This document outlines various scenarios when relaunch of worksheets is necessary when changes are made to the template and a brief compensation cycle preparation guide that summarizes several tasks that need to be configured and verified before the launch of your compensation cycle.

Updating Worksheets Changes and Effect on Live Forms

Changes to data are inevitable. When changes are made during the compensation cycle, in-progress worksheets need to be updated.

Some changes in the data will reflect automatically (upon opening/refreshing in-progress forms) but some needs to be pushed manually. This list shows some updates and how they affect live forms.

**Changes and Effect on Live Forms**

|  |  |  |
| --- | --- | --- |
| **Change** | **Does it affect live forms?** | **If Conditional, what's the condition?** |
| Add/Edit Guidelines | Yes/No | Yes - when Enable Guideline Optimization setting is turned on, changes to guidelines (adding or updating) will affect live forms without the need to create forms. |
| Add/edit eligibility rules | Yes/No | Yes - Must use the Update process to affect live forms |
| Standard field/column data updates | Yes/No | Yes - Some fields/columns will update in live forms, like curSalary and pmRating. Check the "Reloadable" column of the Standard Column Appendix in the Implementation Guide to confirm. |
| Custom field with Import Key - UDF updates | Yes/No | Yes - only if set to Read Only and Reloadable |
| Custom field with formulaic calculation of other fields | Yes/No | Yes - if the fields in the formula are reloadable. Changes will affect live forms. |
| Edit data affecting budgets | Yes/No | Yes - Depends on whether the fields which contribute toward the budget are reloadable |
| Addition of goals in PM Forms | Yes/No | Yes - Must use the Update process |
| Add new fields/columns | No | Relaunch the forms. |
| Edit field/column attributes in Design Worksheet | No | Relaunch the forms |
| Make XML changes | No | NOTE: See the Guideline Optimization condition - this would affect changes to guidelines in XML as well |
| Add Budgets | No | Relaunch the forms |
| Edit Budgets | No | Relaunch the forms |
| Custom field with Lookup table - Lookup table updates | Yes | Changes are reflected on live forms, without any update of worksheets. |
| Pay Matrix/Currency Conversion updates to existing tables | Yes | Changes are reflected on live forms, without any update of worksheets. |
| Change in PM ratings | Yes | Yes – when “completed only” set to “No”. Changes in the PM ratings will affect the live comp forms. |

Note: Any changes to the template after the launch of the worksheets, will not affect the live forms. The forms need to be deleted and relaunched.

Compensation Cycle Preparation Guide

**Full Reference Guides Available Online at:** [**Admin Reference Guides**](https://help.sap.com/viewer/p/SAP_SUCCESSFACTORS_COMPENSATION)

* Create an overall project timeline that meets your companies go-live



* Create [copy new template](https://launchpad.support.sap.com/#/notes/2084065)
* Create [New Currency Conversion Table](https://launchpad.support.sap.com/#/notes/2084621) & link to your new template
* Create [New Pay Matrix](https://launchpad.support.sap.com/#/notes/2084246) & link to your new template
* Create [New Lookup tables](https://help.successfactors.com/?title=3Knowledge_Base/Compensation_%26_Variable_Pay/Compensation:_Manage_Data_-_Manage_Lookup_Table) (if configured) & link
	+ Update any references in template and formulas that reference the lookup tables
* Plan Setup > [Settings Screen – Check common settings](https://launchpad.support.sap.com/#/notes/2085227)
	+ Enable Guideline Optimization
	+ Select NEW Currency table
	+ Select NEW Pay matrix
	+ If using [proration adjust dates](https://launchpad.support.sap.com/#/notes/2084255) for your fiscal year
	+ Check if you want to use [Field Based Permissions](https://launchpad.support.sap.com/#/notes/2091568) and the required groups
* Update [Rating Sources](https://help.successfactors.com/?title=3Knowledge_Base/Compensation_%26_Variable_Pay/Compensation:_Worksheet_Design_-_Rating_Sources): Either..
	+ link to new PM template
	+ or if using Import Key link to new field and update rating scale
	+ or if using [comp rating](https://launchpad.support.sap.com/#/notes/2645477), check the rating scale in the xml
* Update/Create and Apply [Eligibility Rules](https://launchpad.support.sap.com/#/notes/2084628) as needed
* Update/Create [Guidelines](https://launchpad.support.sap.com/#/notes/2084192) as needed
* Verify Columns, labels and table references in formulas
	+ Check individual field formulas
	+ Create new [import Key](https://launchpad.support.sap.com/#/notes/2084190) fields unique for this cycle and update on template
	+ Use [Compensation & Variable Pay check tool](https://launchpad.support.sap.com/#/notes/2643643) for invalid configuration, reportable fields, reloadable fields
* Update or verify [budget](https://launchpad.support.sap.com/#/notes/2084157) information.
	+ Has your % of Salary value changed this year?
	+ Do your [budget groups](https://launchpad.support.sap.com/#/notes/2084214) need to be updated?
* Update [Instructional text](https://launchpad.support.sap.com/#/notes/2085239) on each screen as needed
* Validate and import planner/manager hierarchy data (Tip: Use [Read only HBA](https://launchpad.support.sap.com/#/notes/2085316))
	+ Use [Compensation & Variable Pay check tool](https://launchpad.support.sap.com/#/notes/2643643) for checking hierarchy cycle, inactive managers, no managers
* Import [compensation data files](https://launchpad.support.sap.com/#/notes/2084020)
* Update and verify your Job Code and Pay Grade Map data as needed if using [Promotion tool](https://launchpad.support.sap.com/#/notes/2084813)
* Confirm your linked route map has desired steps for this cycle
* [Group Management:](https://launchpad.support.sap.com/#/notes/2085306) If used for guidelines or budgets make sure groups are updated
* Optimize your template’s [Advanced Settings](https://launchpad.support.sap.com/#/notes/2085227)
* Check [Planner permissions, executive review permission, and reporting permissions](https://launchpad.support.sap.com/#/notes/2084650)
* [Update Statements](https://launchpad.support.sap.com/#/notes/2085136) to support any design changes in your templates
* Test entire program including [detail report](https://launchpad.support.sap.com/#/notes/2084859), [YouCalc widgets](https://launchpad.support.sap.com/#/notes/2084913), [comp aggregate export](https://launchpad.support.sap.com/#/notes/2084829), [ad hoc reports](https://launchpad.support.sap.com/#/notes/2084827)
* Revisit the table in this document to make sure all the configuration is valid, so you don’t have to relaunch the worksheets.
* Worksheets not creating? See [troubleshooting solutions](https://launchpad.support.sap.com/#/notes/2084007)

For more help:

[Compensation Quick Answers](https://community.successfactors.com/t5/Compensation-Quick-Answers/bd-p/Comp_Quick_Answers) - Monitored by Customer Support for simple how to questions

[Expert Chat](https://launchpad.support.sap.com/#/expertchat/entry) - SAP’s live chat function that instantly connects you to technical experts

**Admin Cheat Sheet**

For those administrators that are well trained and are very familiar with their programs who only need a high level reminder we provide this cheat sheet for you. This cheat sheet condenses all of the Conmp Admin guides (over 100 pages of content) into a single page document to aid you in quickly completing your year-over-year changes. [**Click here to access the Admin Cheat Sheet**](https://launchpad.support.sap.com/#/notes/2083967)

**Preparing to Relaunch Your Program Powerpoint**

For administrators that need more detail than the cheat sheet we have prepared this 50+ page powerpoint presentation that details the most common elements of your program that will need to be updated when copying an existing program. This PPT includes screenshots and step-by-step instructions for common updates your program may need. Click here to download [**Comp\_Cycle\_Prep\_\_Customer 2014V3.pptx**](https://video.support.sap.com/SuccessFactors/SUCCESSFACTORS/SF_COMPENSATION/Comp_Cycle_Prep__Customer_2014V3.pptx)

**Pre-Cycle Questions**

* Are you launching to the same group as last year or is it changing this year (impact on custom filter for choosing target populations)?
* Do you plan on launching forms in one language or multiple languages (impact on worksheet creation and configuration)?
* Are  you going to feed the ratings to an external system (impact on Ad Hoc Reports and Quartz scheduling)?
* How did your company manage hierarchy changes last cycle and is it changing (impact on FTP/import settings and/or Employee Change Engine).
* Has the timeline for your cycle changed (both for when cycle is starting and the amount of time spent in each cycle phase)?
* Have business drivers changed in the last year that are impacting the way you would like to measure performance? (goal-focused, competency-focused, etc)
* Has your approval process changed in the past year?  (route map changes)
* Will you be using our Calibration tool this year? Be sure to build this into testing an planning.
* Are you planning on making changes yourself using the new powerful Admin Tools Self-Service options? If so, please do not make the common mistake of leaving it to the last minute.You should build into your timeline as much if not more time as you would need if getting SuccessFactors to create your plans for you (1 month minimum). Why? To ensure that if anything goes wrong during testing that you have ample time to engage Support to have changes or issues addressed.

**Upgrade Center**

Please [**visit the Upgrade Center**](https://launchpad.support.sap.com/#/notes/2116689) **in admin tools** and determine what new features exist that you can enable before entering your cycle.

Notable features we recommend all clients upgrade to without delay are:

* Compensation Admin 2.0
* Compensation Profile

### Critical Checklist for All New Cycles

**Tip:** Begin your planning immediately following your annual cycle

* **Do NOT reuse the same compensation template unless you understand the possible negative impacts.**
* It is a best practice to create a copy of your last template for your new cycle as opposed to relaunching the same template.
* Your new template may also need to be connected to the new PM template you have likely created for this cycle. (which may in-turn need to be connected to new goal plans)
* Your new cycle will likely require previous reports are updated and linked to the new templates. This ensures that reports will not pull in old data from previous cycles.
* Create new [currency conversion table](https://launchpad.support.sap.com/p/sap/support/notes/2084621), [new pay matrix](https://launchpad.support.sap.com/#/notes/2084246), and [new lookup tables](https://launchpad.support.sap.com/#/notes/2084227).
* Link your new [**Rating Sources**](https://launchpad.support.sap.com/#/notes/2084806)
* Update or create [**Guidelines**](https://launchpad.support.sap.com/#/notes/2084192) as needed
* [**Enable Guideline Optimization**](https://launchpad.support.sap.com/#/notes/2084196) **for your templates.** Not only will this improve performance it will enable you to update live forms as the guidelines will be stored in a way we can update live forms.
* [**Optimize your Comp Template settings**](https://launchpad.support.sap.com/#/notes/2085227). Click link to see recommended settings. Note: When you copy a template, the template settings will not be copied so you need to check your settings from last year, and then set your new template as needed.
* [**Permissions:**](https://launchpad.support.sap.com/#/notes/2084650) How to set permissions for administrators, users and planners.
* [**Planner Mode**](https://launchpad.support.sap.com/#/notes/2085341)**:** For compensation processes where you launch forms based on planner, you will need to **update your import file COMPENSATION\_PLANNER\_xx field.**
* [**NEW UNIQUE IMPORT\_KEYS**](https://launchpad.support.sap.com/#/notes/2084190)**:** We recommend you always copy the template to create a new template for each cycle, and then within each new template reference NEW UNIQUE IMPORT\_KEYS. This prevents data imports from accidentally overwriting last year's data which is non-recoverable! Unique IMPORT\_KEY fields on each cycle allows you to define new columns in your compensation import for each cycle and avoid any problems with data from one program ever affecting another.
* **Check the reporting hierarchy** of each employee.
* **Tip:** One new feature that can be leveraged to make planning easier is **"Enable Compensation View Only Mode for Hierarchy Based Approvals".** You can enable HBA view mode from Admin Tools. Select your template and from Advanced Settings select **Enable Compensation View Only Mode for Hierarchy Based Approvals.** Even if you do not want to plan by HBA mode you can still leverage it for view purposes only which can make planning easier.
* Are you using the recommended option SECOND\_MANAGER? If not you may want to consider this change.
* If you have a compensation template that is using the [**SECOND MANAGER**](https://launchpad.support.sap.com/#/notes/2085287) update your file and import a fresh, valid, hierarchy before launching any forms.
* Update the current data of the employee for Salary, Job level, Pay Grade etc. **before** mass creating comp forms.
* Evaluate your budget setup, % values for current cycle and if the [**budget totals**](https://launchpad.support.sap.com/#/notes/2084157) are correct.
* **Proration:** If your program uses [Salary Prorating](https://launchpad.support.sap.com/#/notes/2084255) remember to update the start and end dates.
* **Set your** [**eligibility**](https://launchpad.support.sap.com/#/notes/2084628) **rules**for all new templates. **Admin Tools> Compensation Administration> Manage Compensation Plan Template**> Click name of prior cycle's plan template> Click on **Eligibility Rules** tab
* **For Variable Pay clients we recommend that your test instance be refreshed as an exact clone** of production so that your tests will be real world tests of actual data. Unlike most processes that do not require such a step, Variable Pay is very complex and issues may only become apparent when tested against exact data you will be launching with.
* **Email Notifications:**
* Test Forgot Password and Send System Message separately from routing emails.
* **Turn ON email notifications that** are needed before creating forms. Turn OFF email notifications that are not required.
* Have you updated your **Email Notification Templates** to have the most current contact information in the body of the emails?
* Test emails and routing notifications for all users and steps in the process to confirm the correct people get the correct emails for the correct steps and actions, as well as making sure that people who you do not want to get emails do not get them.
* **Reports:** Update any automated reports to reference new templates.
* If you have any new YouCalc widgets update the widget ID in your template & reports.
* **Testing:** Please refer to the Testing Best Practices which is also part of this guide from the main menu.
* **Launching plan:** How do you plan to mass create these worksheets?  Are filters and data set up correctly to ensure that the correct group receives the correct template?

If you are changing how your program worked (as opposed to relaunching the same program) then please engage Professional Services early. Customer Success Support will be unable to provide consultation to reconfigure existing programs or build new programs.