

# THR82

## SAP SuccessFactors Performance and Goals Academy

### COURSE OUTLINE

Course Version: 2311

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*

# Contents

## ix Course Overview

### 1 Unit 1: Getting Started with SAP SuccessFactors Performance and Goals Academy

- 1 Lesson: Preparing for Performance and Goals Academy
- 1 Lesson: Exploring the Performance and Goal Management Modules and Tools
- 1 Lesson: Preparing your Instance and Assigning Role-Based Permissions (RBPs)
- 1 Lesson: Compiling User Data
- 1 Lesson: Using the XML and DTD

### 3 Unit 2: Introducing Goal Management

- 3 Lesson: Managing Goals in Goal Management
- 3 Lesson: Assigning Roles and Permissions in Goal Management
- 3 Lesson: Aligning Goals in Goal Management

### 5 Unit 3: Setting Up and Configuring the Goal Plan Template

- 5 Lesson: Identifying the Elements of the Goal Plan Template
- 5 Lesson: Setting up and Managing a Goal Plan Template (GMv12)
- 5 Lesson: Upgrading to the Latest Goal Management version
- 5 Lesson: Configuring the Goal Plan Global Settings

### 7 Unit 4: Configuring Goal Plan Categories and Fields

- 7 Lesson: Configuring the Goal Plan Categories
- 7 Lesson: Configuring the Goal Plan Fields

### 9 Unit 5: Configuring Goal Plan Permissions

- 9 Lesson: Configuring Goal Plan Permissions

### 11 Unit 6: Exploring Goal Management as an Administrator and End User

- 11 Lesson: Setting Up Features and Role-Based Permissions
- 11 Lesson: Exploring the Goal Plan as an End User
- 11 Lesson: Creating and Importing Goals
- 11 Lesson: Objectives and Key Results (OKRs)

<b>13</b>	<b>Unit 7:</b>	<b>Introducing Performance Management</b>
13		Lesson: Describing the Principles and Tools of Performance Management
13		Lesson: Establishing Workflow and Recording Evaluations with the Performance Form
<b>15</b>	<b>Unit 8:</b>	<b>Using Competencies in Performance Management</b>
15		Lesson: Identifying Competencies
15		Lesson: Defining Competency Libraries, Competency Attributes and Performance Details
15		Lesson: Managing Competencies and Competency Libraries
15		Lesson: Creating and using Writing Assistant and Coaching Advisor content
<b>17</b>	<b>Unit 9:</b>	<b>Setting Up and Configuring the Performance Form Template</b>
17		Lesson: Setting Up the Form Template
17		Lesson: Working with the Global Settings
17		Lesson: Setting Up Initial Configurations
<b>19</b>	<b>Unit 10:</b>	<b>Configuring Sections in Performance Form Templates</b>
19		Lesson: Configuring Basic Standard Sections
19		Lesson: Configuring the Goal Sections
19		Lesson: Configuring the Competency Sections
19		Lesson: Configuring the Summary Section
19		Lesson: Introducing the Objective Competency Summary Section
19		Lesson: Configuring Custom Sections
<b>21</b>	<b>Unit 11:</b>	<b>Configuring Permissions in Performance Form Templates</b>
21		Lesson: Identifying Permission Types in a Form Template
21		Lesson: Configuring Permissions in a Form Template
<b>23</b>	<b>Unit 12:</b>	<b>Exploring Performance Management as an Administrator and End User</b>
23		Lesson: Identifying Performance Management Key Features and Permissions
23		Lesson: Preparing and Managing the Performance Management Review Cycle
23		Lesson: Setting Up The Team Overview and Stack Ranker

**25      Unit 13:      Using Calibration in Performance Management**

25	Lesson: Outlining Calibration in Performance Management
25	Lesson: Configuring Calibration Settings
25	Lesson: Configuring the Calibration Template
25	Lesson: Creating and Managing Calibration Sessions
25	Lesson: Using Calibration as an End User

**27      Unit 14:      Deploying Continuous Performance Management and Feedback**

27	Lesson: Introducing and Configuring Continuous Performance Management
27	Lesson: Using Continuous Performance Management to Increase Work Performance
27	Lesson: Configuring and Using Continuous Feedback
27	Lesson: Identifying Continuous Performance Management Integrations

**29      Unit 15:      Deploying 360 Reviews**

29	Lesson: Introducing 360 Reviews
29	Lesson: Setting Up 360 Reviews Form Templates
29	Lesson: Configuring the Rater Section
29	Lesson: Configuring Standard and Ratable Sections
29	Lesson: Managing the 360 Reviews Process
29	Lesson: Navigating 360 Executive Review

**31      Unit 16:      Implementing Translations**

31	Lesson: Configuring Translations in Goal Management
31	Lesson: Configuring Translations in Performance Management
31	Lesson: Configuring Other Translations





# Course Overview

## **TARGET AUDIENCE**

This course is intended for the following audiences:

- Application Consultant



# 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



## 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



## Lesson 1: 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 2: Setting up and Managing a Goal Plan Template (GMv12)

### Lesson Objectives

After completing this lesson, you will be able to:

- Set up and manage a goal plan template

## Lesson 3: Upgrading to the Latest Goal Management version

### Lesson Objectives

After completing this lesson, you will be able to:

- Enable the latest version of Goal Management and convert a 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





## 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



## 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



## 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:

- Exploring 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
- Creating and managing team goals

## Lesson 4: Objectives and Key Results (OKRs)

### Lesson Objectives

After completing this lesson, you will be able to:

- Introduce Dynamic Teams
- Describe the concept of Objectives and Key Results (OKR's)
- Enable the Goal Management Integration with Dynamic Teams
- Using Dynamic Teams to create OKRs and integrate them with Performance Goals



## **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





## 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 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



## 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

After completing this lesson, you will be able to:

- Configure custom sections and fields

## 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





## 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 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: Configure the route map, grant role-based permissions, and complete the initial set up in Manage Calibration Settings

## 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:

- Creating and managing 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



## **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: Identifying Continuous Performance Management Integrations**

### **Lesson Objectives**

After completing this lesson, you will be able to:

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



## 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

## Lesson Objectives

After completing this lesson, you will be able to:

- Enable and view 360 form completion progress in Executive Review



## 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