THR70

SAP SuccessFactors Incentive Management Academy

COURSE OUTLINE

Course Version: 2411
Course Duration:

SAP Copyrights, Trademarks and Disclaimers

Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation	
Demonstration	
Procedure	
Warning or Caution	
Hint	
Related or Additional Information	
Facilitated Discussion	
User interface control	*Example text*
Window title	*Example text*

Contents

Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

UNIT 1

Getting Started with SAP SuccessFactors Incentive Management

Lesson 1: Getting Started with SAP SuccessFactors Incentive Management

Lesson Objectives

After completing this lesson, you will be able to:

- Name the features and functions of Incentive Management
- Describe the incentive compensation process

Lesson 2: Technical Overview

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the technical components of Incentive Management

Lesson 3: The Incentive Management Portal

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the components of the Incentive Management Portal

Lesson 4: Navigating the User Interface

Lesson Objectives

After completing this lesson, you will be able to:

- Navigate the user interface
- Name the key workspaces in SAP SuccessFactors Incentive Management
- Set user preferences

UNIT 2

Starting the Implementation

Lesson 1: System Preferences

Lesson Objectives

After completing this lesson, you will be able to:

- Update system preferences

Lesson 2: Calendars and Global Values

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the purpose of the calendar
- Present a scenario in which multiple calendars are used
- List global values and their purposes

Lesson 3: Security

Lesson Objectives

After completing this lesson, you will be able to:

- Develop a security structure using business units and roles
- Create a role and set permissions

Lesson 4: Processing Units

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the use of processing units

Lesson 5: Customizations

Lesson Objectives

After completing this lesson, you will be able to:

- Activate and relabel generic attributes, numbers, dates, and Boolean

Lesson 6: Data Integration

Lesson Objectives

After completing this lesson, you will be able to:

- Determine the best data integration option for an implementation
- Configure an integration scenario using Express Data Loader (XDL)
- Upload data using XDL
- Use the validate and transfer pipeline task to import data from staging to production
- Purge import data
- Extract payment data using XDL

UNIT 3 Working with Compensation Elements

Lesson 1: Managing Organization Data

Lesson Objectives

After completing this lesson, you will be able to:

- Manage organization data
- Search for records in a workspace

Lesson 2: Managing Versions and Effective Dates

Lesson Objectives

After completing this lesson, you will be able to:

- Add an effective version to a participant record

Lesson 3: Using Roll Relationships

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the purpose of roll relationships

Lesson 4: Managing Classification Data

Lesson Objectives

After completing this lesson, you will be able to:

- Manage classification data
- Create a category hierarchy

Lesson 5: Compensation Elements

Lesson Objectives

After completing this lesson, you will be able to:

- Define and create compensation elements

Lesson 6: Variables

Lesson Objectives

After completing this lesson, you will be able to:

- Create variables

UNIT 4

Creating and Managing Compensation Plans

Lesson 1: Analyzing Compensation Requirements

Lesson Objectives

After completing this lesson, you will be able to:

- Create a compensation plan analysis
- Name the steps of the process flow of a compensation plan

Lesson 2: Overview of Compensation Plan Rules

Lesson Objectives

After completing this lesson, you will be able to:

- Name the types of compensation plan rules

Lesson 3: Credit Rules

Lesson Objectives

After completing this lesson, you will be able to:

- Create a direct and indirect credit rule

Lesson 4: Measurement Rules

Lesson Objectives

After completing this lesson, you will be able to:

- Create a primary measurement rule
- Create a secondary measurement rule

Lesson 5: Incentive Rules

Lesson Objectives

After completing this lesson, you will be able to:

- Create incentive rules
- Create a per-credit commission incentive rule

Lesson 6: Deposit Rules

Lesson Objectives

After completing this lesson, you will be able to:

- Create a deposit rule
- Describe the use of Earning Groups and Earning Codes

Lesson 7: Assigning Variables

Lesson Objectives

After completing this lesson, you will be able to:

- Assign rule elements to variables in a compensation plan

UNIT 5 Calculations and Results

Lesson 1: Overview of the Pipeline

Lesson Objectives

After completing this lesson, you will be able to:

- List the various tasks that use the pipeline

Lesson 2: Calculation Run Preferences

Lesson Objectives

After completing this lesson, you will be able to:

- Use system preference to fine-tune calculation behavior

Lesson 3: The Compensate and Pay Sequence

Lesson Objectives

After completing this lesson, you will be able to:

- Name and describe the stages of the compensate and pay sequence of the pipeline

Lesson 4: Calculation Results

Lesson Objectives

After completing this lesson, you will be able to:

- Review calculation results and log files
- Define payments and balances
- Describe the functionality of the post and finalize tasks
- Manually create and adjust transactions, credits, and deposits

UNIT 6 Communicating with your Payees

Lesson 1: Configuring Communication options

Lesson Objectives

After completing this lesson, you will be able to:

- Enable or disable plan communicator features
- Designate a proxy

Lesson 2: Creating a Document Distribution

Lesson Objectives

After completing this lesson, you will be able to:

- Create a document that communicates a compensation plan to payees
- Create a document distribution with a workflow

Lesson 3: Managing Disputes and Inquiries

Lesson Objectives

After completing this lesson, you will be able to:

- Configure a dispute template

Lesson 4: Creating Dashboards

Lesson Objectives

After completing this lesson, you will be able to:

- Create dashboards
- Enable the release periods feature in dashboards
- Identify the various types of widgets

Lesson 5: Modeling in Incentive Management

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the purpose of the Modeling feature
- Set the Permissions needed to use the Modeling feature
- Create and run a Model
- Manage notifications

UNIT 7

Embedded Analytics

Lesson 1: Overview of Embedded Analytics

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the difference in use cases between Dashboards and Embedded Analytics

Lesson 2: Administering Embedded Analytics

Lesson Objectives

After completing this lesson, you will be able to:

- Manage user permissions

Lesson 3: Creating and Sharing Stories

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the data models available with Embedded Analytics
- Create a story in Embedded Analytics

Lesson 4: Scheduling and Publishing Stories

Lesson Objectives

After completing this lesson, you will be able to:

- Schedule a publication

UNIT 8

Appendix

Lesson 1: Business Units

Lesson Objectives

After completing this lesson, you will be able to:

- Identify Business Unit Object Relationships