

HR891

SAP SuccessFactors Agent Performance Management

COURSE OUTLINE

Course Version: 2305

Course Duration:

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Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation



Demonstration



Procedure



Warning or Caution



Hint



Related or Additional Information



Facilitated Discussion



User interface control

Example text

Window title

Example text

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Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

UNIT 1

Overview of Agent Performance Management

Lesson 1: Introduction to Agent Performance Manager Enterprise Edition

Lesson Objectives

After completing this lesson, you will be able to:

- Summarize the features and benefits of APMe
- Define the key concepts of APMe

Lesson 2: The APM User Interface

Lesson Objectives

After completing this lesson, you will be able to:

- Use the data dictionary
- Navigate the APMe User Interface
- Search for various types of data
- Use the Data Dictionary

Lesson 1: Configuring Security

Lesson Objectives

After completing this lesson, you will be able to:

- Create a Security Group
- Create a User and Assign them to a Group
- Configure Password Policies for a User

Lesson 2: Customizing the APMe User Interface

Lesson Objectives

After completing this lesson, you will be able to:

- Customize Menus
- Create an Entity Field
- Customize Field Labels, Codes, and Dropdown Lists
- Define field validations and dependencies
- Configure forms

Lesson 3: Other Configuration Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Configure settings
- Enable or disable a global feature
- Configure languages

Lesson 4: The APMe Data Model

Lesson Objectives

After completing this lesson, you will be able to:

- Open the SQL Workbench

- Identify the purpose and key fields on broker and customer tables
- Identify Primary and Foreign Keys

UNIT 3

Managing Producers, Brokers and Vendors

Lesson 1: Producers, Brokers and Vendors

Lesson Objectives

After completing this lesson, you will be able to:

- Understand the concepts of Brokers, Producers and Vendors
- Create a Producer Record

Lesson 2: Brokers vs. Producers

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Relationship between the producer and the payee
- Add Producer Details

Lesson 3: Producer Credentials

Lesson Objectives

After completing this lesson, you will be able to:

- Licenses and Appointments
- Create Credentialing Data

Lesson 1: Managing Customers

Lesson Objectives

After completing this lesson, you will be able to:

- Name the key fields of the customer record
- Manage Customer Records

Lesson 2: Managing Policies

Lesson Objectives

After completing this lesson, you will be able to:

- Name the key fields of the policy record
- Add a policy to a customer record

Lesson 3: Producer Ownership

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the relationship between customers, policies, and ownership
- Add a match rule to a policy record
- Add a split commission to a policy record

Lesson 1: The APMe Integration Portal

Lesson Objectives

After completing this lesson, you will be able to:

- Navigate the Integration Portal in APMe
- Identify the components of the Integration Portal

Lesson 2: The Data Import Process

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the components of Importing in APMe

Lesson 3: Posting a File

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the basic steps of the APMe posting process.
- Identify the type of validations performed in the posting process
- Post a Broker File
- Resolve posting errors

Lesson 4: Import Formats

Lesson Objectives

After completing this lesson, you will be able to:

- Understand the purpose of an import format
- Create a simple Import Format from an Excel file

Lesson 5: File Sweeps

Lesson Objectives

After completing this lesson, you will be able to:

- Understand the purpose of File Sweep
- Create a simple File Sweep process

Lesson 1: Commission Schedules

Lesson Objectives

After completing this lesson, you will be able to:

- Create a Commission Schedule

Lesson 2: Transactions

Lesson Objectives

After completing this lesson, you will be able to:

- Understand the purpose of Global Transaction Defaults
- Import transactions
- Post and Test a Transaction

Lesson 3: Payouts

Lesson Objectives

After completing this lesson, you will be able to:

- Define a Payout
- Set the Current Period
- Create a manual Adjustment
- Create a Bonus

Lesson 4: Voucher Processing

Lesson Objectives

After completing this lesson, you will be able to:

- Define Voucher Processing
- Identify the Key Components of the Voucher Functionality
- Explain the voucher task details
- Define the key voucher related fields

Lesson 5: Statements, Reporting, and Extracts

Lesson Objectives

After completing this lesson, you will be able to:

- Differentiate Statements, Reporting, and Extracts
- List and define the options for AP/Payroll Extract.

Lesson 1: Data Structures

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the main Broker based tables in APMe
- Identify the role of customer based tables in APMe
- Provide an overview of the transaction data and how it is processed in APMe to calculate commissions payments

Lesson 2: APMe Add-On Applications

Lesson Objectives

After completing this lesson, you will be able to:

- SAP Agent Connection
- APM Onboarding
- APM Compliance

Lesson 3: Glossary

Lesson Objectives

After completing this lesson, you will be able to:

- General Terms