



1H 2026 Release Briefing Series

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SAP SuccessFactors

Compensation & Variable Pay

1H 2026 Release Briefing





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Agenda

- Most Important Topics
- Other Release Features
- Deep Dive Topic
- Product Road Map

Most Important Topics



Additional Support for Custom Formula (1/2)

We've enhanced the **Basis Calculation Equation** functionality to support additional customization when setting up **Basis Calculation Equations** for Variable Pay templates.

You can now define conditional rules directly in the **Formula** field for **Basis Calculation Equation** in Variable Pay templates using the If-then conditions in your formula. This allows you to set different calculation logic for target bonus amounts based on string or number fields.

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

- IF conditions using fields of type vfld, ffld, or ifld from the custom field list defined in the Succession Data Model as a background element of type vfld, ffld, or ifld.
- Date fields are not supported.
- Nested IF statements are supported.
- Logical operators such as AND or OR are not supported.
- Lookup function is not supported.
- Fields basis, recordType, and varPayProgramName are not supported for bonus calculations.
- The UI provides validation and clear error messages for unsupported formula inputs.

This enhancement is from [Custom Influence Idea 343168](#).

Configuration Requirements:

- Go to **Compensation Home > Template Name > Settings > Set Bonus Calculation**
- In the **Basis Calculation Equation** section, choose **Custom Formula**



Additional Support for Custom Formula (2/2)

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

How It Looked Before

Basis Calculation Equation

Configure basis amount as: ?

Formula:

Custom Formula

PLEASE NOTE: You can only use numeric fields (field type = ifld/ffld). The basis field (field type = ffld1) cannot be used to define the formula.

Use a field: annualRate [Annual Rate] Insert

Trigger Basis Calculation

Was not possible to use IF-then logic or functions in Custom Formulas.

How It Looks Now

Basis Calculation Equation

Configure basis amount as: ?

Formula:

Custom Formula

You can use fields of type vfld and numeric fields of type ifld or ffld for custom formulas. You can define IF conditions when setting up custom formulas. We don't support dfld fields. Also, lookup function, basis, recordType, and varPayProgramName can't be used for bonus calculations.

if(country="USA" ((salary*gPct)/100), if(country="FRA", (salary/3), if country="BRA", (salary/1.5), if country="CHN" (salary/2), if country="AUS" (salary/10). (salary/4)))

Use a field: salary [Salary] Insert Trigger Basis Calculation

Is possible to use If-then statements and use functions in **Custom Formula** for **Basis Calculation Equation** allowing dynamic calculations based on employee attributes such as Legal Entity. There's also validation and error handling in the formula editor to support custom formula creation.

The level of impact is High



Budget Rule Validation in Executive Review (1/2)

Configured budget rules are now validated for Executive Reviews, ensuring that any budget excess triggers a warning or error message upon saving

Previously any budget rules were only validated on the compensation worksheets. When saving an Executive Review, the system checks if the budget exceeds the set limits and provides a warning or error message as configured. This validation ensures that compensation planners are alerted to any budget discrepancies during the review process. The validation applies to the filtered employees on the Executive Review.

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

This enhancement is from [Customer Influence Idea 275419](#).

Configuration Requirements:

- Go to **Compensation Home > Plan Setup > Settings > Advanced Settings**. Check the **Enable Budget Rule Validation in Executive Review** checkbox to enable budget rule validation on executive review.
- After budgets are configured, go to **Plan Setup > Plan Details > Budget** and **Add Budget Rules**, to set up the rules based on business requirements.

The screenshot shows the 'Add Budget Rule' configuration form. It includes the following fields and options:

- Use For:** salary (dropdown)
- Allow Exceed:** allow (selected), warn, disallow
- Allow Save On Exceed:** warn, disallow, No (radio button selected)
- Language Add:** Default (dropdown)
- Budget Exceed Warn Message:** Allocation total exceeds budget, do you want to save?
- Buttons:** Save, Cancel

The level of impact is Medium

Budget Rule Validation in Executive Review (2/2)

How It Looked Before

Budget rule validation was only available for worksheets. No warnings or errors were shown on the executive review even if the budget rules weren't respected.

Type: Changed

Lifecycle: General Availability

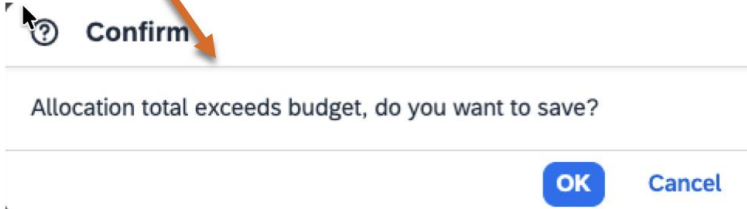
Enablement: Customer configured

How It Looks Now

Budgets ×

	Merit+LumpSum	Adjustment	
*Budget Total	\$33,108,561.92	\$6,621,712.47	2.00%
*Budget Spent	\$7,648,042,956.07	\$509.15	0.00%
*Budget To Allocate	-\$7,614,934,394.15	\$6,621,203.32	2.00%

*The budget is based on the 885 users according to the filter options.

 **Confirm**

Allocation total exceeds budget, do you want to save?

OK Cancel

Budget rules that are configured for a template are considered and the error or warning message is generated in the executive review upon **Save** of the data when the budget rules aren't respected.

The level of impact is Medium

Business Section Fields from Multiple Goal Plans in the Statement Editor (1/2)

You can now select certain standard fields from multiple business Goal Plan sections and add them to the Personal Rewards Statement when editing a compensation statement template in the statement editor.

You're able to add up to five business goal plans for a variable pay plan when setting up bonus calculations.

Set Bonus Calculation

Bonus Calculation Equation

Number of Business Goal Sections:

Bonus Calculation Equation

- base × business performance
 - base × business performance × individual performance
 - base × (business performance + individual performance)
 - base × business performance × team performance × individual performance
 - base × (business performance + team performance + individual performance)
- Note: business => business1 + business2 + business3 (in the formula)

Goal Plan Name:

Goal Plan ID	Goal Plan Name	Type	Action
8018	8018_Variable Pay Objective Plan	business1	×
	8002		

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

This functionality enables you to select business section fields from multiple goal plans in the column designer such that they appear in the compensation worksheet. However, all fields weren't available to you in the statement editor.

These fields included the following:

- Business Calc Amount
- Business Forecast Percent
- Business Forecast 2 Percent
- Forecast Calc Amount
- Forecast 2 Calc Amount
- Total Target
- Business Percent



Business Section Fields from Multiple Goal Plans in the Statement Editor (2/2)

For example, you can add along with totalTarget, totalTarget1 to totalTarget5. Once the fields are selected in the column designer, these goal section fields are now available in the statement editor. You can add these fields under the **Add Field** option in the statement editor and define conditions based on them.

This allows you to add business section entry level fields to Rewards Statement templates from multiple goal plans. You're thus able to use the statement editor to create and maintain your templates and don't need any expertise in XML or XSL for this purpose.

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

How It Looked Before

Couldn't select certain business section related fields in the statement editor from multiple goal plans. The work-around was to create custom statement templates, unabling to use the statement editor for statement template creation.

How It Looks Now

Add Field

Source:*
Plan

Select a plan: *
2019 Short Term Incentive Plan SB

Select a field: *
None

- Business Calc Amount1
- Business Calc Amount3
- Business Calc Amount2
- Business Calc Amount4
- Business Calc Amount5
- Business Forecast 2 Percent
- Business Forecast 2 Percent1
- Business Forecast 2 Percent2
- Business Forecast 2 Percent3
- Business Forecast 2 Percent4
- Business Forecast 2 Percent5

Add

Can select business section-related fields from multiple goal plans in the statement editor, allowing for easy customization of statement templates.

The level of impact is Medium



Milestone Awards Based on Service Date (1/2)

You can now use **Service Date** from Employee Central as a milestone award criteria when setting up milestone award programs.

When setting up milestone award programs, select **Service Date** as an option for **Milestone Start Date** field. You can also run reports to audit and monitor past and future milestone awards based on programs set up for service date as you could with other criteria in the previous version. Scheduled jobs evaluate service date anniversaries and trigger awards, ensuring timely recognition.

This enhancement is from [Customer Influence Idea 326892](#).

Configuration Requirements:

- Ensure that the Employee Central integration is set up to read the **Service Date** field, including field identifier mapping and permissions.

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

The level of impact is Medium



Milestone Awards Based on Service Date (2/2)

How It Looked Before

The screenshot shows a configuration form for a milestone award. The fields are: Name (text), Description (text), Program Type (dropdown), Milestone Type (dropdown), Point Type (dropdown), Milestone Start Date (dropdown), Pay Component (dropdown), and Employee Email Group (dropdown). The Pay Component dropdown is open, showing options: Hire Date (highlighted), Original Hire Date, Seniority Date, and Benefits Eligibility Start Date. A 'Save and Proceed' button is at the bottom.

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

You didn't have **Service date** from Employee Central as a date source for milestone awards, limiting the ability to align awards with tenure-based recognition policies.

How It Looks Now

The screenshot shows the same configuration form as before, but with an additional option, 'Service Date', highlighted in the Pay Component dropdown menu. The 'Service Date' option is enclosed in a red box.

You may select **Service Date** as a date source when setting up milestone award programs to award employees on their service date anniversary.



The level of impact is Medium

Permission Changes for Reward Statements on Latest People Profile (1/3)

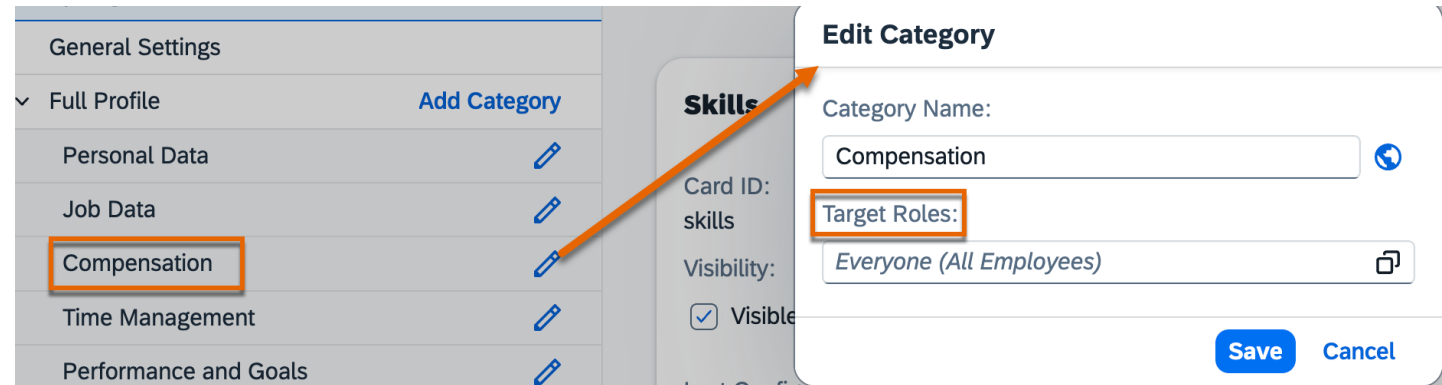
The Full Profile data viewing experience is now available to all customers. The Full Profile handles permission to view **Compensation** category cards differently than the legacy People Profile does.

The visibility of the category Compensation as well as the various Reward Statements related cards is set to be visible to all by default. You can edit the visibility at the category level by going to **Configure Latest People Profile > Compensation**.

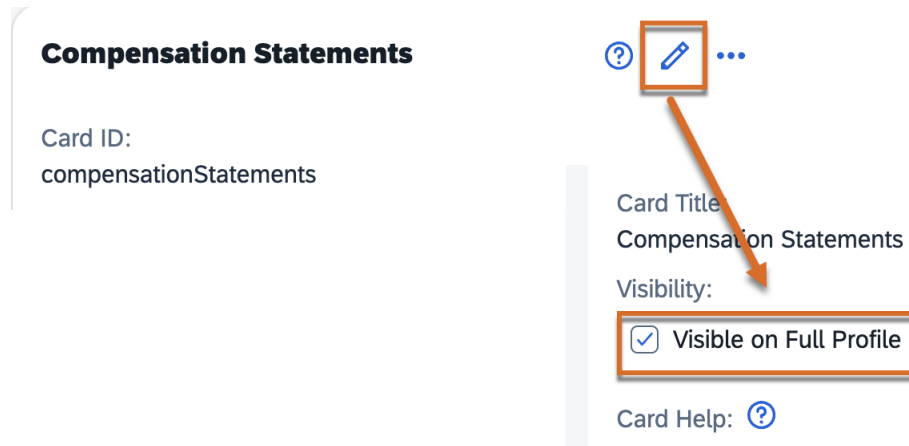
Type: Changed

Lifecycle: General Availability

Enablement: Automatically on



To change this visibility at the card level, go to **Configure Latest People Profile > Compensation**, select to edit the desired card and uncheck the checkbox for **Visible on Full Profile** as shown in the image.



The level of impact is Medium

Permission Changes for Reward Statements on Latest People Profile (2/3)

If you want the cards to be visible to employees, you can control the visibility of the cards for other roles by using Role-based permissions. The role-based permission for each statement-related element in **User Permission > Employee Data** must not have the Target population set to all.

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

The permissions under **User Permission > Employee Views** no longer apply to the cards on the Full Profile. If you rely on this permission to secure the Rewards Statement data, you must review all your permissions related to the Reward Statements and make sure these are as desired.

Also, if you have permissions based on hierarchy in the Succession Data Model, review the permissions set for fields for Rewards Statements. The permission to all by using * for these fields is no longer valid configuration. Replace * with the roles in the hierarchy that need the requisite permissions.

Note:

- If you have the **Compensation Home > Actions for all plans > Company Settings > Manage Company Settings > View generated Variable Pay Statements, Variable Pay Individual View and Combined Statements based on Role-Based Permission** setting disabled, you must review the permissions for **personalVarPayStatement**, **vpIndividualView**, and **personalCombinedStatement** fields in the **Manage Business configuration** tool.

This simplifies the permission structure for Full Profile however at this time makes it imperative to review permissions and make sure they're in line with your business policies.



The level of impact is Medium

Permission Changes for Reward Statements on Latest People Profile (3/3)

Configuration Requirements:

Review the following and align the permissions with your business requirements:

- **Configure Latest People Profile > Compensation** category viewing permissions.
- Viewing permissions for each of the cards under the **Compensation** category when reviewing **Configure Latest People Profile** settings.
- **User Permission > Employee Data** permissions for the data relevant to Rewards Statements.
- Go to **Manage Business Configuration > Employee Profile > Standard**. Review roles set to view the **personalVarPayStatement**, **vpIndividualView**, and **personalCombinedStatement** fields. If * is one of the roles, remove it and have the roles in place you wish to be able to see these fields.

Note:

- You can add permission to view Reward Statements based on a Compensation plan template and Reward Statement template in **Compensation Home** by going to **<Template Name> > Complete Compensation Cycle > Rewards Statements > Manage Statement Templates**

How It Looked Before

The permission model for Employee Profile respected the permissions set for **Employee Views** which are ignored by the permission model for the latest People Profile.

How It Looks Now

The **Compensation** category and all Reward Statement cards are visible to all by default. To make sure that the Rewards Statements aren't exposed unintentionally, review the **Employee Data** permissions for the fields related to Personal Reward Statements.

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on



Other Release Features



Advanced Worksheet Filters Now Enabled by Default

The advanced worksheet filters are now enabled by default. In case you want to use the legacy filter capabilities, you must disable the advanced filters.

To disable advanced worksheet filters, go to **Compensation Home > Actions for all Plans > Company Settings > Manage Company Settings** and clear the checkbox for **Enable advanced filters on worksheets**.

This enhancement enables the better filtering experience on the worksheets by default. You as an administrator also have the flexibility to go back to the legacy functionality if you so desire.

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

How It Looked Before

You had to enable the check box for **Enable advanced filters on worksheets** if you wanted the advanced filters on your worksheets.

How It Looks Now

- Use Role-Based Permissions (RBP) to Configure Filters on the Latest
- Enable Employee-Level Target Population for Admin Bulk Print Sta
- Enable recall of statements when completed worksheets are rout
- Enable advanced filters on worksheets.

The checkbox for worksheet filter which you can access by going to **Compensation Home > Actions for all Plans > Company Settings > Manage Company Settings** is enabled by default.

The level of impact is Low

Changed Cursor for Help Text Icon on Compensation Worksheets

When users hover over the question mark icon for help text that is available by the fields on a compensation worksheet, the cursor is now a hand cursor.

This change applies to all compensation template types. The hand cursor provides a clear visual indicator that the icon is interactive and displays additional information when selected.

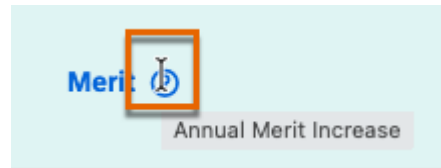
Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

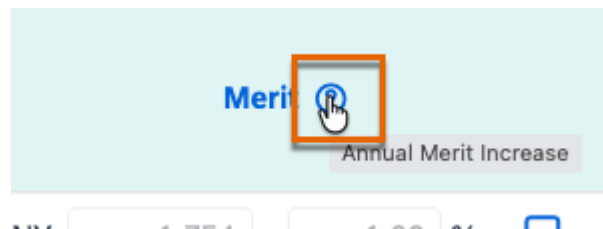
This enhancement is from [Customer Influence Idea 357111](#).

How It Looked Before



When users hovered over the question mark icon for help text on compensation forms, the cursor displayed as a text cursor. This created confusion because the text cursor typically indicates that users can enter text, which wasn't the intended functionality for the help text icon.

How It Looks Now



When users hover over the question mark icon for help text on compensation forms, the cursor displays as a hand icon, clearly indicating that the icon is interactive and clickable.

The level of impact is Low

Consistent Colors and Messages for Errors and Warnings (1/2)

We've ensured consistent colors and style for validations on Executive Review, worksheet, and Compensation Profile for Compensation, Variable Pay, and Total Compensation plans. Also, we have standardized message handling to ensure consistent messages across the application.

The level of impact is Low

This update applies to standard validation messages and warnings as well as any custom validations. Color changes for violating fields have also been made consistent across all aspects of the Compensation planning experience. The various messages upon change of fields or upon saving of the values on the UI are now consistent. Some representative changes are:

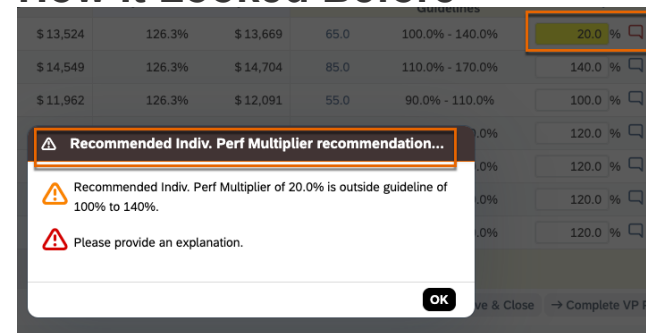
- Error or warning messages are now consistent when validating various fields across worksheet, Executive Review, and Compensation Profile for a Compensation plan. They're also consistent for all types of worksheets.

Type: Changed

Lifecycle: General Availability

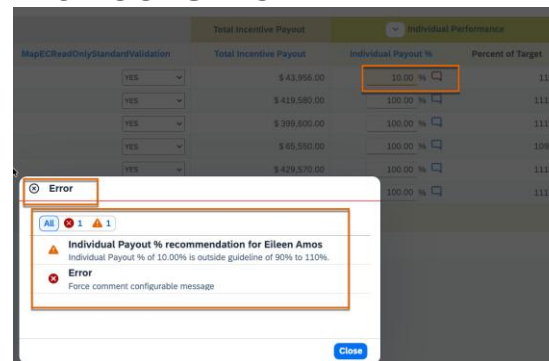
Enablement: Automatically on

How It Looked Before



Example of an error message on a Variable Pay worksheet in the previous version. Also in the background is the bright yellow color of the field which has generated the warning.

How It Looks Now



Example of an error on a Variable Pay worksheet in the current version. Also highlighted in the background is the soft yellow color of the field which has generated the warning. This color scheme is now consistent across the Compensation module.



Consistent Colors and Messages for Errors and Warnings (2/2)

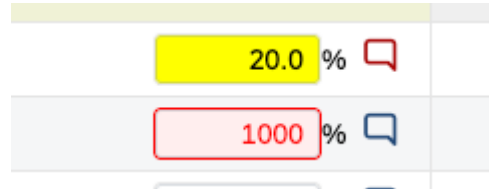
- Colors for warnings and errors are now consistent.

Type: Changed

Lifecycle: General Availability

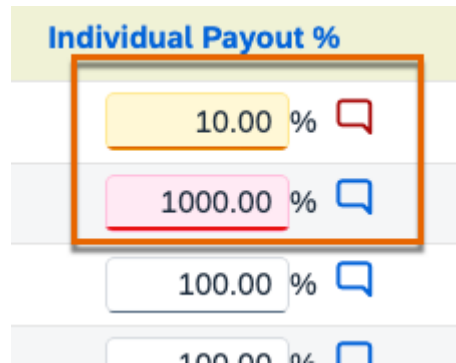
Enablement: Automatically on

How It Looked Before



Example of the fields causing soft and hard violations in the previous version.

How It Looks Now



Example of colors for both soft (warning) and hard (error) violations which are now a lighter shade of yellow and pink respectively with the boundary of the field colored differently.

The level of impact is Low

Email Notifications for Direct Managers on Statement Generation (1/2)

You can now set up email notifications for managers when Personal Reward statements are generated for their direct reports.

Go to **Complete Compensation Cycle > Manage Notifications** in **Compensation Home** for a template. You can set up email notifications for the direct managers based on **Personal Statement Template** or **Employee Name**, or a list of comma separated **Usernames**.

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

After configuration, when you select **Send Notifications**, the email notifications are generated based on a job which can be monitored from the **Monitor Compensation Jobs** screen. Also, administrators receive email with details of the notifications generated and information about the employees for whom the statements couldn't be generated. Manager names are included when needed.

This enhancement is from [Customer Influence Idea 304617](#).

Configuration Requirements:

- You must have the email template configured.
- You must set up Reward Statement templates and associate them with the compensation plan template you're setting notifications for.
- Enable the **View generated Variable Pay and Combined Statements based on Role-Based Permission** setting from **Company Settings** in **Compensation Home**.
 - **Note:** If you manage visibility of the Reward Statements using the Succession Data Model (SDM) based permissions, the email notifications for managers or employees can't be generated using this functionality
- You must have desired permissions set up under **Actions > Manage Permissions** in the page you see when you go to **Compensation Home > Complete Compensation Cycle > Rewards Statements > Manage Statement Templates**

Role-Based Permission Requirements:

- You must have the **Administrator Permissions > Manage Compensation and Varpay > Send Personal Statement and Bonus Plan Notifications** permission to configure notifications for managers and employees.



The level of impact is Low

Email Notifications for Direct Managers on Statement Generation (2/2)

How It Looked Before

Only employees could be notified when their statements were generated, leaving managers unaware of the availability of their direct reports' statements.

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

Plan Setup Manage Worksheets

Publish Data ▾ Rewards Statements ▾ **Manage Notifications ▾** Goal Statements ▾

Personal Statement Notifications

If you want to trigger personal statements through email notifications, you must have an email template configured from the "Email Notification Template Settings" page.

Statement notifications through email Statement notifications through home page

Select by personal statement template

All ▾

Select by employee name
 Select by list of usernames

Send Notification

How It Looks Now

Plan Setup Manage Worksheets

Publish Data ▾ Rewards Statements ▾ **Manage Notifications ▾** Goal Statements ▾

Personal Statement Notifications

If you want to trigger personal statements through email notifications, you must have an email template configured from the "Email Notification Template Settings" page.

Recipient
Manager ▾

Mode
 Email Homepage Card (for Employee Only)

Select By
 Personal Statement Template
 Employee Name
 Usernames

Enter comma-separated list of usernames
 Validate and Add

Send Notification


You can configure and send email notifications to direct managers when statements for their direct reports are generated, giving details on which employee's statement is available.

The level of impact is Low



Form Template Upload Now in Compensation Home

You can now upload form template XML for existing compensation, variable pay, and total compensation templates in the system.

In **Compensation Home**, a new  *Update Template* icon is available to facilitate the uploading of form template XML for existing templates. By selecting this icon, a dialog box opens, allowing administrators to choose an XML file and update templates stored in the system. Previously updating a template by uploading XML file was only possible in Provisioning which you as an admin did not have access to.

Type: New

Lifecycle: General Availability

Enablement: Automatically on

This enhancement allows you to make certain XML changes on your own and manage templates more efficiently since you do not need to reach out to someone with Provisioning access to take care of such changes.

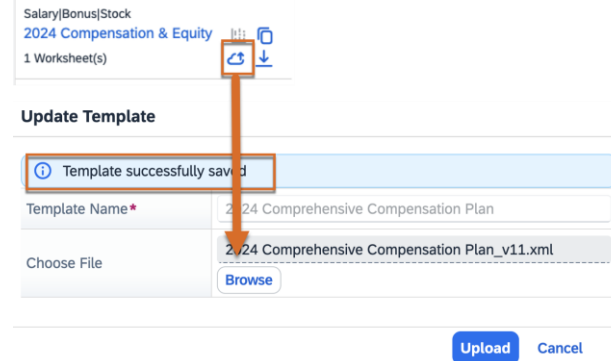
Role-Based Permission Requirements:

- You have the **Administrator Permissions > Manage Compensation and Varpay > Upload and Update Compensation Planning XML Templates** permission


How It Looked Before

Administrators did not have the option to upload form templates.

How It Looks Now



Salary|Bonus|Stock
2024 Compensation & Equity 1 Worksheet(s)
Update Template
Template Name* 2024 Comprehensive Compensation Plan
Choose File 2024 Comprehensive Compensation Plan_v11.xml
Browse
Upload Cancel

Administrators can upload form templates by selecting the  *Update Template* icon in **Compensation Home**, which opens a dialog box for template selection

The level of impact is Low



Legacy Executive Review Filters Removed from Administrator Tools (1/3)

Legacy Executive Review Filters were deleted from the application and the Advanced Executive Review Filters have been on by default since 1H 2023. In this version, we've removed the permissions, the Administrator tabs, and the enablement settings for the legacy executive review filters and plan level filters.

The level of impact is Low

- We've removed the Role-based Permissions related to legacy executive review filters.

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

How It Looked Before

Manage Compensation and Varpay

★=Access period can be defined at the granting rule level. †=Target needs to be defined. #=

Select All

Manage Executive Review Filters

Manage Advanced Executive Review Filters

Manage Plan Level Executive Review Filters

Enable Sharing Executive Review Filters

You saw the permissions for executive review and plan level executive review filters

How It Looks Now

Manage Compensation and Varpay

★=Access period can be defined at the granting rule level. †=Target needs to be defined. #=Tar

Select All

Manage Advanced Executive Review Filters

Enable Sharing Executive Review Filters

You now don't see the permissions related to legacy executive review filters

Legacy Executive Review Filters Removed from Administrator Tools (2/3)

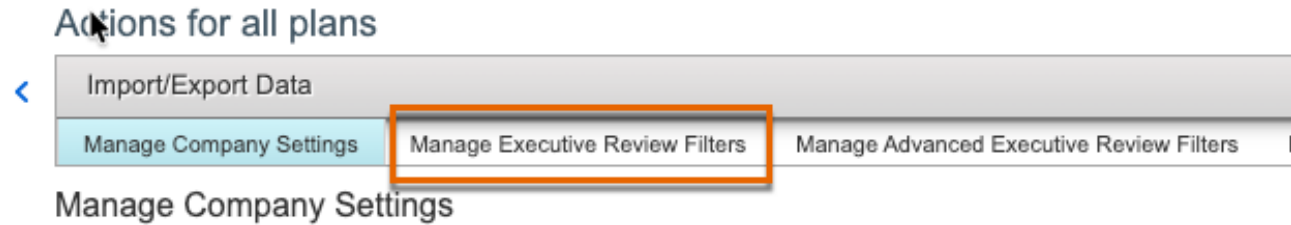
- We've removed the **Manage Executive Review Filters** tab from **Actions** for all plans in **Compensation Home**.

Type: Changed

Lifecycle: General Availability

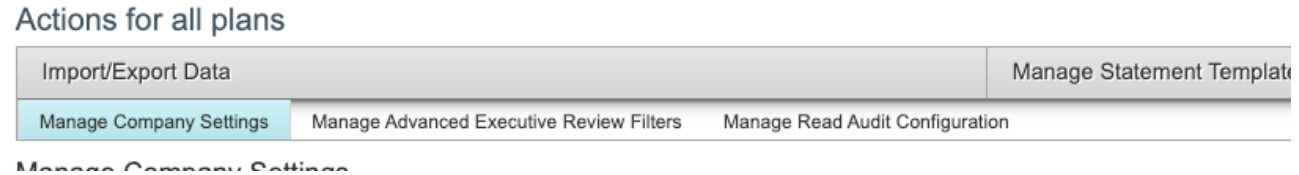
Enablement: Automatically on

How It Looked Before



You could access the **Manage Executive Review Filters** tab

How It Looks Now



You now don't see the tab for managing legacy company level executive review filters

The level of impact is Low

Legacy Executive Review Filters Removed from Administrator Tools (3/3)

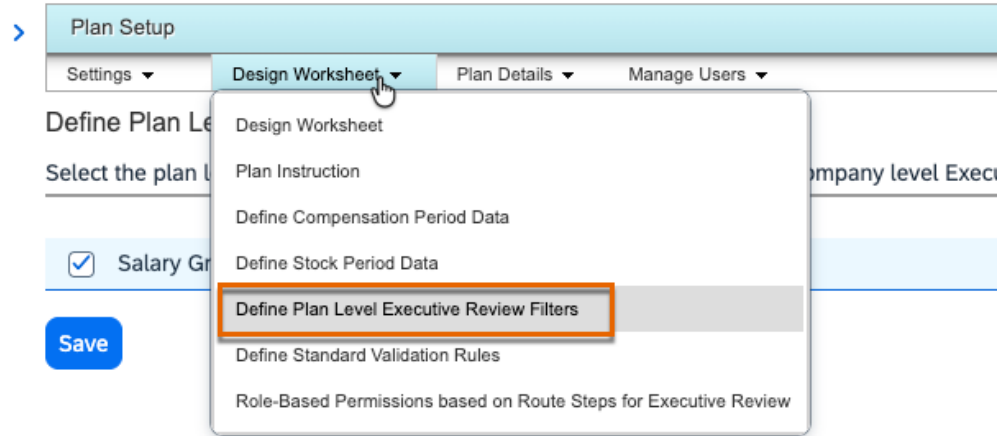
- We've removed the page for **Plan Setup > Design Worksheet Define Plan Level Executive Review Filters**

Type: Changed

Lifecycle: General Availability

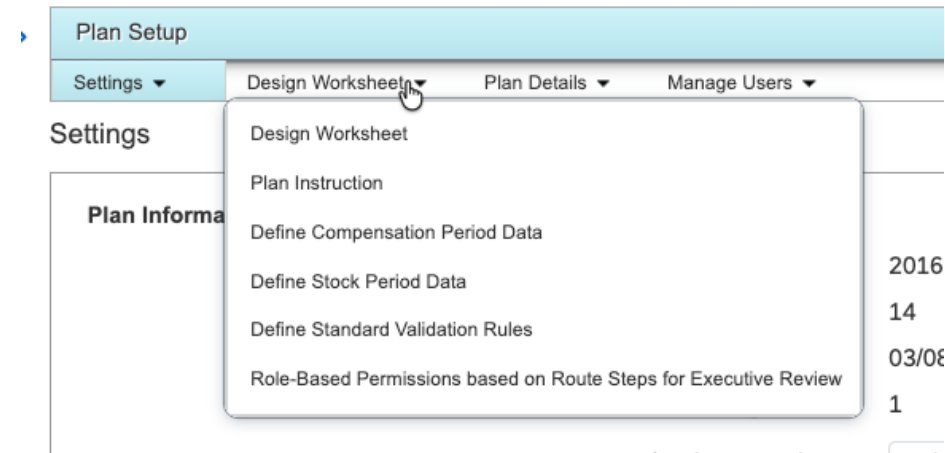
Enablement: Automatically on

How It Looked Before



You could access the **Define Plan Level Executive Review Filters** page

How It Looks Now



You now can't access the page used to define the legacy plan level filters

The level of impact is Low

Mass Recall Statements by File Upload (1/2)

You can now recall personal compensation statements for up to 20,000 users by uploading a CSV file containing either User IDs or usernames of the individuals whose statements must be recalled.

This feature allows administrators to upload a CSV file containing user IDs or usernames to initiate a mass recall or deletion of statements. In **Compensation Home**, choose a template and then go to **Complete Compensation Cycle > Rewards Statements > Recall Statements**.

You see the new radio button option **Recall by import file**. Choose to recall by **usernames or User IDs**. with a new **Upload** button. Select the Upload button to upload the User IDs or usernames. The system also flags issues related to an incorrect file format or its content.

This enhancement is from [Customer Influence Idea 304619](#).

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

How It Looked Before

Recall Statements

Select a personal statement template

Select by personal statement template

All Templates

- Select by employee name
 Select by list of usernames

Recall Statements

You didn't have the option to recall a large number of personal compensation statements.

The level of impact is Low

Mass Recall Statements by File Upload (2/2)

How It Looks Now

Publish Data ▾ Rewards Statements ▾ Manage Notifications ▾ Goal Statements

Recall Statements

Select a personal statement template

- Recall by statement template. All statements based on the personal statement
- Recall by employee name.
- Recall by usernames
- Recall by import file. Choose to recall by usernames or User IDs.

Recall Statements

Import Employees

Upload usernames or User IDs of employees to recall statements. Use a CSV file with Unicode (UTF-8) encoding.

Choose File

[Download a blank CSV template file if recalling by User IDs](#)

[Download a blank CSV template file if recalling by usernames](#)

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

You can upload a CSV file to recall or delete statements, with validation and error handling to ensure smooth processing.

The level of impact is Low

New Expand / Collapse Icon for Column Grouping

We've introduced a new button (⌵ *Expand All*, and ⌶ *Collapse All*) to the Compensation worksheets so you're able to expand and collapse all column groups at once when working with a worksheet. Also, we've updated the expand/collapse icon for column grouping in the UI to make it more visible and usable.

Your planners benefit from this update as it improves the clarity and usability of the interface. This enhancement is from [Customer Influence Idea 268078](#).

Type: Changed

Lifecycle: General Availability

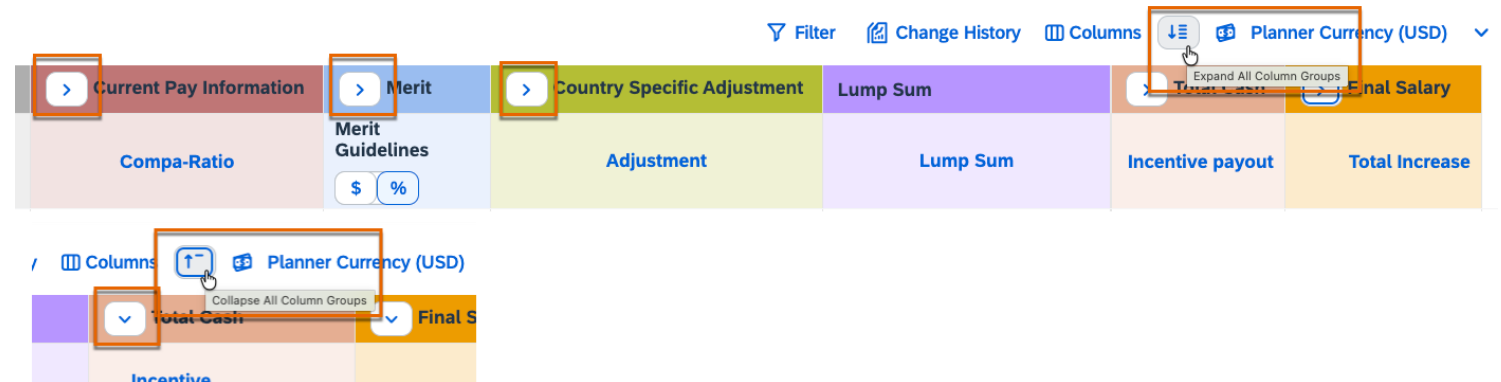
Enablement: Automatically on

How It Looked Before



The expand/collapse icon for column grouping was less intuitive.

How It Looks Now



The user interface features an updated expand/collapse icon for column groups, providing a clearer and more user-friendly experience. You can also use a new button to expand or collapse all columns at once.

The level of impact is Low

Reward Statements Transfer from Inactive to Active Employment (1/2)

You can now transfer Personal Reward Statements for an employee from their inactive to active employment using the **Manage Individual Talent Data Transfer** tool.

The level of impact is Low

You can also access the **Transfer History** for an employee to access the past transfers made for the employee.

By including the Personal Reward Statements in the **Manage Individual Talent Data Transfer** tool, we ensure that you're also able to transfer Reward statements from inactive to active employment.

You thus now also have access to historic compensation data for employees such as rehires or those employees who have completed a global assignment or concurrent employment.

Type: New

Lifecycle: General Availability

Enablement: Automatically on

Configuration Requirements:

Enable the data transfer tool through **Admin Center > Company System and Logo Settings > Enable Individual Talent Data Transfer from Inactive to Active Employment**. The following permissions were available in the previous version and are being listed so you're able to access the tool and the user data, make sure:

- You have the **Administrator Permissions > Manage System Properties > Company System and Logo Settings** permission to enable the data transfer tool.
- You have the **User Permissions > General User Permission > User Search** permission for the specified target population.
- You have the **Administrator Permissions > Manage Hires > Include Inactive Employees** in the search permission.
- You have permission to view the *status*, *title*, and *assignmentDisplayHeader* (if you've configured the fields in the data modal) under **User Permissions > Employee Data > Employee Profile**.
- Your permission role's target population controls which user you can transfer data for and whose transfer history you can monitor. It must include both inactive users (source employments of data transfer) and active users (target employments of data transfer).

Role-Based Permission Requirements:

- Make sure you have the **Administrator Permissions > Manage Compensation and Varpay > Transfer Compensation statements using Talent Data Transfer** tool permission.



Reward Statements Transfer from Inactive to Active Employment (2/2)

How It Looked Before

The option to transfer Personal Reward Statements using the **Manage Individual Talent Data Transfer** tool didn't exist.

Type: New

Lifecycle: General Availability

Enablement: Automatically on

How It Looks Now

Manage Individual Talent Data Transfer

Use this tool to transfer a person's talent data all at once from their inactive employment to their active employment, and keep track of the transfer history.

Select Person and Employments

Person: * ×

Source Employment: * ▼

Target Employment: *

Before transferring data, ensure you understand the data scope and that the target user and relevant stakeholders have the necessary permissions to access it. [Learn More](#)

Data Transfer Overview

Data Category	Total Number of Records
Performance Management forms	0
360 Reviews forms	0
Continuous Performance channels	0
Continuous feedback	0
Calibration	0
Compensation and Variable Pay Statements	0
Goal Statements	1
Bonus Assignment Statements	0

You can transfer Personal Reward Statements from inactive to active employment for an employee ensuring continuity and access to historical data.

The level of impact is Low

Statement Generation Report for Bonus Assignment Statements (1/2)

You can now generate a report that includes detailed information to track the status of bonus assignment statements for users.


Data in the report includes USER ID, USER NAME, FIRST NAME, LAST NAME, STATEMENT ASSIGNMENT, STATEMENT GENERATED, DEPARTMENT, DIVISION, MANAGER, LOCATION, JOB TITLE, and COUNTRY/REGION.

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

STATEMENT ASSIGNMENT and STATEMENT GENERATED columns display assigned and generated statement template names, leaving the STATEMENT GENERATED column blank if no statement is generated or if a statement is recalled. If a user is moved to a new template without regenerating, the old template name appears in the STATEMENT GENERATED column, while the new template name appears in the STATEMENT ASSIGNMENT column. If a user regenerates the statement after moving, the new template name is shown in both columns.

To run the report, go to **Compensation Home > Plan Setup > Bonus Assignment Statements** and click on the  Reward Statement Generation Report icon. You then choose View Scheduled Jobs button to access the job details.

This enhancement is from Customer Influence Idea [359667](#).

The level of impact is Low

Statement Generation Report for Bonus Assignment Statements (2/2)

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

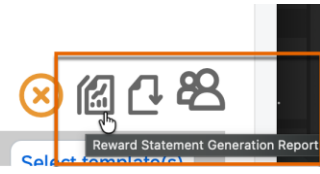
How It Looked Before

There was no comprehensive report or an efficient way to track the status of bonus assignment statement generation, making it difficult for you to manage and verify template assignments and generations.

How It Looks Now

Manage Bonus Assignment Statement Templates

Use this page to combine plans and associate statement templates. ?



Plans	Business + Individual Incentive Plan	Select template(s)
-------	--------------------------------------	--------------------

There's a new icon on the **Compensation Home > Plan Setup > Bonus Assignment Statements** page that when clicked generates a report that gives you an efficient way to figure out which employees were missed during bonus assignment statement generation.

A	B	C	D	E	F	G	H	I	J	K	L
USER ID	USER NAME	FIRST NAME	LAST NAME	STATEMENT ASSIGNMENT	STATEMENT GENERATED	DEPARTMENT	DIVISION	MANAGER	LOCATION	JOB TITLE	COUNTRY/REGION
325	325	Jose	Rojas	bonus assignment	bonus assignment	Auto Component Production CO (MC_CO_CP)	MC Automotive Production (MC_AP)	Sofia Moreno	Medellin Plant CO (MC_CO_MED)	MC Production Manager (MC_ProdMgr)	Colombia
100257				bonus assignment	bonus assignment	Shared Service Centre NA (MC_NA_SS)	MC Shared Services (MC_SS)	Eddie Phillips	Detroit HQ US (MC_US_DET)	MC HR Administrator (MC_HRAdmin)	United States
101013				bonus assignment	bonus assignment	Shared Service Centre EMEA (MC_EM_SS)	MC Shared Services (MC_SS)	Alison Mahoney	Leeds Regional HQ UK (MC_UK_LEE)	MC HR Administrator (MC_HRAdmin)	United Kingdom
101036				bonus assignment	bonus assignment	MC Auto Logistics UK (MC_UK_AL)	MC Automotive Shipping (MC_AS)	Alexis Moore	Leeds Plant UK (MC_UK_LEE2)	MC Logistics Operative (MC_Lop)	United Kingdom
344				bonus assignment	bonus assignment	Human Resources MX (MC_MX_HR)	MC Global Human Resources (MC_GHR)	Dimas Almeida	Mexico City Regional HQ MX (MC_MX_MC)	MC HR Administrator (MC_HRAdmin)	Mexico
80282				bonus assignment	bonus assignment	MC Auto Research US (MC_US_AR)	MC Automotive Engineering (MC_AE)	Erik Hansen	Detroit Plant US (MC_US_DET2)	MC Automotive Engineer (MC_AEng)	United States
80291				bonus assignment	bonus assignment	MC Auto Warehouse US (MC_US_AW)	MC Automotive Shipping (MC_AS)	John Huddleson	Detroit Plant US (MC_US_DET2)	MC Warehouse Manager (MC_WMgr)	United States
802985				bonus assignment	bonus assignment	MC Aviation Design US (MC_US_AVDE)	MC Aviation Engineering (MC_AVE)	Paul Cook	San Diego Plant US (MC_US_SAN)	MC Junior Aviation Engineer (MC_AVI/Eng)	United States
325				bonus assignment	bonus assignment	Auto Component Production CO (MC_CO_CP)	MC Automotive Production (MC_AP)	Jose Rojas	Medellin Plant CO (MC_CO_MED)	MC Automotive Technician (MC_Atech)	Colombia

The Reward Statement Generation Report report includes detailed data and accurately reflects the status of bonus statement assignments and generations.

The level of impact is Low



Template-Level Permission Control for the Route Form Tool (1/2)

As a Role-Based Permissions (RBP) administrator, you can now control which forms are accessible in the **Route Form** admin tool by applying the **Route Document** permission to specific form templates. This enhancement is available in Performance Management, 360 Reviews, and Compensation.

In the **Manage Permission Roles** admin tool, under **Administrator Permissions > Manage Documents > Route Document**, you can now use a setting to specify which form templates this permission applies to.

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

If this permission is already granted to a role, the setting defaults to **All**, so the role can continue to view and route forms from all templates using **Route Form**. If you restrict this permission to specific templates, the role can only access these templates and forms created from them.

We've also adjusted the display and labels of **Route Document's** child permissions.

This enhancement provides more granular permission control over mass routing, helping improve security and compliance by reducing unauthorized actions and operational errors.

Configuration Requirements:

- If you've already added the **Route Document** permission to any permission roles, please note that it will be temporarily removed after the Preview or Production release on Friday. It will be automatically restored over the weekend. If you need this permission during the interim period, you can manually add it back so related tasks can be performed.

The level of impact is Low

Template-Level Permission Control for the Route Form Tool (2/2)

The level of impact is Low

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

How It Looked Before

- Route Document †
 - Include Completed Documents †
 - Allow Adding of a Step †

There was no template-level setting for the Route Document permission. The two child permissions were indented under their parent and named Include Completed Documents and Allow Adding of a Step.

How It Looks Now

- Route Document †
 - All 360 Review × Annual Performance Review × 3 more ▾ ⓘ
- Route Document: Include Completed Documents (only works when "Route Document" is selected) †
- Route Document: Allow Adding of a Step (only works when "Route Document" is selected) †

You can choose **All** templates or select specific templates for the **Route Document** permission. The two child permissions are horizontally aligned with their parent and renamed to the following:

- **Route Document: Include Completed Documents (only works when "Route Document" is selected)**
- **Route Document: Allow Adding of a Step (only works when "Route Document" is selected)**

Deep Dive Topic



Advanced Mass Actions for Compensation Executive Review (1/3)

Planners can now use enhanced **Mass Action** in Executive Review to adjust compensation values across filtered employee populations.

The level of impact is High

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

We've enhanced the UI as well as improved the **Mass Action** functionality. The changes include:

- Changes for up to 150 users are run on the fly. If greater than 150 users need changes, a job is scheduled.
- Budget details in a tabular form for before and after application of Mass Action so planners can assess the impact of their changes.
- Editable fields on the template from salary, bonus, and stock tabs are available under **Program**
- The label and the column ID in the column designer are displayed in the **Program** dropdown.
- We now support additional criteria for Mass Action such as **Guideline** and **Pay Range**.
- Guideline is available for Mass Action if it is configured for a field. The **Mode of Modification** available is based on the guideline configuration.
- Pay Range is available for fields such as Merit (merit), Adjustment (extra), Adjustment2 (extra2), and Promotion (promotion).
- Changes do not apply to values set to zero.
- Filters on the Executive Review are respected for **Mass Action**

This enables bulk adjustments to custom compensation fields while maintaining visibility into budget impacts. It reduces manual effort and ensures consistent application of compensation changes across large employee populations. Also, since you can now run **Mass Action** for fewer than 150 employees right away, you can run comparisons and make the changes in more efficient manner quickly.



Advanced Mass Actions for Compensation Executive Review (2/3)

Configuration Requirements:

- Go to **Compensation Home > Actions for all plans > Company Settings**. Check the **Enable Advanced Mass Action** to enable the enhanced features for Mass Action.
- Editable fields on the template with appropriate field-based permissions are available for **Mass Action**.
- If Merit is set to split to lump sum, **Mass Action** is only available for lump sum.

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

How it Looked Before

Mass Action

> Instructions

Program

Adjustment

Action

✓ Increase

Decrease

Modify the total program cost by USD %

Apply

Preview

Reset

Cancel

The Program dropdown list in the Mass Action dialog box displayed fewer options for Mass Action. Budget information was not visible in the Mass Action dialog and the Preview report did not include budget comparison rows.

The level of impact is High

Advanced Mass Actions for Compensation Executive Review (3/3)

How it Looks Now

Mass Action for Total Program Cost

Applying Selected Filter:

42 employees - Outside Violation

[Select a Different Filter](#)

Program: *

Adjustment (extra)

[Fixed](#) [Guideline](#) [Pay Range](#)

[> Instructions](#)

Mode of Modification: *

- Guideline Minimum
- Guideline Low
- Guideline Default
- Guideline High
- Guideline Maximum

[Apply](#) [Preview](#) [Reset](#) [Cancel](#)

Preview of Mass Action to be applied:

Budgets		Merit+Lump Sum	Adjustment	Adjustment %	Stock	Options
Before						
	Planned	USD 320,402.41	USD 64,080.50	2.00%	164,665	545,000
	Allocated	USD 7,641,485,654.11	USD 610.28	0.02%	164,665	545,000
	More to Allocate	USD -7,641,165,251.70	USD 63,470.22	1.98%	0	0
After						
	Planned	USD 320,402.41	USD 64,080.50	2.00%	164,665	545,000
	Allocated	USD 7,641,485,654.11	USD 736.72	0.02%	164,665	545,000
	More to Allocate	USD -7,641,165,251.70	USD 63,343.78	1.98%	0	0

Execution Results							
Employee Name	Final Salary in Functional Currency	Local Currency Code	Final Salary Change in Functional Currency	Current Salary in Local Currency	Final Salary in Local Currency	Status	Program Value
	USD 218,436.00	USD	USD 0.00	USD 200,400.00	USD 218,436.00	No recommendation entered	USD 0.00 (USD 0.00) / 0.00% USD 0.00 (USD 0.00)
	USD 57,092.73	KRW	USD 0.00	KRW 58,200,000.00	KRW 60,528,000.00	No recommendation entered	KRW 0.00 (USD 0.00) / 0.00% KRW 0.00 (USD 0.00)
	USD 51,324.60	KRW	USD 0.00	KRW 52,320,000.00	KRW 54,412,800.00	No recommendation entered	KRW 0.00 (USD 0.00) / 0.00% KRW 0.00 (USD 0.00)

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

When **Mass Action** dialog is open, the **Program** dropdown list includes custom fields as well as standard fields that are editable and permitted with field-based permissions. After selecting a program, you also have options such as **Guideline** or **Pay Range** to use depending on the field. You also have the option of **Fixed** amount or percent that was available in legacy Mass Action. The **Preview** includes budget amounts before and after the Mass Action.

The level of impact is High

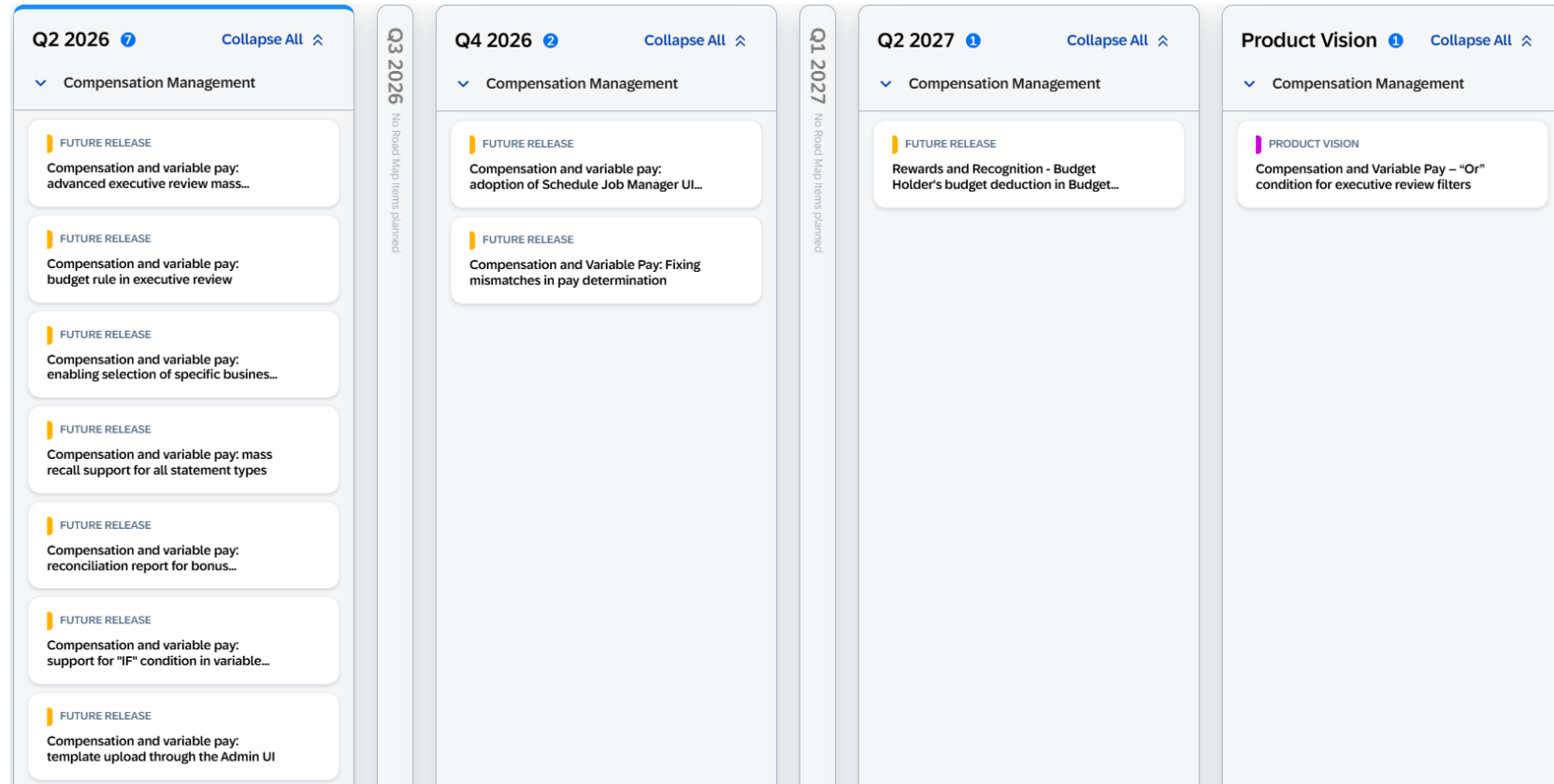


Product Road Map



Product Road Map

- Check out the roadmap for this module [here](#).
- SAP maintains product specific road map on SAP.com website – road map explorer
- Requires S-user login credentials, same as for the SuccessFactors Customer Community
- You can create & save your own “product mix” so you get a roadmap tailored to your solution landscape
- Road map is updated on regular basis





Thank you

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