



# ERP-2793 Report Request (Req 117) : Merit Eligibility

Please see the [SAP Analytics Approach](#) document, section 'Documentation' for more information about the context of this document.

Status	Approved
Functional Specification Owner	<a href="#">BILLING-ext, Anoop</a>
Stakeholders	Guillaume Decarsin/Ruben Beeck
Jira Request ID	 <a href="#">ERP-2566</a> - Jira project doesn't exist or you don't have permission to view it.
Jira Development (Build) ID	 <a href="#">ERP-2793</a> - Jira project doesn't exist or you don't have permission to view it.
Lean IX App Link	
Business Process Reference (L4)	11.11.01.02. Create & Distribute Custom Reports

## High-Level Specification

Parameter	Value
Application System (Delivery Tool)	SuccessFactors – Story Report Module: Compensation (COMP) and Employee Central (EC)

## Functional Overview

This report is required to **identify employees eligible for the Merit process** by consolidating **Employee Central (EC)** and **Compensation** data.

It addresses the need to:

- Apply **Compensation eligibility rules** consistently
- Identify employees **in scope** for the annual merit cycle
- Validate **eligibility exceptions**
- Support HR and Compensation teams during the merit exercise

The report ensures eligibility determination is **consistent, auditable, and transparent**, reducing manual validation across multiple data sources.

## Scope

### Functional Scope

- Custom **SuccessFactors Story Report**
- Consolidates **EC attributes** and **Compensation eligibility rules**
- Focuses on employeelevel **Merit eligibility and exceptions**

## Data Scope

Eligibility is derived using:

- Compensation eligibility rules
- EC attributes, including:
  - Hire date
  - Grade / Pay grade
  - New hire status
  - Last date worked
  - Employee class
  - Employment type
  - Merit eligibility exception
  - Event reasons (Promotion, Transfer, Offcycle salary change)

## Special Populations in Scope

- Contingent employees converting to permanent as of **01/01 of the year**
- Employees with **permanent international relocation** between **January 2027 and end of April 2027**

## Solution Overview

Content ownership: [BILLING-ext, Anoop](#)

Input from: Guillaume Decarsin, Ruben Beeck

The solution delivers a **custom Story Report** enabling users to:

- View consolidated Merit eligibility results
- Analyze eligibility distribution via charts
- Validate employeelevel eligibility and exceptions using detailed tables and filters

## Story Definition

### Overview Page

- Summary KPIs
- Eligibility distribution charts
- Employeelevel eligibility table

## Story Page 1 – Merit Eligibility Overview

### Page Objective

Provide a consolidated and visual overview of employee eligibility for the Merit process, including validation of exceptions and special scenarios.

### Page Filters

Report Field Name	Mandatory / Optional	Prompt Type	Default Value / Restrictions
Grade	Optional	Selection option	None
New Hire Status	Optional	Selection option	None
Last Date Worked	Optional	Interval	None
Employee Class	Optional	Selection option	None
Employment Type	Optional	Selection option	None
Merit Eligibility Exception	Optional	Selection option	None

### Page Level Input Controls

As defined by the page filters above.

### Calculations

- Count of number of employees
- Count of eligible vs noneligible employees

(All complex eligibility logic is derived from **Compensation eligibility rules**, not calculated in the story.)

## Layout

**Standard layout following provided mockup:**

- Syensqo logo in topleft corner
- Summary KPIs aligned horizontally
- Charts (pie and bar) below KPIs
- Detailed employee table
- Filters pinned at the top of the page

## Dashboards / Charts

### Chart 1 – Eligibility Status Distribution

- Type: Pie chart
- Fields:
  - Eligibility status
  - Number of employees
- Calculation: Count of employees

### Chart 2 – Eligible Employees by Org Dimensions

- Type: Bar chart
- Fields:
  - Number of eligible employees
  - Business Unit
  - Department
  - Legal Entity
  - Country
- Calculation: Count of employees

## Tables / Lists

### Employeelevel Eligibility Table

Key fields / columns include (nonexhaustive):

- Employee identifiers
- Hire date
- Grade / Pay grade
- New hire status
- Last date worked
- Employee class
- Employment type
- Merit eligibility flag
- Merit eligibility exception
- Event reasons:
  - Promotion
  - Transfer
  - Offcycle salary change dates

The table must include:

- All employees in scope
- Contingent Permanent conversions
- Permanent international relocations within the defined period

Expected rows: All active employees evaluated for Merit eligibility.

## Story Filters (Global)

Report Field Name	Mandatory / Optional	Prompt Type	Default Value / Restrictions
Employee Status	Mandatory	Selection option	Active employees only

## Data Models

Data Model Technical Name	Data Model Description	Jira Development ID	Link to Data Model FS
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To be confirmed	EC + Compensation eligibility dataset	ERP2793	To be added
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## Business Roles

- 40-Total Rewards Specialist
- 40-GBS Compensation Specialist/Comp Admin

## Design Rationale

The design reuses standard SuccessFactors Story capabilities while extending them with **Compensation eligibility logic** and **EC attributes**, ensuring:

- Reliable eligibility determination
- Clear auditability
- Efficient validation during the Merit cycle

## Assumptions

- Compensation eligibility rules are correctly configured and maintained
- EC data (employment events, statuses, attributes) is up to date
- Security access is managed via standard SuccessFactors RBP

## Dependencies

- Dependency on Compensation eligibility rule configuration
- Dependency on EC employment data accuracy
- Security role finalization for report access

## Special Requirements

- Inclusion of specific populations (Contingent Permanent, International Relocations)
- Eligibility logic must remain consistent with Compensation configuration
- No countryspecific regulatory logic defined beyond what is included in Compensation rules

## Frequency of Analysis / Report Run

- Adhoc / Ondemand

## Testing Considerations / Dependencies

### How to Test

- Verify eligible vs noneligible employees align with Compensation eligibility rules
- Validate inclusion of special populations
- Confirm filters behave as expected
- Validate charts and table counts match filtered populations

## Test Conditions & Expected Results

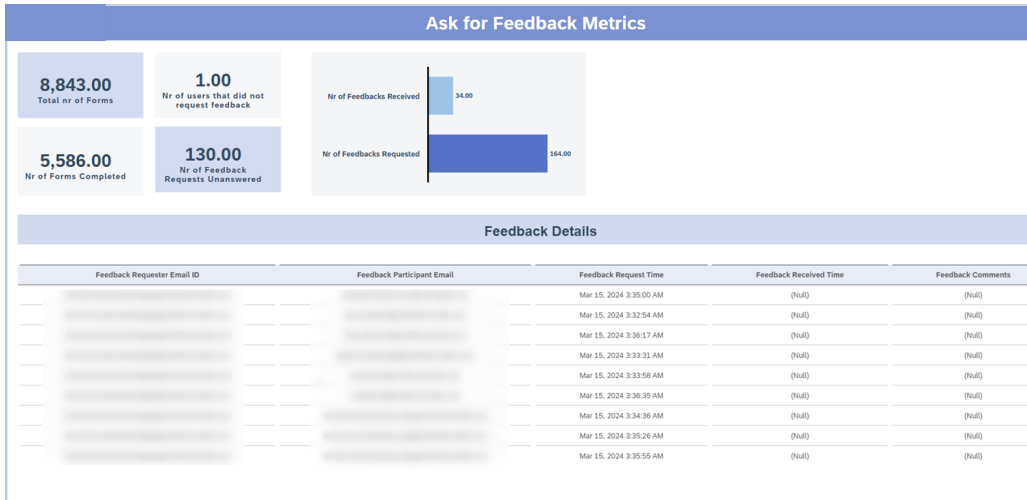
ID	Condition	Expected Result
1	Employee eligible per Compensation rules	Shown as eligible in report
2	Employee with eligibility exception	Exception clearly visible
3	Contingent Permanent conversion	Included correctly
4	International relocation in scope	Included correctly

## Other Requirements

None identified.

## Screenshots

This report will follow the following format:



## See also

**File**   **Modified**

No files shared here yet.

## Change log

Version	Published	Changed By	Comment
<b>CURRENT</b> (v. 1)	Apr 13, 2026 13:42	SKIKDAOUI-ext, Myriam	