HR891

SAP SuccessFactors Agent Performance Management

COURSE OUTLINE

Course Version: 2505
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:

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UNIT 1

Getting Started with SAP SuccessFactors Agent Performance Management

Lesson 1: Getting Started with SAP SuccessFactors Agent Performance Management

Lesson Objectives

After completing this lesson, you will be able to:

- Summarize the features and benefits of SAP SuccessFactors Agent Performance Management.

Lesson 2: Navigating the SAP SuccessFactors Agent Performance Management User Interface

Lesson Objectives

After completing this lesson, you will be able to:

- Navigate the SAP SuccessFactors Agent Performance Management user interface.

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UNIT 2 Configuring the System

Lesson 1: Configuring Security

Lesson Objectives

After completing this lesson, you will be able to:

- Manage Security in SAP SuccessFactors Agent Performance Management.

Lesson 2: Customizing Menus, Fields and Lists

Lesson Objectives

After completing this lesson, you will be able to:

- Customize menus, fields, and lists.

Lesson 3: Configuring Forms

Lesson Objectives

After completing this lesson, you will be able to:

- Add fields and other entities to a form.

Lesson 4: Configuring Entity Lists

Lesson Objectives

After completing this lesson, you will be able to:

- Configure an entity list.

Lesson 5: Configuring Other Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Configure Global Features, add languages, and use cross references.

Lesson 6: Using the SQL Workbench

Lesson Objectives

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After completing this lesson, you will be able to:

- Use the SQL Workbench to create SQL queries.

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UNIT 3 Managing Producers, Brokers and Vendors

Lesson 1: Managing Producers, Brokers and Vendors

Lesson Objectives

After completing this lesson, you will be able to:

- Create and manage broker, producer, and vendor records.

Lesson 2: Managing Producer Credentials

Lesson Objectives

After completing this lesson, you will be able to:

- Create and manage producer credentials.

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UNIT 4 Customers, Policies and Ownership

Lesson 1: Managing Customers

Lesson Objectives

After completing this lesson, you will be able to:

- Manage customer and policy records.

Lesson 2: Managing Policies

Lesson Objectives

After completing this lesson, you will be able to:

- Name the key fields of the policy record.

Lesson 3: Managing Producer Ownership

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the relationship between customers, policies, and ownership.

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UNIT 5 Integrating Data

Lesson 1: Navigating the Integration Portal in SAP SuccessFactors Agent Performance Management

Lesson Objectives

After completing this lesson, you will be able to:

- Import a file.

Lesson 2: Exploring the Data Import Process

Lesson Objectives

After completing this lesson, you will be able to:

- Import records into the system manually.

Lesson 3: Posting a File

Lesson Objectives

After completing this lesson, you will be able to:

- Post an import file and resolve posting errors.

Lesson 4: Creating Import Formats

Lesson Objectives

After completing this lesson, you will be able to:

- Create a custom import format.

Lesson 5: Creating File Sweeps

Lesson Objectives

After completing this lesson, you will be able to:

- Create a File Sweep process.

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UNIT 6 Calculating Commissions and Payouts

Lesson 1: Managing Commission Schedules

Lesson Objectives
After completing this lesson, you will be able to:

- Create a Commission schedule.

Lesson 2: Creating and Posting Transactions

Lesson Objectives
After completing this lesson, you will be able to:

- Import and post transactions.

Lesson 3: Managing Payouts

Lesson Objectives
After completing this lesson, you will be able to:

- Manage components of the Payout process.

Lesson 4: Using Pre-Computation and Post-Computation Compliance

Lesson Objectives
After completing this lesson, you will be able to:

- Describe the purpose of pre-computation and post-computation compliance.

Lesson 5: Processing Vouchers

Lesson Objectives
After completing this lesson, you will be able to:

- Manage voucher processing.

Lesson 6: Using RunLists

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Lesson Objectives
After completing this lesson, you will be able to:

- Use RunLists to track processes.

Lesson 7: Describing the Purpose of Multithreading

Lesson Objectives
After completing this lesson, you will be able to:

- Describe the purpose of multithreading.

Lesson 8: Creating Statements, Reports, and Extracts

Lesson Objectives
After completing this lesson, you will be able to:

- Differentiate between Statements, Reports, and Extracts

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UNIT 7 Appendix

Lesson 1: Data Structures

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the main Broker based tables in SAP SuccessFactors Agent Performance Management.

Lesson 2: APM Add-On Applications

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the features of SAP Agent Connection, APM Onboarding, and APM Compliance.

Lesson 3: Glossary

Lesson Objectives

After completing this lesson, you will be able to:

- Identify key terminology related to SAP SuccessFactors Agent Performance Management.

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