendations on the salary, bonuses, and stock sheets
- Submitting planning sheet through the route map
- Approving route maps

In the **Completed Forms** stage, once forms are completed and approved, either Planners and/or admins generate compensation statements. The admin is responsible for exporting the aggregated compensation data for payroll.
Knowledge Check

1. What is the relationship between the compensation cycle, compensation planning template, compensation forms and compensation programs?

2. Name three compensation programs available in SuccessFactors Compensation.

3. List 5 tasks that the admin must do to implement a compensation cycle in SuccessFactors Compensation.
Conclusion

This lesson established a general understanding of Compensation Process.

You should now be able to:

- Describe the relationship between the compensation cycle, compensation plan templates, compensation forms, and compensation programs
- Name the types of compensation programs available in SuccessFactors Compensation
- Identify the necessary tasks to implement a compensation cycle in SuccessFactors Compensation
Lesson 1-3.   Managing the User Data File

The goal for this lesson is to provide detailed information about managing the User Data File (UDF) for SuccessFactors Compensation.

Objectives

Upon completion of this lesson, you will be able to:

- Describe how the User Data File (UDF) is used
- Identify standard fields in the UDF
- Add a custom field to the UDF
- Upload the UDF into SuccessFactors

User Data File Main Concepts

The User Data File (UDF) is the employee list that is exported from your HR system. Prior to uploading it to Compensation it must be populated with the information that Compensation requires in order to be able to use the module.

Standard Fields in the UDF

The UDF contains standard fields that SuccessFactors Compensation can use. All these fields are optional and your organization’s UDF should only include the data fields you have implemented. Table 3 is a table of all the standard data fields SuccessFactors Compensation recognizes.
Table 3. Standard Fields in the User Data File

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>Data Type</th>
<th>Example</th>
<th>Functionality using this data</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOBTITLE</td>
<td>STRING</td>
<td>ANALYST</td>
<td>Job title for the user.</td>
</tr>
<tr>
<td>JOBLEVEL</td>
<td>STRING</td>
<td>II</td>
<td>Job level for the user.</td>
</tr>
<tr>
<td>PAYGRADE</td>
<td>STRING</td>
<td>ANALYST2</td>
<td>Used for salary benchmark, such as compa-ratio and range penetration.</td>
</tr>
<tr>
<td>DATE_OF_CURRENT_POSITION</td>
<td>DATE</td>
<td>07/01/2013</td>
<td>Date that the user has been in the current position; can also be used to show date of last salary adjustment.</td>
</tr>
<tr>
<td>SALARY_PRORATING</td>
<td>NUMBER</td>
<td>80</td>
<td>Used for compensation adjustment proration. Represented as a percentage, default is 100.</td>
</tr>
<tr>
<td>SALARY</td>
<td>NUMBER</td>
<td>96000</td>
<td>SALARY Used for aggregate, budget, and bonus calculation.</td>
</tr>
<tr>
<td>LOCAL_CURRENCY_CODE</td>
<td>STRING</td>
<td>EUR</td>
<td>Used for salary calculation between US dollars and user’s local currency. Required for multi-currency deployments. ISO 4217 Code is expected.</td>
</tr>
<tr>
<td>MERIT_TARGET</td>
<td>NUMBER</td>
<td>16000</td>
<td>Optional. Applicable if merit percentage is based on merit target.</td>
</tr>
<tr>
<td>MERIT_EFFECTIVE_DATE</td>
<td>DATE</td>
<td>04/01/2013</td>
<td>Date that merit changes should be in effect. Used for cash flow impact of merit and payroll transaction.</td>
</tr>
<tr>
<td>PROMOTION_AMOUNT</td>
<td>NUMBER</td>
<td>4000</td>
<td>Pre-populated salary adjustment for promotion.</td>
</tr>
<tr>
<td>LUMPSUM_TARGET</td>
<td>NUMBER</td>
<td>16000</td>
<td>Used for lump sum achievement calculation. Required if lump sum amount is based on lump sum target.</td>
</tr>
<tr>
<td>COLUMN NAME</td>
<td>Data Type</td>
<td>Example</td>
<td>Functionality using this data</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------</td>
<td>---------</td>
<td>---------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>LUMPSUM2_TARGET</td>
<td>NUMBER</td>
<td>16000</td>
<td>Used for lump sum2 achievement calculation. Required if lump sum2 amount is based on lump sum2 target.</td>
</tr>
<tr>
<td>BONUSTARGET</td>
<td>NUMBER</td>
<td>3200</td>
<td>Pay for Performance/Bonus target Required for bonus amount calculation.</td>
</tr>
<tr>
<td>COMPENSATION_READONLY</td>
<td>STRING</td>
<td>TRUE</td>
<td>Used to indicate user compensation data editability. Set to “TRUE” to indicate that the data for the user is read-only, otherwise, the data is editable Default is “FALSE.”</td>
</tr>
<tr>
<td>COMPENSATION_ELIGIBLE</td>
<td>STRING</td>
<td>TRUE</td>
<td>Used to indicate whether the user is eligible to be in compensation forms during form creation. Default is “TRUE.”</td>
</tr>
<tr>
<td>COMPENSATION_SALARY_ELIGIBLE</td>
<td>STRING</td>
<td>TRUE</td>
<td>Used to indicate whether the user is eligible to be in the salary sheet of compensation forms during form creation, applies only if the user is generally eligible to be in forms, i.e. COMPENSATION_ELIGIBLE is true</td>
</tr>
<tr>
<td>COMPENSATION_BONUS_ELIGIBLE</td>
<td>STRING</td>
<td>TRUE</td>
<td>Used to indicate whether the user is eligible to be in the bonus sheet of compensation forms during form creation, applies only if the user is generally eligible to be in forms, i.e. COMPENSATION_ELIGIBLE is true Default is “TRUE.”</td>
</tr>
<tr>
<td>COMPENSATION_STOCK_ELIGIBLE</td>
<td>STRING</td>
<td>TRUE</td>
<td>Used to indicate whether the user is eligible to be in the stock sheet of compensation forms during form creation, applies only if the user is generally eligible to be in forms, i.e. COMPENSATION_ELIGIBLE is true. Default is “TRUE.”</td>
</tr>
<tr>
<td>COLUMN NAME</td>
<td>Data Type</td>
<td>Example</td>
<td>Functionality using this data</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-----------</td>
<td>---------</td>
<td>------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>COMPENSATION_SAL_RATE_TYPE</td>
<td>STRING</td>
<td>HOURLY</td>
<td>Used to describe that the type of salary rate for the user, such as “HOURLY” or “MONTHLY”. Applicable to implementations with compensation plans which include non-annual salaried employees.</td>
</tr>
<tr>
<td>COMPENSATION_SAL_RATE_UNITS</td>
<td>NUMBER</td>
<td></td>
<td>COMPENSATION_SAL_RATE_UNITS. SALARY * COMPENSATION_SAL_RATE_UNITS = Annual salary. Applicable to implementations with compensation plans which include non-annual salaried employees.</td>
</tr>
<tr>
<td>RAISE_PRORATING_START_DATE</td>
<td>DATE</td>
<td>01/01/2013</td>
<td>The employee’s begin date that is used to calculate the proration percent. This date is subtracted from the RAISE_PRORATION_END_DATE. This is used if the raise proration functionality is turned on.</td>
</tr>
<tr>
<td>RAISE_PRORATING_END_DATE</td>
<td>DATE</td>
<td>12/31/2013</td>
<td>The employee’s end date that is used to calculate the proration percent. The RAISE_PRORATION_BEGIN_DATE is subtracted from this date. This is used if the raise proration functionality is turned on.</td>
</tr>
<tr>
<td>SALARY_PRORATING_START_DATE</td>
<td>DATE</td>
<td>01/01/2013</td>
<td>The employee’s begin date that is used to calculate the proration percent. This date is subtracted from the SALARY_PRORATION_END_DATE. This is used if the salary proration functionality is turned on.</td>
</tr>
<tr>
<td>SALARY_PRORATING_END_DATE</td>
<td>DATE</td>
<td>12/31/2013</td>
<td>The employee’s end date that is used to calculate the proration percent. The SALARY_PRORATION_BEGIN_DATE is subtracted from this date.</td>
</tr>
<tr>
<td>COLUMN NAME</td>
<td>Data Type</td>
<td>Example</td>
<td>Functionality using this data</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------</td>
<td>----------</td>
<td>---------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>JOBFAMILY</td>
<td>STRING</td>
<td>Corporate</td>
<td>Job Family the employee is currently in</td>
</tr>
<tr>
<td>JOBROLE</td>
<td>STRING</td>
<td>Management</td>
<td>Job Role the employee is currently in</td>
</tr>
<tr>
<td>FINAL_JOBFAMILY</td>
<td>STRING</td>
<td>Corporate</td>
<td>The employee’s new Job Family</td>
</tr>
<tr>
<td>FINAL_JOBROLE</td>
<td>STRING</td>
<td>Sr. Management</td>
<td>The employee’s new Job Role.</td>
</tr>
<tr>
<td>FINAL_JOBCODE</td>
<td>STRING</td>
<td>2001</td>
<td>The employee’s new Job Code.</td>
</tr>
<tr>
<td>SECOND_MANAGER</td>
<td>STRING</td>
<td>JMARR</td>
<td>The Employee Hierarchy created specifically for SuccessFactors Compensation</td>
</tr>
</tbody>
</table>

**User Data File (UDF) Fields**

**Field Values**

The UDF field values should follow these rules:

- Values should not contain commas, currency signs, or leading/trailing spaces
- All dates must be MM/DD/YYYY format
- Avoid leading zero’s when possible
- Percent values are whole numbers (e.g., 95.8% is 95.8)

The most common issues with compensation occur when the uploaded data is not formatted properly.
Custom Fields

SuccessFactors Compensation allows customers to import their own fields that can be displayed on the planning sheet. It is good practice to start your custom field heading with a prefix indicating that it is a custom field. For example, if you want to add the 2012 Merit Increase on the 2013 salary sheet, then you would create a new column in the UDF with the CUSTOM_2012_MERIT_INCREASE heading. This field is added to the salary sheet during the column builder lesson.

![Figure 6. Example UDF with Custom 2012 Merit Column](image)

Importing the UDF

The UDF can be uploaded using Administration Tools. Navigate to Update User Information > Import Employee Data. Select the UDF that contains the compensation data and then click Import Employees.

![Figure 7. Employee Import](image)
Lab 1:  Import User Data

In this lab, you will add a 2012 merit increase to your User Data File and then import it into SuccessFactors. This will allow you to display last year’s merit increase on this year’s compensation planning form for informational purposes.

1. Open the User_Data_File_Comp_Admin.csv file, which was provided to you prior to class in Excel (or other spreadsheet program).

2. Add a new column, name it CUSTOM_2012_MERIT_INCREASE and set all values to 3000.

3. Save the updated file in .csv format as UDF_2013.csv.

4. In SuccessFactors, click the Name Menu at the top of the screen and select Admin Tools.

5. Click Update User Information.

6. Click Employee Import.

7. Click Browse.

8. Select the UDF_2013.csv from your files.

9. Click Import User File.

10. Click OK.

Job Aid: Import User Data
Knowledge Check

1. What is the User Data File (UDF)?

2. Which of the following is a standard data field in the UDF? (Check the ones that are.)
   - PAYGRADE
   - READONLY_COMPENSATION
   - SALARY
   - JOBROLE
   - JOB_ROLE
   - COMPENSATION_SALARY

3. What is the best practice when creating custom fields?

4. List the steps to navigate to the interface for uploading the UDF.
Conclusion

In this lesson, you were introduced to updating and uploading the UDF for a new compensation cycle.

You should now be able to:

- Describe the User Data File (UDF)
- Identify standard compensation fields in the UDF
- Add a custom field to the UDF
- Upload the UDF into SuccessFactors

In the next lesson, you will learn how to update the salary pay matrices table.
Lesson 1-4. Updating Salary Pay Matrices

The goal for this lesson is to provide detailed information about managing salary pay matrices in SuccessFactors Compensation.

Objectives

Upon completion of this lesson, you will be able to:

- Describe the content and purpose of a salary pay matrices file
- Create a salary pay matrices file
- Import salary pay matrices for a new compensation cycle

Salary Pay Matrices Main Concepts

Salary pay matrices are tables that define the minimum, the mid-point, and the maximum salary for each grade level. These tables also denote if a grade level is promotable. In addition, customers can use the three available attributes to match ranges on multiple fields. For example, the range can match on Pay Grade and Country, or Pay Grade, Job Code, and Location.

Creating a Salary Pay Matrix File

The salary pay matrix is defined in a .csv file. Creating a new pay matrix requires uploading a new .csv file with the following fields populated, as determined by your organization:

- Currency (only if uploading ranges in local currency)
- Promotable flag
- Pay Grade
- Minimum
- Mid-point
- Maximum
- Attribute1
Be sure that each pay grade has a minimum and a maximum value and that the mid-point does not equal zero. These would cause someone in that pay grade to be excluded from a form.

In order for the system to calculate the rates correctly, the minimum, mid-point, and maximum values must be stated in the same terms as the pay grade salary. An hourly employee would have a “salary” range for the hourly rate.

The attribute values are used to map additional fields to salary ranges. For example, we could set Attribute1 to Country if salary ranges are based on Pay Grade and Country. If the attributes are not used, then these columns are populated with **wildcard character. (Figure 8).

![Sample Pay Matrix .csv file](image.png)

**Warning:** Do not update the table referenced in previously launched forms. Changes to the Pay Matrix table after forms are launched are dynamic and will impact completed forms. Only if you want to change data in completed forms should you modify the file.

Once the .csv file is created, it can be uploaded to SuccessFactors Compensation.
Lab 2: Add New Pay Matrix

In this lab, you will set up a new salary pay matrix with a pay grade “H2” that has a minimum pay at 20, mid-point of 27, and maximum of 35. The position is promotable.

1. Navigate to Administration Tools.


3. Click the link for the comp_payguide pay matrix to export.

4. Scroll down. Click Export.

5. Save the file on your hard drive.

6. Open file in Excel (or other spreadsheet program.)

7. Add a new row.

8. In the new row, create pay grade H2.

9. Enter min pay 20, mid-point 27, and max 35.

10. Enter TRUE in the Promotable column.

11. Enter asterisks in each of the Attribute columns.

12. Save the updated file as 2013_Pay_Matrix.csv.

13. In SuccessFactors, navigate Up to all pay matrices.

14. Enter 2013 Pay Matrix in the Name field.

15. Enter Compensation Admin Training Matrix in the Description field.
16. Select **in functional** currency if not already selected.

17. Click **Create**.

18. Click the link for the newly created pay matrix.

19. Click **Browse**.

20. Select the **2013_Pay_Matrix.csv** file from your hard drive.

21. Click **Import**.

**Job Aid:** Add New Pay Matrix
Knowledge Check

1. What are salary pay matrices?

2. If the mid-point of a pay range in an uploaded file is "0" what will happen?
Conclusion

In this lesson, you were introduced to the admin role in updating the salary pay matrix for a new compensation cycle. Step-by-step instructions were provided.

You should now be able to:

- Describe the content and purpose of a salary pay matrices file
- Create a salary pay matrices file
- Import salary pay matrices for a new compensation cycle

In the next lesson, you will learn how to update currency conversion rate tables.
Lesson 1-5. Updating Currency Conversion Rate Tables

The goal for this lesson is to provide detailed information about updating currency conversion rate tables in SuccessFactors Compensation.

Objectives

Upon completion of this lesson, you will be able to:

- Describe the content and purpose of the currency conversion rate table
- Create a currency conversion rate table
- Import the currency conversion rate table for a new compensation cycle

Currency Conversion Rate Table Main Concepts

The currency conversion rate table provides the compensation plan templates the information to manage multiple currencies in views that depend on this information.

Note: This only applies to customers whose plan templates are configured to use multiple currencies.

The Conversion Rate Table

The currency table is a CSV file that is uploaded into the SuccessFactors system using Administration Tools. One method for creating a new table is to export the current data from SuccessFactors, open it in a spreadsheet program, make changes, save it with a new file name, and import it into SuccessFactors.

When defining the exchange rate, only include one entry for each currency conversion. For example, if you want to add the exchange rate for USD to EUR, add the row USD to EUR at 0.814. Do not add a second row EUR to USD at 1.2285. SuccessFactors Compensation will calculate this rate based on the USD to EUR conversion. It is recommended to specify five decimal places.
You must define all possible combinations in the Currency Rate table. If you are using USD, EUR, CAN, and JPY, then your exchange table would contain six rows.

![Figure 9. Example Currency Rate .csv file](image)

**Note:** Do not update the table referenced in previously launched forms. Changes to the currency rate table after forms are launched are dynamic and will impact completed forms.
Lab 3: Update Currency Conversion Rate Tables

In this lab, you will update the currency conversion table to reflect current currency conversion rates.

1. Navigate to Administration Tools > Compensation > Manage Currency Conversion Rate Tables.

2. Click on 2012_Curr_Conv to select currency table.

3. Scroll to bottom and click Export.

4. Open file in Excel (or other spreadsheet program).

5. Go to http://www.xe.com and look up USD, JPY, CAD, and EUR.

6. Adjust rates based on current exchange rates and save as 2013_Curr_Conv.csv.

7. In SuccessFactors, navigate Up to all conversion tables.

8. In the Name field, enter 2013_Curr_Conv.

9. In the Description field, enter 2013 Compensation Admin Training Conv Rate Table.

10. Click Create.

11. Click the 2013_Curr_Conv link.

12. Click Browse and select the 2013_Curr_Conv.csv file.

13. Click Import.

Job Aid: Update Currency Conversion Rate Tables.
Knowledge Check

1. What does the currency conversion rate table provide?
Conclusion

In this lesson, you were introduced to the admin role in updating the currency conversion table. Step-by-step instructions were also provided.

You should now be able to:

- Describe the content and purpose of the currency conversion rate table
- Create a currency conversion rate table
- Import the currency conversion rate table for a new compensation cycle

In the next module, you will learn how to configure SuccessFactors Compensation.
Notes
Module 2. Configuring SuccessFactors Compensation

This module contains the following lessons.

- Lesson 2-1: Compensation Plan Template
- Lesson 2-2: Column Designer
- Lesson 2-3: Eligibility
- Lesson 2-4: Guidelines
- Lesson 2-5: Budgets
- Lesson 2-6: Compensation Forms

Objectives

Upon completion of this module, you will be able to:

- Copy a compensation plan template and update the configuration for the next compensation cycle
- Design the columns for the planning sheet
- Define eligibility rules and conditions in the compensation plan template
- Create and configure guidelines for compensation programs
- Create a budget for a compensation program based on business requirements
- Launch, manage, and delete compensation forms
Lesson 2-1. Compensation Plan Template

The goal for this lesson is to update the basic settings of a compensation plan templates in SuccessFactors Compensation.

Objectives

Upon completion of this lesson, you will be able to manage the following in the compensation form template:

- Copy a compensation plan template for a new compensation cycle
- Describe guideline optimization
- Select the functional currency, route map, currency conversion rate table, salary pay matrix, and rating source for a compensation plan template
- Edit the instructional text for the salary, bonus, stock, and summary sheets

Compensation Plan Template Main Concepts

The compensation plan template pulls together all the elements necessary for compensation planning. The functional currency, exchange rates, benchmarks, rating sources, eligibility rules, guidelines and budgets are all set in the template. The template also contains the look of the worksheets with columns and layout and is assigned a route map for review and approvals.

Creating a New Template for Each Cycle

Each year before your compensation cycle begins you will create a new template by copying the previous cycle’s compensation plan template.

In creating this new template, you ensure that the Executive Review and aggregate export will contain data specific to the cycle. In addition, you will keep historical data from prior years intact.

Testing

It is best practice to create the compensation plan template in your test instance so you can complete a full end-to-end testing cycle to ensure your changes are
working as expected. Start with the final compensation plan template from the previous cycle.

**Note:** If your previous cycle compensation template in test is not in sync with the production version, contact SuccessFactors Customer Success for assistance in moving the most recent production template into test to clone it.
Lab 4: Copy a Compensation Plan Template

In this lab, you will copy last year’s compensation plan template for use this year.

1. Navigate to Administration Tools > Compensation > Manage Compensation Plan Template.

2. Scroll Last Year Compensation Plan and select the Copy Plan icon from the Actions column.

3. Type in 2013 Compensation Plan for the new plan template.

4. Click Copy.

5. Click OK.

Job Aid: Copy a Compensation Plan Template.
Compensation Plan Template Information

Once the copy is made, you configure the template according to specifications for the compensation cycle you are working on. The first page is the Compensation Plan Templates Information tab.

![Figure 10. Compensation Template Information](image)

On this tab, configure the name, date, functional currency, route map, currency conversion rate table, and the salary pay matrix. Select guideline optimization if desired.

**Guideline Optimization**

The Enable Guideline Optimization checkbox enables the system to store the guidelines in the database in order to improve the loading performance of the planning sheet. If you check this checkbox and then update the guidelines after form generation, the guidelines will be updated on the planning sheet. If you do not check this checkbox, then the compensation form will need to be deleted and regenerated to display any guideline changes.
Lab 5: Compensation Plan Template Information

(Continues from Lab 4)

In this lab, you will edit the Template Information in a compensation plan template to enable guideline optimization and use USD as the functional currency. You will also associate the new pay matrix and currency conversion table to the template.

1. Select 2013 Compensation Plan template to edit.

2. Click on Enable Guideline Optimization.

3. Select USD from the Currency drop down menu.

4. Select Compensation for the route map.

5. Select 2013_Curr_Conv Currency Conversion Rate Table from drop-down menu.


7. Click Save.

Job Aid: Compensation Plan Template Information.
Rating Sources

Performance ratings that compensation planners will use to make compensation decisions are set in the template on the Rating Sources tab. Ratings can come either from the User Data File or from a Performance Management Form. Each worksheet (salary, bonus or stock) used in compensation can have its own rating source.

When imported from the UDF, the column heading is entered into the field “Import Key.” When using a PM form, you will select the form from a drop-down menu. Other options include the PM rating type, whether to use the calculated rating, and if only completed PM forms are to be included.

Figure 11. Compensation Template Rating Sources
**Rating Sources**

The Rating Sources is only applicable for a rating source that is imported into the SuccessFactors database. It determines the description to display from the imported numeric value. When using a PM form as a rating source, the rating scale is defined in the PM form XML. If the rating scale for your Performance Review form has changed, contact SuccessFactors Customer Success to request them to update your PM template.

**Instructional Text**

Custom text providing instructions for compensation planners can be entered in the compensation plan template. Text can be in multiple languages for the Salary, Bonus, Stock, and Summary sheets. The user can format text with tools for bold, italics, underline, lists, indents, web link, color, and spell check.

![Instructional Text on the Compensation Form](image)
Lab 6: Adding Instructional Text

(Continues from Lab 5)

In this lab, you will add instructional text to the Compensation Plan Template.

1. Select Instructional Text.

2. Click in Salary field to type in new text.

3. Type in “This grid allows you to plan and allocate compensation for the employees you manage. Pay attention to the budget guidelines and the proposed allocation. Alter the proposed allocation as appropriate.”

4. Click Save.

Job Aid: Adding Instructional Text.
Knowledge Check

1. Name one advantage to enabling Guideline Optimization.

2. The compensation plan template has many components. Which of the following are most likely to change from one compensation cycle to the next?
   - Functional currency
   - Route map
   - Currency conversion table
   - Salary pay matrix
   - Rating source
Conclusion

In this lesson, you were introduced to the admin role in editing a compensation plan template for a new compensation cycle. Step-by-step instructions were provided.

You should now be able to:

- Clone a compensation plan template for a new compensation cycle
- Describe guideline optimization
- Select the functional currency, route map, currency conversion rate table, and salary pay matrix, for a compensation plan template
- Edit the instructional text for the salary, bonus, stock, and summary sheets

In the next module, you will learn how to add fields to the planning sheet.
Lesson 2-2. Column Designer

The goal for this lesson is adding, removing, and ordering columns on the compensation plan template in SuccessFactors Compensation.

Objectives

 Upon completion of this lesson, you will be able to manage the following in the compensation form template:

- Configure a field grouping for the salary sheet
- List column attributes
- Add and specify display order for standard and custom columns on the salary, bonus, and stock sheets
- Create calculated fields in the salary, bonus, and stock worksheets

Column Designer Main Concepts

The column designer allows you to design the layout of the salary, bonus, and stock sheets. You can modify the column order, column heading, and salary field group names and background color of each group of fields.

Figure 13. Worksheet with Colors, Groups, and Labels
Fields

Each field to be displayed on the worksheet is listed on the left-hand side of the interface. The fields can be rearranged on the worksheet by selecting and holding the handle to the left and moving the field up or down. Each field becomes a column in the worksheet; the order listed is the order of the columns horizontally.

Figure 14. Column Designer

Figure 15. Field Handles
Field Groups

The salary sheet allows common fields to be grouped. Admins can change the grouping name and color. They can also add additional groups to the worksheet.

![Field Group Configuration](image)

Figure 16. Field Group Configuration

Adding Fields

You can add standard, custom, or calculated fields to the salary, bonus, and stock sheets. Each field will become a column on the worksheet.

Columns

There are three types of columns possible in SuccessFactors. They are: Standard columns, custom columns and calculated columns.

Standard Columns

Standard columns are predefined fields in SuccessFactors Compensation that can be added to the planning sheet. Once the field is added you can change the display order, rename the column heading, and set the visibility. Hidden fields are not displayed on the planning sheet, but can be used for calculated fields.
Figure 17. Standard Columns
Lab 7: Designing A Column

(Continued from Lab 6)

In this lab, you will format the Current Salary group to appear as green on the Compensation Plan.

1. Select **Column Designer**.

2. Select **Current Salary** group.

3. Choose **Money Green** background group.

4. Select **Save**.

Job Aid: Designing a column.
Custom Columns

Customer defined fields can be uploaded in the UDF and displayed on the planning sheet. Fields can be in formats of currency, date, amount, percent, and string (i.e., text).

The link between the custom column and the data in the UDF is the **Import Key**. The Import Key must match the UDF column heading exactly (it is case sensitive).

The **Column ID** is the name used within the compensation form. It is recommended to add a prefix to the Column ID and Import Key, such as custom, to easily identify custom fields. It should be a unique name, letters only with no special characters or spaces allowed.

The **Read-only** option offers two choices, yes or no. Read-only is required if the column is a calculated field. If the custom column is set to read-only, it can also be set to reloadable. Reloadable fields are updated when the UDF is imported. If a field is not set to reloadable, you will need to delete and mass generate the compensation forms when the value changes. The no choice means the field allows for inputs. The planner can enter a value. Admins can set a value range or a list of possible values for an input custom field.

Finally, the field can be made available in ad-hoc reports by selecting **Reportable**. If the field type is Amount or Money, it can be totaled in the summary sheet.

![Figure 18. Column Designer Custom Field](image)

**Figure 18. Column Designer Custom Field**
Calculated Columns

SuccessFactors Compensation can perform calculations on standard, custom, and calculated fields. These calculations can be simple formulas (e.g., add, subtract, multiply, and divide). You can also use SuccessFactors compensation functions to find values from a lookup table, apply conditional statements, and round values. Calculated fields must be read-only.

![Figure 19. Column Designer Calculated Field](image)

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Lab 8:  Add A Custom Column

(Continued from Lab 7)

In this lab, you will add a new column to the 2013 Compensation Template to display the employees’ salary increase from last year. You will also reorder the columns and delete the 2011 Increase field.

1. Still in the Column Designer, select the Add Column drop-down menu and select Custom.

2. Type 2012 Increase in the Column Name field.

3. Select Read-only option Yes.

4. Select Money from the Column Type drop-down menu.

5. Select the Default Money Format.

6. Enter customField9 in the ColumnID field.

7. Enter CUSTOM_2012_MERIT_INCREASE in the Import Key field.

8. Click Save.

9. Click and drag the new column into the Current Salary section before 2011 Increase.

10. Click the trash can next to the 2011 Increase to delete it.

11. Click Save.

Job Aid: Add a Custom Column
Knowledge Check

1. List six things the Column Designer will allow you to do.

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

2. What are the three column types available in SuccessFactors Compensation?

__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
Conclusion

In this lesson, you were introduced to the column designer. Using the column designer you can control the columns and layout of the planning sheet.

You should now be able to:

- Configure a field grouping for the salary sheet
- List column attributes
- Add and specify display order for standard and custom columns on the salary, bonus, and stock sheets
- Create calculated fields in the salary, bonus, and stock worksheets

In the next lesson, you will learn how to set employee eligibility for compensation programs.
Lesson 2-3. Compensation Eligibility

The goal for this lesson is to configure employee eligibility for compensation programs using the eligibility engine in the Compensation Plan Template or UDF.

Objectives

Upon completion of this lesson, you will be able to:

- Describe how “eligibility rules” are used to exclude employees from compensation programs
- Identify the two methods for establishing ineligibility for compensation programs in the UDF
- Set employee compensation program ineligibility using the eligibility engine

Eligibility Main Concepts

All employees are eligible for compensation programs by default. To make an employee ineligible for compensation programs requires either defining this in the UDF or using the eligibility engine in the Administration Tools of the Compensation Plan Template.

Importing Employee Eligibility

There are two different ways to make an employee ineligible in the UDF.

Remove employee

An employee can be flagged as not eligible for compensation planning. Set the COMPENSATION_ELIGIBLE field to FALSE in the UDF. In this case the employee will not show up on any of the compensation planning worksheets.

Leave employee and disable planning

Instead of removing the employee from planning sheet, SuccessFactors compensation can disable the entire row on the specified sheet for employees who are not eligible.
Set the following fields to TRUE or FALSE to flag an employees’ eligibility:

- COMPENSATION_SALARY_ELIGIBLE
- COMPENSATION_BONUS_ELIGIBLE
- COMPENSATION_STOCK_ELIGIBLE

You can also specify the eligibility for individual program. The following are the 12 eligibility fields that can be set to TRUE or FALSE in the UDF:

- MERIT_ELIGIBLE
- PROMO_ELIGIBLE
- LUMPSUM_ELIGIBLE
- LUMPSUM2_ELIGIBLE
- EXTRA_ELIGIBLE
- EXTRA2_ELIGIBLE
- STOCK_STOCK_ELIGIBLE
- STOCK_OPTION_ELIGIBLE
- STOCK_UNITS_ELIGIBLE
- STOCK_OTHER1_ELIGIBLE
- STOCK_OTHER2_ELIGIBLE
- STOCK_OTHER3_ELIGIBLE

When an employee is not eligible for a program, the box in the planning sheet is disabled.

![Figure 20. Column Designer Calculated Field](image-url)
Eligibility Engine

Another method for defining who is ineligible for compensation programs is through “Eligibility Rules” in the Compensation Planning Template. The Compensation Eligibility engine allows you to create rules to designate who is not eligible for programs such as merit, salary adjustments, lump sum disbursements, bonus, stock, and options. Notice the logic, when you are defining who is eligible you need to create a rule for who is not eligible. For example, if employees hired before July 1, 2012 are eligible for a program, then the rule is: all employees hired after June 30th are not eligible.

Note: Eligibility rules are not copied when the plan template is copied. Before this step, admin should view the previous template and document the rules that they need to recreate.

Warning: Uploaded eligibility values supersede the eligibility engine. Therefore, if an employee’s program eligibility is defined in the UDF, then the program eligibility rule is not applied to that employee.

Create Eligibility Rules

Rules have:

1. A defined group set by attribute.
2. Conditions that are met by that group set with fields and values.
3. Program eligibility buttons.
Figure 21. Compensation Plan Template Eligibility Rule Interface

Set Attributes

Rules create pools of employees based on logic that you define in order to set their eligibility, for instance an employee’s city or job code. A rule can have any name.

Figure 22. Eligibility Rule

Conditions

A condition is a statement that is either true or false and composed of an eligibility field and its value. All rules must have at least one condition. When you run the rule, the system evaluates all the users in the system against the condition. For example: A rule that sets employees not eligible if they are hired after June 30, 2012 has one condition set by eligibility field of date and the value June 30, 2012.
A rule can have multiple conditions. For example, you might want to create a rule that matches all users hired after July 1 who are also in the Sales department. You create two conditions:

- Hire date > June 30, 2012
- Department = Sales

Logical choices: Any vs. All

The Match drop-down menu offers the logical choices of “any of the following criteria” and “all of the following criteria.”

![Match Drop-down Menu](image)

Any of the following criteria

This selection states that the employee is either hired after June 30, 2012 OR they are in the Sales department.
All of the following criteria

This selection states that the employee is hired after June 30, 2012 AND they are in the Sales department

<table>
<thead>
<tr>
<th>Employee</th>
<th>Hire Date</th>
<th>Department</th>
<th>In Rule Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carol</td>
<td>October 17, 2012</td>
<td>Sales</td>
<td>Yes</td>
</tr>
<tr>
<td>Kevin</td>
<td>April 7, 2012</td>
<td>Sales</td>
<td>No</td>
</tr>
<tr>
<td>Lily</td>
<td>August 23, 2012</td>
<td>Accounting</td>
<td>No</td>
</tr>
<tr>
<td>Melissa</td>
<td>February 18, 2012</td>
<td>Accounting</td>
<td>No</td>
</tr>
<tr>
<td>Bob</td>
<td>March 30, 2012</td>
<td>Marketing</td>
<td>No</td>
</tr>
</tbody>
</table>

Eligibility Fields

SuccessFactors Compensation supplies the following standard eligibility fields for rules.

- Department
- Division
- Location
- Hire Date
- Job Family
- Job Role
- Salary Grade
- Job Level
- Job Title
- Job Code
- Review Rating

It also includes any custom fields defined in the column builder.
Program Eligibility

After you create the rules and conditions for the employees, you then need to select the eligibility status for one or more programs. Click the No button to set employees to a not eligible status and Not Applicable for programs that you do not want to set eligibility. The default is Yes.

Note: The Yes column should be ignored.
Apply the Rule

After creating all the rules, click the Apply button in the top left corner of the Eligibility Rules page. If you update any rules, you must click the Apply button to cascade it to the employees.

Warning: If you generated the compensation forms before you updated the eligibility rules, then you will need to also update the compensation forms. Refer to lesson three for more details.
Lab 9: Editing Eligibility Rules

(Continued from Lab 8)

In this lab, you will edit eligibility rules for the Compensation Plan Template so that only those employees hired prior to July 1, 2012 are eligible for a merit increase.

1. Select Eligibility Rules and click Add Rule.

2. In Rule Name type in Employee’s Hired Before July 1 2012.

3. Click Add in Rule Name & Conditions.

4. Select Hire Date and click Add.

5. Click [Click to Edit].

6. Select Match any of the following criteria.

7. Select Hire Date is > (greater than) from the drop-down menu.

8. Enter 07/01/2012.

9. Click Done.

10. Select compensation types for which the population is eligible: Merit, Promotion, Adjustment, and Lump Sum.

11. Click Save.

12. Click Apply.

Job Aid: Eligibility Rules
Compensation Eligibility Report

In order to verify that the eligibility rules are correct, you should run the “Compensation Eligibility Ad-Hoc Report”. Navigate to Reports > Analytics > Reporting > Ad Hoc Report, and click Create New Report. In the dialog box that displays, select Compensation Eligibility from the Report Definitions Type, drop-down menu.

![Figure 26. Compensation Eligibility Report](image)

**Warning**: The Compensation Eligibility report only returns eligibility status for generated compensation forms.
Knowledge Check

1. A compensation merit program has been created for employees who have more than three years of tenure on January 1, 2013. To implement this in your compensation plan template you would: (Choose one.)

   a) Create the condition: “all employees hired before January 1, 2010” and select yes in the program eligibility box.

   b) Create the condition: “All employees hired on or after January 1, 2010” and select no in the program eligibility box.

2. What are the two methods for establishing ineligibility for compensation programs in the UDF? And what are the consequences of each method?

   ____________________________________________________________

   ____________________________________________________________

   ____________________________________________________________

   ____________________________________________________________

   ____________________________________________________________
Conclusion

In this lesson, you were introduced to compensation plan template eligibility rules.

You should now be able to:

- Describe how “eligibility rules” are used to exclude employees from compensation programs.
- Identify the two methods for establishing ineligibility for compensation programs in the UDF
- Set employee compensation program ineligibility using the eligibility engine

In the next module, you will learn how to create and assign compensation program guidelines to eligible employees.
Lesson 2-4. Guidelines

The goal of this lesson is to define guidelines for compensation programs that reflect the business needs.

Objectives

Upon completion of this lesson, you will be able to:

- Define compensation guidelines
- List the components of a guideline matrix
- Create and configure a guideline rule
- Import and export guideline matrices

Guidelines Overview

Guidelines dictate the range that a planner can use to make recommendations. Each compensation program has its own guidelines. SuccessFactors allows you to update guidelines within the system or to import a CSV file containing the guideline matrix.

Guidelines are developed as a matrix. The matrix is a set of recommended compensation amounts, or percentages, based on attributes (“formula criteria”) of the employee. For example when the attribute is performance rating, if someone has an overall review score of 5 out of 5, then the guideline might recommend an increase from 3%-5%. However, if the person scored 4 of 5, then the guideline might recommend an increase of 2%-3%.

Guidelines help managers make recommendations that are congruent throughout the organization.

Warning: You may want to discuss any guideline changes with a SuccessFactors Consultant because they could have consequences elsewhere. For example, these changes can impact budgets that are based on the guideline default values.
Performance Ratings in Guidelines

To use performance ratings in compensation guidelines, you must configure your performance process to allow it. Navigate to Admin > Compensation > Compensation Plan Template, open the compensation plan template, and then click the Rating Source tab. Refer to Lesson 6 for details on selecting a rating source.

Guideline Rules

Each guideline is set for a specific compensation program already defined in SuccessFactors Compensation (Merit, Promotion, Lumpsum, etc.). Guideline rules specify the range allowed by for each attribute.

![Figure 27. Guideline Matrix Types](image)

Attributes (Formula Criteria)

The attributes available for developing guidelines include:

- Rating (Performance Rating)
- Ratio Range (either Compa-Ratio or Range-Penetration)
- Job Level
- Pay Grade
- Budget Group

Guidelines are set for one or more of these employee attributes.
Formulas are based on percent or amount. Percent is typically used for compensation programs such as merit, promotion, and adjustment. Amounts are typically used for stock allocations.

**Other Options**

Prorating will update the guideline values based on the employee’s prorated salary. Enable **Force Default on Rating** change if the planner recommendation should reset to the guideline default value on performance rating change.

To prevent managers from going outside the maximum and minimum guidelines, enable the **Hard Limit**. Select **Warn** from **High/Low** action to display a warning when planners exceed the high and low guideline values.

---

**Warning:** Managers may be able to exceed the guidelines, but can be restricted by their budgets.
Guideline Formulas

Each rule has within it formulas. Clicking on the rule name brings up the interface where the admin can manage the formulas. For each formula the admin creates a formula name and then inputs the Rating range, and then defines the Min (minimum), the Low, the Default, the High and the Max (maximum) for the range.

**Note:** Formula name, Min, Default, and Max are required.

<table>
<thead>
<tr>
<th>Order</th>
<th>Formula Name</th>
<th>Rating</th>
<th>Min</th>
<th>Low</th>
<th>Default</th>
<th>High</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>merit_0</td>
<td>≥0 to &lt;1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>merit_1</td>
<td>≥1 to &lt;2</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>merit_2</td>
<td>≥2 to &lt;3</td>
<td>3</td>
<td>0</td>
<td>3</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>4</td>
<td>merit_3</td>
<td>≥3 to &lt;4</td>
<td>4</td>
<td>0</td>
<td>4</td>
<td>0</td>
<td>8</td>
</tr>
</tbody>
</table>

Figure 29. Guidelines

If the hard limit is chosen in the rules settings, planners will not be able to exceed the prescribed guidelines. The low and high values display a popup warning to the planner when he/she exceeds the inner limits. The default value automatically populates when the compensation forms are generated.

**Multi-Dimensional Matrix**

When a rule uses more than one attribute it is a multi-dimensional matrix. Each additional attribute is added as a column to the left of the ranges. The following example is a two-dimensional matrix that contains the attributes: Performance Rating and Job Level.
Performance Rating | Job Level | Min | Low | Default | High | Max
--- | --- | --- | --- | --- | --- | ---
>= 0 to <= 2 | Exec | 0 | 0 | 0 | 0 | 0
> 2 to <= 4 | Exec | 1 | 2 | 3 | 4 | 5
> 4 to < 5 | Exec | 3 | 4 | 5 | 7 | 8
>= 5 | Exec | 5 | 6 | 7 | 8 | 9
>= 0 to <= 2 | Manager | 0 | 0 | 0 | 0 | 0
> 2 to <= 4 | Manager | 0 | 1 | 2 | 2.5 | 3
> 4 to < 5 | Manager | 0 | 1 | 2.5 | 3.5 | 4
>= 5 | Manager | 2 | 3 | 4 | 5 | 5

Figure 30. Multi-Dimensional Matrix

**Updating Guidelines**

Add a new range of values by clicking **Add New Formula**. They can also click the icon to copy an existing row. Click the value cell to update formula name, employee attributes, and guidelines ranges. Finally, click the icon to remove rows. Don’t forget to click the **Save** button when you finish updating the matrix. Add one formula with attribute values. This will be assigned to employees who do not match any other formula.

Figure 31. Updating Guidelines

**Exporting and Importing**

If you use multiple employee attributes the guideline matrix can become unwieldy. It may be faster to export the matrix, update the values in Excel, and import the guidelines into SuccessFactors Compensation.
Click the **Export** button to save the guideline CSV to your computer. After you finish updating the values, click the **Import** button and select the CSV file to upload the guideline matrix.

![Table](image)

Figure 32. Exported Guidelines in .csv Format
Lab 10: Modifying a Guideline Matrix

(Continued from Lab 9)

In this lab, you will modify a guideline matrix to match the 2013 Board-approved merit guidelines.

1. Select **Guideline Matrix**.

2. Locate the **merit** rule.

3. In the Actions column select **Change Rule Settings**.

4. Enter **2013 Merit** in the Rule Name field.

5. Do nothing to Type, Formula Criteria, Mode, or Benchmark.

6. Select **Yes** for Hard Limit.

7. Select **Yes** for Prorating.

8. Select **Yes** for Force default on performance rating changes.

9. Select **Warn** for High/Low Actions.

10. Click **Save**.

11. Select the **2013 Merit Rule**.

12. Using the trashcan icon, delete the existing formulas.

13. Click **Save**.

14. If you receive an error, click **OK**.

15. Click **Add New Formula**.
16. Enter the values as approved by the Board below. After entering each formula, select **Add New Formula** for a new row.

<table>
<thead>
<tr>
<th>Formula Name</th>
<th>Performance Rating</th>
<th>Min</th>
<th>Low</th>
<th>Default</th>
<th>High</th>
<th>Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rating 0-2</td>
<td>&gt;= 0 to &lt;= 2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Rating &gt;2-4</td>
<td>&gt; 2 to &lt;= 4</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Rating &gt;4-&lt;5</td>
<td>&gt; 4 to &lt; 5</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Rating &gt;5</td>
<td>&gt;= 5</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
</tr>
</tbody>
</table>

17. Click **Save**

18. Click **Back**

**Job Aid:** Modifying a Guideline Matrix
Knowledge Check

1. What are guidelines rules and formulas?

2. What are the components of a guideline matrix?
Conclusion

In this lesson, you were introduced to the guideline matrix within a compensation plan template.

You should now be able to:

- Define compensation guidelines
- List the components of a guideline matrix
- Create and configure a guideline rule
- Import and export guideline matrices

In the next module, you will learn how create and fund budgets for compensation programs.
Lesson 2-5. Program Budgets

The goal for this lesson is to provide information about creating budgets for compensation programs in the Compensation Plan Template.

Objectives

Upon completion of this lesson, you will be able to:

- List three of the parts required to create a budget calculation
- Create budget rules enforcing adherence to the budget

Budget Overview

Each compensation form displays budget numbers which planners use in allocating compensation for their group. The budget is calculated by the system as a result of budget configurations done in the Compensation Plan Template. As planners allocate compensation their decisions are figured and display in the Total row.

Depending on an organization’s business requirements, budgets may be reconfigured for each compensation cycle. The most common budget and the easiest to manage is the one that applies a percentage increase across the board. It is easy to configure and easy to test.
Budget Calculations

SuccessFactors Compensation is very flexible and offers many different ways to set up budgets including custom fields, using lookup tables, and using families and groups. At its simplest a budget can be an across the board percentage increase. This requires the least amount of maintenance.

For complex budget calculations, ask your SuccessFactors consultant for guidance.

At minimum, budget calculations are composed of:

- Components
- The type of budget, known as mode
- The budget value
- The entity that the budget is based on

![Add Budget Calculation](image)

Figure 34. Add Budget Calculation

**Components**

**Components** are the different compensation programs that display on the salary worksheet. Each program can be separate or be combined with other programs into a single budget. For example, if “Merit” is funded separately from
“Promotion”, then the admin would create two budgets, one with a “Merit” component and another with the “Promotion” component. If the budget funds both merit and promotion, then the admin would select “Merit” and “Promotion” components in the same budget.

The bonus and stock worksheets each have only one component.

**Budget Mode**

There are four main compensation budget modes:

- PercentOf
- PercentofCustomField
- Guidelines
- DirectAmount

**PercentOf** calculates the budget amount per employee based on the specified percent of the selected field. The following fields support the **PercentOf** budget calculation. The field value must be defined in the UDF.

<table>
<thead>
<tr>
<th>PercentOf</th>
<th>UDF Column Heading</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Salary</td>
<td>SALARY</td>
</tr>
<tr>
<td>Merit Target</td>
<td>MERIT_TARGET</td>
</tr>
<tr>
<td>Lump Sum Target</td>
<td>LUMPSUM_TARGET</td>
</tr>
<tr>
<td>Lump Sum 2 Target</td>
<td>LUMPSUM2_TARGET</td>
</tr>
<tr>
<td>Bonus Target</td>
<td>BONUSTARGET</td>
</tr>
<tr>
<td>Custom Field</td>
<td>Defined in the Import Key under Advanced Options of the Budget</td>
</tr>
</tbody>
</table>

**PercentOfCustomField** calculates the budget on a custom field.

**Guideline** calculates the budget amount based on the default value of the employee’s assigned guideline.

**DirectAmount** is based on a specified amount in the budget configuration. This is typically used based on the planner to implement a top-down budget.
**Budget Value**

The budget value is the number the system will use for computing the budget when a value is needed. Use if the mode is **PercentOf** and enter the number. Other modes may not require completing the budget value.

**Based On**

The budget is based on the user, the group, the template, or the planner.

**User** – Creates a budget based on an uploaded field, amount or percent, in the UDF for each employee

**Group** – Creates a budget based on customer-defined groups. Useful in very large multi-national organizations it requires families and groups already configured.

**Template** – Creates the same budget for every employee in the compensation template.

**Planner** – Creates a budget for a specific planner. It is used for a top-down budget where we give a planner an amount to trickle down the reporting chain.

**Advanced Options**

Additional features are made available through the **Advanced Options**. The two commonly used options are **Include Ineligible** and **Prorating**.

**Include Ineligible** – Used to exclude ineligible employees and generally recommended

**Prorating** Can be used to prorate the budget in case the employee was hired midway during the year. The default is **No** but it is often used.

**UDF Custom Field** If using a UDF custom field for budget calculation, then you enter the custom field column header from the UDF into the **Import Key**.

**Base Custom Field** If you are using a custom column from Column Designer then you need to enter **Column ID** into **Base Custom Field**.
Family name is used with budget groups. Allocation Columns and Use Final Payout for VP Budgets are for Variable Pay.

Enforcing the Budget

Add a Budget Rule configures the system with two methods to enforce the budget. One warns or disallows planners from exceeding the budget. The other prevents saving a worksheet where the budget over the limits.

Admins may configure the system to allow or disallow a planner to exceed the budget. It may also control budget excess by preventing saving a worksheet that is over budget. The phrase that will display can be customized.
Lab 11: Add Budget Calculation for Merit and Lump Sum

(Continued from Lab 10)

In this lab, you will add a budget calculation for Merit and Lump Sum.

1. Select **Budgets**.

2. Select **Add Budget Calculation**.

3. In the **Mode** drop-down menu select **Percent of Cur Sal**.

4. Select **Salary** from **Use For** drop-down menu.

5. Select **Merit** and **Lump Sum** in **Components**.

6. Type in **4.75** in **Budget Value**.

7. Select **user** in **Based On** drop-down menu.

8. Select **See advanced options**...

9. Select **Yes** for Prorating.

10. Click **Save**.

**Job Aid:** Add Budget Calculation for Merit
Lab 12: Add Budget Rule

(Continued from Lab 11)

In this lab, you will set up a budget rule that warns the planner when he/she is over budget. Do not let the planner save the planning sheet when over budget.

1. Select Add Budget Rule.

2. Select salary from Use For field.

3. Select warn from Allow Exceed.

4. Select No from Allow Save on Exceed.

5. Click Save.
Knowledge Check

1. What are the parts required for a budget calculation?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

2. How is a budget enforced?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Conclusion

In this lesson, you were introduced budgeting methods and configuration.

You should now be able to:

- List three of the parts required to create a budget calculation
- Create budget rules enforcing adherence to the budget

In the next lesson, you will learn how to generate and manage compensation forms.
Lesson 2-6. Compensation Forms

The goal for this lesson is to provide detailed information on launching and managing compensation forms.

Objectives

Upon completion of this lesson, you will be able to:

- Grant compensation management permissions to planners
- Launch compensation forms
- Update and delete compensation forms
- Add employees to a compensation form
- Remove employees from compensation forms
- Move employees between compensation forms

Compensation Form Main Concepts

A Compensation Form is the actual planning sheet that the planner uses to determine and enter compensation recommendations. Forms are generated from the compensation plan template.

Testing

Throughout the configuration of the Compensation Plan Template, admins should create and delete forms multiple times to verify that the template is correct.

In configuring a template some changes will update automatically, others will require launching new compensation forms.

These changes require an admin to generate a new compensation form:

- Column Designer changes
- Changes to fields that are not marked as reloadable
- Basic plan template configurations
Instructional text

Updated budget configuration

Updated guidelines (if optimization is not checked)

These changes do NOT require a new compensation form:

Updated eligibility rules

Updated budget data changes

Updated guidelines (if optimization is checked)

**Compensation Management Permissions**

Compensation plan management permission allows compensation planners the ability to add comments within the Compensation forms. Permission is typically granted to all managers. If the manager is not a planner, then he/she will not see a compensation form.

**Note:** This permission does not mean giving an individual the ability to plan compensation. Compensation planners are designated upon implementation through the reporting structure or alternative method.

**Note:** It is recommended that this be done right before launching forms, as these permissions are not dynamic.

Permissions may be granted by group or by individual.
Lab 13: Administering Compensation Management Permissions for Groups

In this lab you will allow managers in your department to access the Compensation Module.

1. Navigate to Administration Tools > Compensation > Compensation Management Permissions.

2. Select With Direct Reports Only group from Select drop-down menu.

3. Select CompAdminTraining from the Filtered by All Locations drop-down menu.

4. Click Grant Compensation Management Permission.
Launching Compensation Forms

The Launch Compensation Forms mass generates all forms, based on the compensation plan template, for the identified compensation planners. Once forms are launched, the relevant forms display in the My Forms Inbox when a manager chooses the Compensation tab.

Mass Generating Worksheets

Launching forms is done on a one-page interface that asks for the template to be used, the name of the worksheet, dates for the start and end of the compensation cycle, date for the completion of recommendation, the name of the head of the hierarchy. A checkbox for Head of Planning only can be used to test compensation form settings or to provide a compensation cycle for only one manager. You can choose notify planners by checking the box “Send email notification to planners.”

![Launch Compensation Worksheets](image)

**Figure 37. Launch Compensation Worksheets**

**Best Practice:** To include a CEO in compensation planning create a user representing the Board of Directors as the top of the hierarchy.
Lab 14: Launch Compensation Forms

In this lab, you will launch compensation forms.

1. Navigate to Administration Tools > Compensation > Launch Compensation Forms.

2. In Step 1, select 2013 Compensation Plan in Plan Template drop-down menu.

3. In Worksheet Name, type in 2013 Training Compensation Plan.

4. In Step 2, set Start Date as 01/01/[Current Year].

5. Set End Date as 12/31/[Current Year].

6. Set Due Date as 30 days from today.

7. In Step 3, start typing in Alan Thompson, then select aathompson when it pops up.

8. Select Send email notification to planner(s), if desired.


Job Aid: Launch Compensation Forms.
Manage Compensation Forms

The Manage Compensation Forms interface provides a way for administrators to delete forms and to export them in either MS Excel format or in a .csv format.

The ability to delete forms is very useful for testing. Forms can be created and deleted at will. All compensation form data is lost upon deletion.

Figure 38. Manage Compensation Forms

Updating Compensation Forms for Template

Updating Compensation Forms refreshes the form data.

Since individual compensation forms are updated only when opened and saved, this function is recommended after an import of employee data and when performance review ratings are integral to the compensation planning process.
When updating the compensation form, admins can control how the SuccessFactors Compensation manages **New Hires, Changes in User’s Manager or Second Manager, Inactive Users or Planners, Changes in Eligibility**. It also allows for updating budgets, applying to complete compensation forms and sending notices to planners.

**Note:** Hold down shift key to select more than one compensation plan.

![Update Compensation Forms for Template](image)

**Warning:** Use this function carefully! Make sure you understand how the update will affect fields in the database. There is no easy way to undo the function.
Compensation Form Membership

All organizations are dynamic: employees come and go. They are hired, retire, get promoted, resign, and change positions. Admins can add members who have joined the organization, move members to new managers and compensation planners, and delete members who have left the organization.

SuccessFactors Compensation has three separate tools: **Add Members to Forms**, **Delete Members from Forms**, and **Move Members Between Forms**.

![Tools for Form Membership]

**Add Members to Forms**

To add a member, the employee must be in the SuccessFactors database. Find the person, select the appropriate template and a drop-down list of planners using the template is populated. Select the correct form, decide whether to send email and click the **Add** button.
Admin Tools

Back to Admin Tools

Add Members To Forms

Add member(s) to existing forms

User: [Field]
Compensation Template: [Dropdown]
Compensation form: [Dropdown]
Send email notification:
Add

Delete Members

Deleting members is a reverse process. In the Delete Member from Forms tool select the Compensation Template, select the Compensation form, choose the member to delete, choose whether to delete budget and if email notification is to be sent and click on the Delete button.

Delete Members From Forms

Delete member(s) from existing forms

Compensation Template: [Dropdown]
Compensation form: [Dropdown]
Choose member(s) to delete:
- Judy Hoffman
- James Reed
- Harry Wilson

Delete budget as well
Send email notification to current reviewer of the affected compensation form
Delete

Figure 41. Add Members to Forms

Figure 42. Delete Members from Forms
Move Members Between Forms

The Move Members Between Forms works in the same way. In the tool, select the Compensation Template from the drop-down menu. Then select the compensation form that the member is currently on (Source Form), select the compensation form to which the member is moving (Target Form), choose the member(s) to move, select the email notifications desired and click Move.

Figure 43. Move Members Between Forms
Knowledge Check

1. Permission granted to compensation planners allows them to:

2. Which statement is true?
   a) Once forms are launched, no changes can be made.
   b) Once forms are launched, some fields may be changed and the forms will update dynamically.
   c) Even though forms are launched, all changes can be made without affecting the compensation cycle.
Conclusion

In this lesson, you were introduced to the admin role in launching, managing, and deleting compensation forms.

You should now be able to:

- Grant compensation management permissions to planners
- Launch compensation forms
- Update and delete compensation forms
- Add employees to a compensation form
- Remove employees from compensation forms
- Move employees between compensation forms

In the next module, you will learn how to run compensation reports and generate statements.
Module 3. Compensation Reports

This module contains the following lessons.

- Lesson 3-1: Roll-up Reports
- Lesson 3-2: Exporting Aggregated Compensation

Objectives

Upon completion of this module, you will be able to:

- Identify the rollup reports available in SuccessFactors Compensation
- Export aggregated compensation data
Lesson 3-1. Rollup Reports

The goal for this lesson is to provide details about how reports can be generated.

Objectives

Upon completion of this lesson, you will be able to:

- Identify what the Summary tab displays
- List the two types of Executive Review permissions
- Grant Executive Review permission for an individual user
- Run the compensation rollup report

Summary Tab

Planners can view the final figures for their form by selecting the Tab labeled Summary. The application displays the totals each of the programs and totals for compensation and the group. It also displays budget information.

Figure 44. Summary Tab

In the bottom right-hand corner, a button allows for exporting this sheet as an MS Excel file.

Figure 45. Export Button on Summary Tab
Executive Review

Executive Review allows a manager to drill down the planning hierarchy and view compensation decisions. While similar to the summary report, it also allows the manager to drill through the reporting hierarchy. Executive Review is based on the current reporting structure (not the reporting structure at the time of the compensation cycle). It is accessed as a tab at the top of the page.

Figure 46. Executive Review Tab

Granting Permissions

Access to Executive Review requires permission. Human Resource reps are often given permission for those employees whom they represent. Permission can be given for read-only or to edit compensation plans.

Best Practice: Executive Review is an effective way to limit the number of steps in a route map, yet allow for feasibility and review of compensation decisions by those at higher levels within an organization.
Lab 15: Grant Executive Review Permissions for an Individual User

In this lab, you will grant Executive Review Permissions to Mandy Sampson.

1. Navigate to Administration Tools > Compensation > Compensation Executive Review Permission.

2. Select Manage Executive Review permission security through individual users.

3. Select Others from the Template menu then 2013 Compensation Plan.

4. Type in Mandy in the First Name field.

5. Select Mandy Sampson from the names that display.


7. Click checkbox next to Mandy’s name under Select All.

8. Click Grant Permission.

Job Aid: Grant Executive Review Permissions for an Individual User
Compensation Rollup Main Concepts

Compensation Rollup provides a summary view of compensation data and budget information. It allows the admin to see exactly what the compensation planner sees through the drill-down capability and is most commonly used to check budget adherence and specific forms. It is an alternative to Executive Review. This report can also be exported in Excel format. For planners, it can be found on the Report tab of the Forms page. Admins can run the compensation rollup report for a specific planner.

![Compensation Rollup Interface](image)

Figure 47. Compensation Rollup Interface
Lab 16: Displaying and Drilling Down in the Compensation Rollup Report

In this lab, you will view a Compensation Rollup Report starting with Alan Thompson and drill down.

1. Navigate to Administration Tools > Compensation > Compensation Rollup.

2. Type aathompson.

3. Click Find Plans.


5. Click the magnifying glass icon to the left of Marla Gibbs Team Total.


7. Close the window.

Job Aid: Compensation Rollup Report
Knowledge Check

1. The Summary tab of Compensation is a summary of what?

2. What are the two types of Executive Review permissions?

3. How can Executive Review be used?
Conclusion

In this lesson, you were introduced to the admin ability to display compensation rollup.

You should now be able to:

- Identify what the Summary tab displays
- List the two types of Executive Review permissions
- Grant Executive Review permission for an individual user
- Run the compensation rollup report

In the next lesson, you will learn how to run admin reports.
Lesson 3-2. Exporting Aggregated Compensation Data

The goal for this lesson is to provide detailed information about exporting aggregated compensation data in SuccessFactors.

Objectives

Upon completion of this lesson, you will be able to:

- Export aggregated compensation data
- List the available options

Aggregated Compensation Data Main Concepts

The Compensation Aggregate Export tool allows admins to export all of the compensation data within the system. The data is exported in the SuccessFactors file format, “.v4e” or the MS Excel format, “.csv” format. Since the report runs on the reporting server, it can be accessed from Scheduled Reports page once completed.

Managing a “.v4e” File Format

This file format, “.v4e”, is a SuccessFactors file format created by our engineers to handle files of over 100,000 records. Microsoft Excel has a difficult time managing very large files because the system must hold the entire results in memory to do the formatting. To cut down on processing time and file size, the SuccessFactors application saves the file or report as a .v4e file. The “.v4e” format uses a “^” as the delimiter. “.v4e” files are similar to csv flat files that use this different delimiter. In order to open and view “.v4e” files in Excel, you need to first convert them to “.xls” file format.

For more information on converting “.v4e” files to “.csv” files, visit the knowledge base for SuccessFactors customers.
Options

Several configuration options that are available to the admin include:

- **Include All User Info**: Contains all the users’ data in user import file as well as data from the compensation form.

- **Include User Goals**: Applies only when the MBO capability is enabled in the Compensation Planning module.

- **More Options**: Provides three date fields to control which data is exported: one, two, or three of these fields may be used.

**Note**: If a date option is not used, then all compensation forms, including those not yet completed, will be included in the export.

Conclusion

In this lesson, you were introduced to the export function for compensation data. Step-by-step instructions were provided to select the options to control the export.

You should now be able to:

- Export compensation data
- List the available options
Knowledge Check

1. What options are available for admins in running the Compensation Aggregate Export?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________
Notes
Course Summary

Through lecture, exercises, and hands-on computer lab work, this course taught you the basic functionality of SuccessFactors Compensation Management. You developed a working knowledge of this functionality for use in implementation of your organization’s compensation strategy.

You should now be able to:

- Define SuccessFactors Compensation related terminology
- Upload the User Data File (UDF) and market data
- Identify the roles and responsibilities for SuccessFactors Compensation
- Describe the relationships between compensation plan templates, compensation forms, and planning sheets
- Identify and describe compensation programs
- Edit and clone the compensation plan templates
- Create eligibility rules, budgets, and guidelines for salary, bonus, and stock programs
- Modify and manage reporting of compensation to planners and to employees
- Generate compensation forms for the compensation planners
- Add standard and custom fields to the salary, bonus, and stock sheets
- Run compensation reports
Notes