

ERP-2711 Report Request (Req 81) : Merit forms status

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

Status	Approved
Functional Specification Owner	Anoop Billing
Stakeholders	Guillaume Decarsin, Ruben Beeck
Jira Request ID	 ERP-1226 - Jira project doesn't exist or you don't have permission to view it.
Jira Development (Build) ID	 ERP-2711 - 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

Functional Overview

Why the report is needed

This report is required to **monitor the progress of merit forms** and identify **which routemap step each form is currently in**, in order to assess merit allocation, budget spend, and adherence to payforperformance principles.

Business requirements addressed

- Monitor merit form progress by routemap status
- Support analysis of merit allocation and budget usage
- Enable drilldown from summary views to individual employee and manager details

Business questions answered

- How many merit forms are in each routemap step?
- Which managers' forms are pending or completed?
- How is merit allocation progressing across the organization?

Business value

The report enables Total Rewards and SBPs to track compensation cycle progress, ensure governance of merit processes, and support timely decisionmaking on budget and reward adjustments.

Scope

In Scope

- Merit forms for the **current year**
- Routemap status tracking
- Employeelevel and managerlevel visibility
- Compensationrelated indicators linked to merit forms

Out of Scope

- Historical merit cycles outside the current year

Solution Overview

Content ownership: Anoop Billing
Input from: Guillaume Decarsin, Ruben Beeck

- Security: Standard SuccessFactors RoleBased Permissions (RBP) apply. Visibility depends on user role and authorized scope (Global vs Entity).

Story Page 1 – Merit Forms Status

Page Objective

Provide a consolidated view of **merit form status by routemap step**, with interactive charts and the ability to drill down to individual employee and manager details.

Page Filters

Report Field Name	Mandatory / Optional	Prompt Type	Default / Restrictions
Form ID	Optional	Multiselect	All
Business Unit	Optional	Multiselect	All
Country	Optional	Multiselect	All
Form Start Date	Optional	Date	All
Form End Date	Optional	Date	All
Form Status	Optional	Multiselect	All
Manager	Optional	Multiselect	All
Performance Rating	Optional	Multiselect	All

Page Level Input Controls

- Interactive filtering driven by chart selections (clicking on a chart segment filters all other charts and tables).

Calculations

The report includes the following calculated metrics:

- Total number of forms
- Total number of completed forms
- Total number of employees
- Count of forms by routemap status

Layout

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

- Detailed table

Dashboards / Charts

Summary KPIs (Numerical):

- Total number of forms
- Total number of completed forms
- Total number of employees

Charts:

- Merit Form Status by Routemap Step – Pie Chart
- Number of Forms by Business Unit / Department / Legal Entity / Country – Bar Chart

All charts and KPIs are interactive and linked to the detailed table.

Tables / Lists

Table 1 – Merit Form Details (Employee Level)

Field
Form ID
Form Name
Form Status
Employee First and Last Name
Employee Username
Employee Email Address
Employee Business Unit
Employee Legal Entity
Employee Department
Manager First and Last Name
Manager Username
Manager Email Address
Person Currently Holding the Form
Form Start Date
Form End Date
Country
Zone (EMEA / APAC / Americas – if available)
Location (Site)
Position Title
Job Family
Hiring Date
CompaRatio Before Compensation Campaign
CompaRatio After Compensation Campaign
Salary Before Compensation Campaign
Salary After Compensation Campaign
Merit Spend
Lump Sum Amount

Story Filters (Global)

Report Field Name	Mandatory / Optional	Default
Employee Status	Mandatory	Active employees only

Data Models

Data Model	Description	Jira Development ID
Compensation Merit Forms Data Model	Merit form and routemap status data from Compensation module	ERP2711

Business Roles

Role
40-Total Rewards Specialist
20-Strategic Business Partner(CS-HR SBP/SBA)
50-IT HR Specialist (HRIT)/System Admin/IT Admin
40-GBS Compensation Specialist/Comp Admin

Design Rationale

No standard report or catalog solution meets the business requirement to track merit form progress by routemap step with drilldown capability. A custom SuccessFactors Story Report is required.

Assumptions

- Only **active employees** are included
- Merit forms relate to the **current compensation cycle**
- Routemap status is consistently maintained

Dependencies

- Availability and quality of Compensation module data
- Final confirmation of RBP roles and scopes

Special Requirements

- Charts and tables must be fully **interactive** (clicktofilter behavior).
- Drilldown from chart segments to employeelevel details is required.

Frequency of Analysis / Report Run

Frequency
Daily
Adhoc / Ondemand

Testing Considerations / Dependencies

- Validate routemap status distribution
- Validate drilldown behavior from charts to table
- Validate compensation values before and after campaign
- Validate rolebased access by user type

Test Conditions and Expected Results

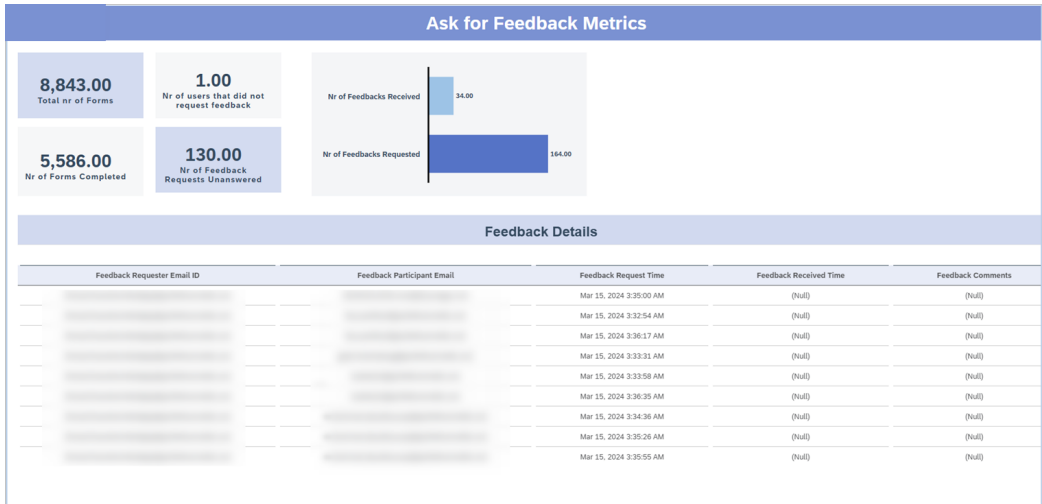
ID	Condition	Expected Result
TC01	Open report without filters	All active merit forms displayed
TC02	Click on a routemap status in pie chart	All charts and table filtered to selected status
TC03	Filter by Business Unit	KPIs, charts, and table update correctly
TC04	Review compensation values	Before/after values displayed correctly

Other Requirements

None identified.

Screenshots

Similar to this:



See also

File	Modified
No files shared here yet.	

Change log

Version	Published	Changed By	Comment
CURRENT (v. 3)	Apr 22, 2026 12:15	SKIKDAOUI-ext, Myriam	report description updated
v. 2	Apr 07, 2026 10:56	SKIKDAOUI-ext, Myriam	
v. 1	Apr 07, 2026 10:34	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.

May 07, 2026	Actor	Type	Activity	Version
Approved	 GARNIER-ext, Marion	State	changed state to Approved at 11:35 am	v3
Lead Approval	 GARNIER-ext, Marion	State	gave <i>POD Lead Review</i> approval at 11:35 am	
Apr 30, 2026				
	 SKIKDAOUI-ext, Myriam	State	assigned approval <i>POD Lead Review</i> to  GARNIER-ext, Marion at 8:19 am Hi Marion, this FS is ready for your review. Thanks.	
Apr 23, 2026				
	 BILLING-ext, Anoop	State	changed expiry date to '30 Apr, 2026 03:25 pm' at 3:25 pm	
		State	changed state to Lead Approval at 3:25 pm	v3
Tech Review	 BILLING-ext, Anoop	State	changed expiry date to '28 Apr, 2026 03:25 pm' at 3:25 pm	
		State	gave <i>Tech Review</i> approval at 3:25 pm	
		State	changed state to Tech Review at 3:25 pm	v3