THR82

SAP SuccessFactors Performance and Goals Academy

COURSE OUTLINE

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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:

- Application Consultant

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UNIT 1 Getting Started with SAP SuccessFactors Performance and Goals Academy

Lesson 1: Preparing for Performance and Goals Academy

Lesson Objectives

After completing this lesson, you will be able to:

- Locate and access links to course files, implementation and product documentation resources needed to prepare for this course

Lesson 2: Exploring the Performance and Goal Management Modules and Tools

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the benefits and tools associated with SAP SuccessFactors Performance and Goals modules

Lesson 3: Preparing your Instance and Assigning Role-Based Permissions (RBPs)

Lesson Objectives

After completing this lesson, you will be able to:

- Verify your instance initial Provisioning and basic role-based permissions set up

Lesson 4: Compiling User Data

Lesson Objectives

After completing this lesson, you will be able to:

- Compile and upload user data

Lesson 5: Using the XML and DTD

Lesson Objectives

After completing this lesson, you will be able to:

- Use XML and document type definition (DTD) to configure Performance and Goals modules

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UNIT 2 Introducing Goal Management

Lesson 1: Managing Goals in Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the organization of goals in the Performance and Goals modules and identify the components of a goal plan

Lesson 2: Assigning Roles and Permissions in Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the roles involved in the goal management process and the relationship between permissions and goals

Lesson 3: Aligning Goals in Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Align goals using cascade methods

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UNIT 3 Setting Up and Configuring the Goal Plan Template

Lesson 1: Converting Templates in Latest Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Enable the latest version of Goal Management and convert a template

Lesson 2: Identifying the Elements of the Goal Plan Template

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the elements of the goal plan template

Lesson 3: Setting up and Managing a Goal Plan Template

Lesson Objectives

After completing this lesson, you will be able to:

- Set up and manage a goal plan template

Lesson 4: Configuring the Goal Plan Global Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the global settings, text replacement process and soft warnings in the goal plan template

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UNIT 4

Configuring Goal Plan Categories and Fields

Lesson 1: Configuring the Goal Plan Categories

Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Balanced Scorecard, create and manage categories used in the goal plan

Lesson 2: Configuring the Goal Plan Fields

Lesson Objectives

After completing this lesson, you will be able to:

- Create and manage standard and custom fields in a goal plan template

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UNIT 5 Configuring Goal Plan Permissions

Lesson 1: Configuring Goal Plan Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Set up field and action permissions in a goal plan template and configure goal plan states

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UNIT 6

Exploring Goal Management as an Administrator and End User

Lesson 1: Setting Up Features and Role-Based Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Explain main Goal Management concepts, including feature settings and role-based permissions related to Goal Management
- Manage goal libraries used in goal plan templates
- Identify the email notifications in Goal Management

Lesson 2: Exploring the Goal Plan as an End User

Lesson Objectives

After completing this lesson, you will be able to:

- Explore and use the goal plan as an end user

Lesson 3: Creating and Importing Goals

Lesson Objectives

After completing this lesson, you will be able to:

- Create and import personal goals
- Create and manage Team Goals
- Create and manage Initiatives

Lesson 4: Using and Setting Up Dynamic Teams Integration with Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Introduce Dynamic Teams
- Describe Objectives and Key Results (OKR's)
- Enable the Goal Management Integration with Dynamic Teams

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- Use Dynamic Teams to create OKRs and integrate them with Performance Goals

Lesson 5: Using Generative AI in Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the SAP Business AI capabilities applicable to Goal Management

Lesson 6: Configuring AI Capabilities for Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Review the AI Service Administration capabilities for Goal Management

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UNIT 7

Introducing Performance Management

Lesson 1: Describing the Principles and Tools of Performance Management

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the basic principles, components, and historical evolution of Performance Management form templates

Lesson 2: Establishing Workflow and Recording Evaluations with the Performance Form

Lesson Objectives

After completing this lesson, you will be able to:

- Identify stages and steps within a route map and how to record evaluations with rating scales in the performance form

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UNIT 8 Using Competencies in Performance Management

Lesson 1: Identifying Competencies

Lesson Objectives

After completing this lesson, you will be able to:

- Define competencies

Lesson 2: Defining Competency Libraries, Competency Attributes and Performance Details

Lesson Objectives

After completing this lesson, you will be able to:

- Describe competency libraries, competency attributes and performance details

Lesson 3: Managing Competencies and Competency Libraries

Lesson Objectives

After completing this lesson, you will be able to:

- Manage competencies and competency libraries, and map competencies to job roles

Lesson 4: Creating and Using Writing Assistant and Coaching Advisor content

Lesson Objectives

After completing this lesson, you will be able to:

- Use Writing Assistant and Coaching Advisor content to provide feedback details on a competency assessment

Lesson 5: Exploring the Talent Intelligence Hub

Lesson Objectives

After completing this lesson, you will be able to:

- Explore the Talent Intelligence Hub
- Configure the Talent Intelligence Hub Settings

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Lesson 6: Mapping Competencies and Skills to Job Roles

Lesson Objectives

After completing this lesson, you will be able to:

- Map competencies and skills to job roles

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UNIT 9

Setting Up and Configuring the Performance Form Template

Lesson 1: Setting Up the Form Template

Lesson Objectives

After completing this lesson, you will be able to:

- Identify the methods of uploading and updating Performance Management templates

Lesson 2: Working with the Global Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Identify and configure general and advanced form template settings

Lesson 3: Setting Up Initial Configurations

Lesson Objectives

After completing this lesson, you will be able to:

- Edit field and sections in a form template
- Edit ratable sections in a form template

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UNIT 10

Configuring Sections in Performance Form Templates

Lesson 1: Configuring Basic Standard Sections

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the introduction, employee information, review information and signature sections

Lesson 2: Configuring the Goal Sections

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the goal section(s)

Lesson 3: Configuring the Competency Sections

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the competency sections

Lesson 4: Configuring the Summary Section

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the overall summary section

Lesson 5: Introducing the Objective Competency Summary Section

Lesson Objectives

After completing this lesson, you will be able to:

- Introduce the objective/competency summary section

Lesson 6: Configuring Custom Sections

Lesson Objectives

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After completing this lesson, you will be able to:

- Configure custom sections and fields

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UNIT 11

Configuring Permissions in Performance Form Templates

Lesson 1: Identifying Permission Types in a Form Template

Lesson Objectives

After completing this lesson, you will be able to:

- Identify permission types that can be configured in a form template

Lesson 2: Configuring Permissions in a Form Template

Lesson Objectives

After completing this lesson, you will be able to:

- Configure permissions in a form template

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UNIT 12

Exploring Performance Management as an Administrator and End User

Lesson 1: Identifying Performance Management Key Features and Permissions

Lesson Objectives

After completing this lesson, you will be able to:

- Identify Performance Management design decisions, features, and permissions from an administrator and end user perspective

Lesson 2: Preparing and Managing the Performance Management Review Cycle

Lesson Objectives

After completing this lesson, you will be able to:

- Identify components of the performance form
- Create and access the form in the Performance Management Inbox
- Prepare and manage the Performance Management review cycle

Lesson 3: Setting Up The Team Overview and Stack Ranker

Lesson Objectives

After completing this lesson, you will be able to:

- Configure Team Overview tools and Stack Ranker

Lesson 4: Using AI-Assisted Writing in Performance and 360 Reviews

Lesson Objectives

After completing this lesson, you will be able to:

- Use AI capabilities to enhance content writing in Performance Management and 360 Reviews

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UNIT 13 Using Calibration in Performance Management

Lesson 1: Outlining Calibration in Performance Management

Lesson Objectives

After completing this lesson, you will be able to:

- Describe Calibration in performance management, including tools and roles

Lesson 2: Configuring Calibration Settings

Lesson Objectives

After completing this lesson, you will be able to:

- Enable Calibration and configure the route map, grant role-based permissions, and complete the initial set up

Lesson 3: Configuring the Calibration Template

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Calibration template

Lesson 4: Creating and Managing Calibration Sessions

Lesson Objectives

After completing this lesson, you will be able to:

- Create and manage Calibration sessions

Lesson 5: Using Calibration as an End User

Lesson Objectives

After completing this lesson, you will be able to:

- Navigate a Calibration session as an end user

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UNIT 14

Deploying Continuous Performance Management and Feedback

Lesson 1: Introducing and Configuring Continuous Performance Management

Lesson Objectives

After completing this lesson, you will be able to:

- Introduce, enable and configure Continuous Performance Management

Lesson 2: Using Continuous Performance Management to Increase Work Performance

Lesson Objectives

After completing this lesson, you will be able to:

- Describe and use the different views of Continuous Performance Management and their main functions

Lesson 3: Configuring and Using Continuous Feedback

Lesson Objectives

After completing this lesson, you will be able to:

- Configure and use continuous feedback options

Lesson 4: Using AI-Assisted Writing in Continuous Performance and Feedback

Lesson Objectives

After completing this lesson, you will be able to:

- Use AI capabilities to enhance content writing in Continuous Performance and Feedback

Lesson 5: Identifying Continuous Performance Management Integrations

Lesson Objectives

After completing this lesson, you will be able to:

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- Identify the integration points between Continuous Performance Management and other SAP SuccessFactors modules

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UNIT 15 Deploying 360 Reviews

Lesson 1: Introducing 360 Reviews

Lesson Objectives

After completing this lesson, you will be able to:

- Explain the purpose of 360 Reviews and the 360 Detailed Report and complete initial configurations

Lesson 2: Setting Up 360 Reviews Form Templates

Lesson Objectives

After completing this lesson, you will be able to:

- Enable and configure 360 Reviews and initiate the form template set up

Lesson 3: Configuring the Rater Section

Lesson Objectives

After completing this lesson, you will be able to:

- Configure the rater section in a 360 Reviews form template

Lesson 4: Configuring Standard and Ratable Sections

Lesson Objectives

After completing this lesson, you will be able to:

- Configure other sections in a 360 Reviews form template

Lesson 5: Managing the 360 Reviews Process

Lesson Objectives

After completing this lesson, you will be able to:

- Manage the 360 Reviews process as an administrator
- Manage the 360 Reviews process as an end user

Lesson 6: Navigating 360 Executive Review

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Lesson Objectives

After completing this lesson, you will be able to:

- Enable and view 360 form completion progress in Executive Review

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UNIT 16 Implementing Translations

Lesson 1: Configuring Translations in Goal Management

Lesson Objectives

After completing this lesson, you will be able to:

- Configure translations in Goal Management

Lesson 2: Configuring Translations in Performance Management

Lesson Objectives

After completing this lesson, you will be able to:

- Configure translations in Performance Management

Lesson 3: Configuring Other Translations

Lesson Objectives

After completing this lesson, you will be able to:

- Identify other areas to add and update translations

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