

## Q4 2019 SuccessFactors Review

### Compensation Management & Variable Pay

- *Ruben Beeck*

The Q4 release for Compensation (covering Compensation, Variable Pay and Reward & Recognition) is a major release primarily focused on Reward & Recognition, as many new features and enhancements are now available to customers. In addition, a number of new features offer enhancements to the user experience for Compensation and Variable Pay. We will highlight below, the most important new features based on our experience of their relative importance for our customers. As always, we encourage you to read the full list to identify the topics relevant for your implemented solution.

#### Selecting Single Employee when Publishing back to EC

When publishing back the adjusted salary from Compensation to EC then before the release it was possible to select either all worksheets or selected worksheets based on organization structure (*Figure 1*) for this feature.

With the new release it is now possible to further define granularity level down to individual employee when publishing back to EC. The advantage here is that if you experience e.g. incorrect data in EC after publishing back you don't need to publish for all employees once again but can select individual employee for this feature.

Furthermore, the release brings also the option to use one custom field as 'filter' when defining the population for the publishing process. Especially the last option should be considered when defining new solutions, so customer relevant field is selected here.



- *Value people*

Plan Setup

Publish Data ▾ Rewards Statements ▾

Publish Selected Worksheets in Employee Central

Employee:  [Find Employee](#)

Division:  ▾

Department:  [Custom Select >>](#)

Location:  [Custom Select >>](#)

Figure 1: Worksheet Publishing

## Lookup Table Encryption

Given the sensitive nature of Compensation information, there is an interesting new feature allowing encryption of input values in a lookup table, so these values are not visible for the end-user. We have not so far been met with this requirement, but with the extensive use of lookup tables in the solution provided to many customers we expect this could come in handy in certain companies for certain solutions.

The switch is set in Company Settings in Compensation Admin so this will cover all templates in the instance. Whilst this might be disadvantageous to system performance on very large tables, our experience is that customer lookup tables are usually not that extensive.

## Further Enhancement to People Analytics

SAP SuccessFactors are focussed on improving reporting in SuccessFactors. In addition to Ad Hoc Report Builder and Online Report Designer there is a new tool, People Analytics, that appears to be a fantastic enhancement in reporting. In Q4 the tool will be made generally available to all customers but rolled out per datacentre which means availability on a customer by customer basis is not yet known. Based on what we know so far, we can hope for 'cross-template' reporting and

'cross-domain' as well which should improve aggregated reporting on all compensation data for a company with joins also to Employee Central data.

Furthermore, field-based permission will be respected, and force-comments (from budget and guideline violations) that today are difficult to pull into report, will now be available for reporting. Enhanced reporting on Spot Awards (aka Reward & Recognition) will also be available, a customer requirement that has not previously been met.

In addition to the above we can also foresee that these reports can be 'wrapped' into pivots, aggregation and with layout options so visualization to end-user will be 'top notch'.

## What is not in place yet

Translated generic objects from Employee Central are not pulled into the report, so only the object codes not the object descriptions will be visible. Bonus plan names seem also to be missing which will likely mean that there will be an ongoing challenge to identify/relate the data below the bonus plan, hopefully this will be addressed soon. Rating labels will be missing in certain designs, likewise metrics for goal payout (Min/Target/Max) are also not reportable yet. Last but not least, route map step names and descriptions are not reportable either. But we expect that SAP SuccessFactors will enhance solution further in following releases so that these missing items can be included as well.



People Analytics will also not include solutions where Global Assignment and Concurrent Employment has been activated. Based on our experience this could be a challenge for certain customers, but these attributes are not extensively used.

## Bulk Print of Statements from within Executive Review

This feature is quite interesting as it is now possible for certain key resources to bulk print all statements for employees contained in the Executive Review report. This is interesting as permission for access to Executive Review is granted independently of being part of the compensation process. So certain key resources can, after the process is completed, go into the Executive Review report and print all statements for the target population shown in the report for those employees where a statement has been generated.

The feature can be used for Compensation, Variable Pay and Combined statements. There is currently a limit of 3000 statements at a time, but SuccessFactors promise this number will increase in a future release. With this feature central end-users can now gain access

to print the statements without letting them into the compensation admin tool to which end-users should not have access. The access will only be for the target population defined in Role-Based Permission so there is no risk that this employee sees salary information for employees outside of his/her organisational structure.

## Total Compensation Template Custom Validations

SAP SuccessFactors are continuing the work to make the complex Total Compensation template easier to configure for customers. In the last release (Q3) they added some custom validation options that can be used for controlling user input and improve data quality. In this release this has been further enhanced so that the Total Compensation form fields can include custom validation code (*Figure 2*). We believe it will make it easier to validate the template.

Added to this if an end-user encounters multiple validations at the same time, then the message on the screen will not be given in multiple windows one by one but will be collated into one single window. This is a much-improved user experience.

Custom Validation ? Type  No validation  Warning  Error

Formula `if(extra = 0, 'true', if (payGrade != finPayGrade, 'true', false'))`

Use a field: extra [Statutory Increase]

Language	Message
Default	No changes in job level?

Figure 2: Worksheet Publishing



Similar to budget validations there are two types of validations: warning and error (Figure 3). **Warning** allows end-user to continue despite the warning and layout is blue

background and red text. **Error** will not allow end-user to continue without correcting the issue. Here the layout of the box is red shading and red text to emphasize the message.

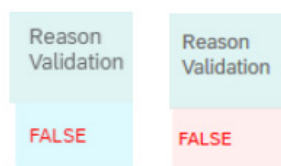


Figure 3: Worksheet Publishing

## Limitations

These validations are only supported for Compensation and Total Compensation templates, so Variable Pay cannot make use of this. There is also a limit of up to three validation rules per template which we would normally consider to be sufficient as end-users probably would dislike being 'disturbed' over and over again. These validations can also only be utilized on custom, reportable and read-only fields.

## Aligning Total Compensation cycle with other template types

In addition to the above, an enhancement has also been reported, that in the future it will now be possible to either upload a new Total Compensation template or to upload a customer template that has been tested in preview or test instance. So, the cycle for Total Compensation will potentially now be the same as for Salary and Variable Pay

## Enhancements for Reward and Recognition

Finally, we review the area where SAP SuccessFactors have delivered most new functionality and enhancement in this release.

### Cashless recognition

In last release it was announced that Reward

and Recognition would in the future support also point-based programs. The idea here is to allow certain larger companies to partner with suppliers supporting cashless recognition. Now this will be further enhanced and enabled so companies can choose between relevant partners that are in alliance with SAP SuccessFactors.

The reward could be in the form of Points or Gift cards that can then be redeemed with partners.

### Categories and Levels – image option

There is now added support for admins to select and upload company relevant images for the definition of categories and levels as part of the spot Awards program. This will definitely improve the user experience via the graphical expression of the program available when working on rewarding employees and presenting the end result for the employee.

In addition to this, categories, levels and points can now be localized so employees in non-English speaking countries can work with categories and levels in their own language. This opens an option to also change labels into company/country relevant vocabulary e.g. kudos instead of points. Please note that translation option only exists for current categories and levels in default language. New categories and levels can still only be created in default language.



## Redemption options

Now that SuccessFactors have added the option to also honour employees via certain gift programs, then it is logical also to improve the way that employee can redeem these gifts. So, if partner collaboration is in place, it can now be configured so that the employee can redeem gift cards from one partner and merchandise from another partner. This can also be reflected geographically. The results can be presented as a tile to be shown on the employee's home screen in SuccessFactors.

## Spot Award relevant action search

Linked to the improvements for the Spot Awards program, SuccessFactors has also added an option for improved search in the Action search bar. Not many customers know there is an existing option to add company-relevant search words, so it is easier to find the relevant items in SuccessFactors. Now also Spot Awards Categories and Levels have been added to this feature so it will be easier for managers to find the relevant content among potentially many spot awards programs (and categories/levels) enabled within the company.

## Minor Enhancements

Below is listed some of the most important and relevant enhancements based on our experience working with our customers.

### Added target population for Compensation Audit report

Before this release when running an Audit report (a great feature) there were no limitations concerning the target population. This will now change so the target population for the user running the report will be respected. We expect this to be important for the customers because in the future report can be generated locally per country or per company without violating confidentiality regarding salary data.

## User purge from live worksheets

Before this release, on executing a master data purge with Data Retention Time Management (aka DRTM) employees in worksheets not yet completed were removed from these worksheets. This could be confusing to managers and admins alike. Now as a default the system will not remove employees from worksheets that are not completed yet. Instead they will be listed in a preview report and each employee can be handled one by one.

Linked to this there is now also an option to delete employees from completed worksheets. It makes sense in conjunction with data purge as mentioned above, but we do not expect customers on a wider scale to utilize this feature as companies often request to store historical data at least for some years.

## Conclusion

There is a wide mix of functional and user experience updates this Q4 release with some definite improvements in the Compensation module.

Please note that SAP SuccessFactors has announced that it will not any longer support a pattern of quarterly releases but instead turn to a bi-annual schedule. We believe this is good news as this gives both partners and customers sufficient time to test and adapt new functionality. In 2020 there will be releases in May and November which we anticipate to contain many more new features. We look forward to what will arrive in May (with Preview arrival about four Weeks prior).

As announced many times before by SuccessFactors then 'Live Analytics' feature will be retired with Q2 2020 release. We believe few of our customers are using this feature and will need to take action.



## How Can We Help?

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- **Support Services** - for if you are already using SAP SuccessFactors and want a flexible support partner.
- **Release Management Services** - for if you are struggling to take advantage of the quarterly innovations in SAP SuccessFactors.
- **Business Process Services** - for if you are looking for operational support with your HCM processes.
- **Training Services** - for if you are not getting the most out your SuccessFactors system.

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