

ERP-2794 Report Request (Req 120) : SIP Eligibility Report

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

Status	Approved
Functional Specification Owner	BILLING-ext, Anoop
Stakeholders	Guillaume Decarsin, Ruben Beeck
Jira Request ID	 ERP-2568 - Jira project doesn't exist or you don't have permission to view it.
Jira Development (Build) ID	 ERP-2794 - 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)

Functional Overview

- **Report Type:** SuccessFactors Story Report
- **Module:** Compensation
- **Population:** Active employees in scope for SIP (global)
- **Usage:** Precycle eligibility validation, adhoc / ondemand
- **Focus:** SIP eligibility determination and exception identification
- **Primary Users:** Enterprise compensation processors, Total Rewards and Compensation roles

Why the report / analytics is needed

The SIP Eligibility Report is required to support the **Sales Incentive Plan (SIP) process** by providing a **precycle eligibility control view** for enterprise compensation processors.

It allows the business to assess employee eligibility **before** launching the SIP compensation cycle, ensuring that only eligible employees are included and that exceptions are identified and addressed in advance.

Business requirements addressed

This report addresses the following business requirements:

- Identify employees **in scope for the SIP process** based on defined eligibility criteria
- Provide **visibility of eligibility exceptions** that need to be marked or corrected

- Enable **precycle validation** of eligibility to avoid downstream corrections during SIP execution
- Support enterprise compensation processors with a **single, consolidated eligibility view**

Business questions answered

The report enables the business to answer key questions such as:

- Which employees are **eligible for SIP** for the upcoming cycle?
- Are there any **eligibility exceptions** that require action before the cycle starts?
- How is SIP eligibility distributed across **grades, workforce categories, and global assignment statuses**?
- Are all **active employees** correctly evaluated against SIP eligibility criteria?

Why it is important to the business

This report is critical to ensure **accurate, compliant, and timely SIP processing**.

Without a dedicated precycle eligibility report, eligibility checks would rely on manual analysis across multiple data sources, increasing the risk of errors, inconsistencies, and delays.

The SIP Eligibility Report reduces operational risk, improves data quality, and supports a smoother execution of the SIP compensation cycle.

Scope

Functional Scope

- Custom **SuccessFactors Story Report**
- Focused on **SIP eligibility and exception validation**
- Used **before** the SIP compensation cycle

Data Scope

Eligibility information is based on employee data including:

- Grade
- Hire Date
- Bonus Eligibility Exception
- Last Date Worked
- Workforce Category
- Employee status on Global Assignment

Population Scope

- Employees in scope for SIP
- **Active employees only**
- Global population

Solution Overview

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

Input from: Guillaume Decarsin, Ruebn Beeck

The solution delivers a **custom Story Report** named “**SIP Eligibility Report**” within the **Compensation** module, enabling:

- Eligibility overview
- Exception identification
- Precycle validation for SIP processing

Story Definition

Overview Page

- Summary KPIs
- Eligibility distribution charts
- Detailed employee eligibility table

Story Page 1 – SIP Eligibility Overview

Page Objective

Provide a clear and consolidated overview of SIPeligible employees and identify eligibility exceptions prior to the SIP compensation cycle.

Page Filters

Report Field Name	Mandatory / Optional	Prompt Type	Default Value / Restrictions
Grade	Optional	Selection option	None
Hire Date	Optional	Interval	None
Workforce Category	Optional	Selection option	None
Global Assignment Status	Optional	Selection option	None

Page Level Input Controls

As defined by the page filters above.

Calculations

- Number of employees eligible for SIP
(All eligibility logic is derived from employee and Compensation data; no additional custom calculations defined.)

Layout

Story Report layout focused on:

- Eligibility overview
- Exception identification
- Precycle validation use

Layout elements:

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

Dashboards / Charts

Chart 1 – SIP Eligibility Overview

- Type: Pie chart
- Fields:
 - Number of employees eligible
 - Grade
 - Workforce category
- Calculation: Number of employees eligible

Chart 2 – Global Assignment Status & Eligibility

- Type: Bar chart
- Fields:
 - Number of employees eligible
 - Employee status on Global Assignment
- Calculation: Number of employees eligible

Tables / Lists

Employeelevel Eligibility Table

Key fields / columns include (nonexhaustive):

- User ID
- First Name
- Last Name
- Grade
- Hire Date
- Bonus Eligibility Exception
- Last Date Worked
- Workforce Category
- Global Assignment Status

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
To be confirmed	SIP eligibility dataset (Compensation)	ERP2794	To be added

Business Roles

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

Design Rationale

A custom Story Report is required because:

- No existing report supports SIP eligibility checks **prior** to the compensation cycle
- Standard SAP / SuccessFactors reports do not provide consolidated eligibility and exception visibility
- The SIP process requires a dedicated precycle validation view

Assumptions

- Employee data and Compensation data are correctly maintained
- Eligibility exceptions are marked in source data
- Security access is managed via standard SuccessFactors RBP

Dependencies

- Accuracy of Compensation and employee master data
- Finalization of security roles for report access
- Dependency on SIP process timelines

Special Requirements

- Global scope
- Precycle usage only
- Eligibility and exception visibility is mandatory for SIP validation

Frequency of Analysis / Report Run

- Adhoc / Ondemand

Testing Considerations / Dependencies

How to Test

- Validate inclusion of active employees only
- Validate eligibility counts in charts vs table
- Validate page filters (Grade, Hire Date, Workforce Category, Global Assignment Status)
- Validate visibility of eligibility exceptions

Test Conditions and Expected Results

ID	Condition	Expected Result
1	Employee eligible for SIP	Displayed as eligible

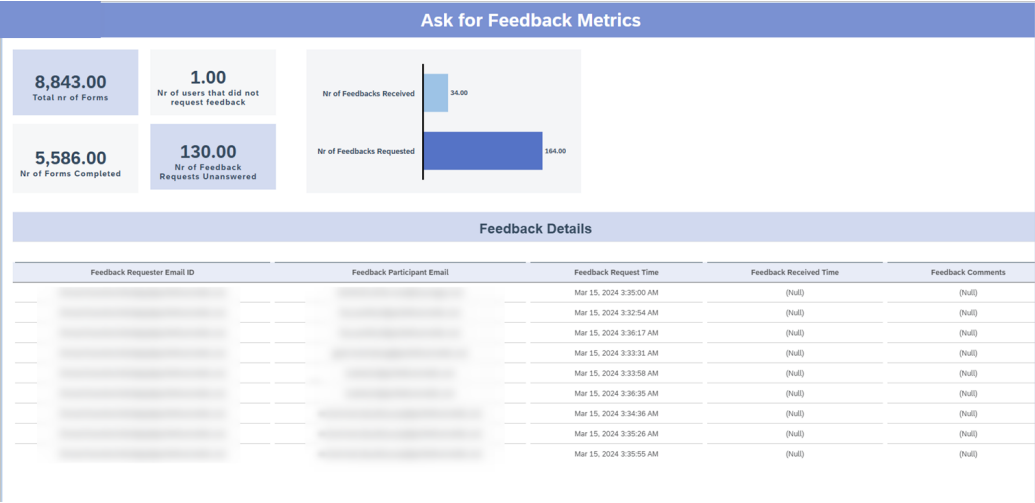
2	Employee with eligibility exception	Exception visible
3	Inactive employee	Not included
4	Global assignment status applied	Correctly reflected in chart/table

Other Requirements

None identified.

Screenshots

Report will follow the below format:



See also

File	Modified
No files shared here yet.	

Change log

Version	Published	Changed By	Comment
CURRENT (v. 3)	Apr 15, 2026 08:45	SKIKDAOUI-ext, Myriam	
v. 2	Apr 15, 2026 08:42	SKIKDAOUI-ext, Myriam	
v. 1	Apr 15, 2026 08:11	SKIKDAOUI-ext, Myriam	

Workflow history

This view shows the 5 most recent entries. The complete workflow log is available from the 'Document Activity' menu item.

Apr 23, 2026	Actor	Type	Activity	Version
Approved	 GARNIER-ext, Marion	State	changed state to Approved at 1:39 pm	v3
Lead Approval	 GARNIER-ext, Marion	State	gave <i>POD Lead Review</i> approval at 1:39 pm	

SKIKDAOUI-ext, Myriam		State	assigned approval <i>POD Lead Review</i> to GARNIER-ext, Marion at 12:43 pm		
Apr 22, 2026					
BILLING-ext, Anoop		State	changed expiry date to '29 Apr, 2026 11:58 am' at 11:58 am		
		State	changed state to Lead Approval at 11:58 am	v3	
Tech Review	BILLING-ext, Anoop		State	changed expiry date to '27 Apr, 2026 11:58 am' at 11:58 am	
			State	gave <i>Tech Review</i> approval at 11:58 am	
			State	changed state to Tech Review at 11:58 am	v3