Compensation Cycle Preparation Cheat Sheet

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

* Create an [overall project timeline](https://launchpad.support.sap.com/#/notes/2084062/E) 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
* 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)
* 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