

# THR82

## SAP SuccessFactors Performance and Goals Management Academy

### COURSE OUTLINE

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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	<i>Example text</i>
Window title	<i>Example text</i>



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# Course Overview

## **TARGET AUDIENCE**

This course is intended for the following audiences:

- Business Analyst
- Solution Architect
- System Administrator



## Lesson 1: Preparing for Performance and Goals Academy

### Lesson Objectives

After completing this lesson, you will be able to:

- Summarize the course objectives and content
- Describe self-paced learning methodology

## Lesson 2: Implementation and Product Documentation

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify implementation and product documentation resources

## Lesson 3: Using Performance and Goals Product Modules and Provisioning

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify the benefits and tools associated with SAP SuccessFactors Performance and Goals modules
- Describe the basic components of the SAP SuccessFactors Performance and Goals product modules
- Describe the User Interface and the main navigation options

## Lesson 4: Assigning Role-Based Permissions (RBPs)

### Lesson Objectives

After completing this lesson, you will be able to:

- Manage role-based permissions (RBP)

## Lesson 5: Compiling User Data

### Lesson Objectives

After completing this lesson, you will be able to:

- Compile user data

## **Lesson 6: XML, DTDs and Validation**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Describe the use of XML in the configuration of the Performance and Goals modules
- Describe the use of DTDs in the configuration of the Performance and Goals modules
- Explain how to enable proxy access

## Lesson 1: Managing Goals in Goal Management

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the purpose and functions of Goal Management
- Identify the components of a goal plan
- Explain the organization of goals in the Performance and Goals module

## 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
- Define the term Line of Sight
- Describe the relationship between permissions and goals when configuring the Performance and Goals module

## Lesson 3: Aligning Goals in Goal Management

### Lesson Objectives

After completing this lesson, you will be able to:

- Align goals using cascade methods

## Lesson 4: Managing Goals and Goal Libraries

### Lesson Objectives

After completing this lesson, you will be able to:

- Manage goal libraries
- Add a goal using the Goal Wizard
- Outline the goal transfer process

## **Lesson 5: Creating and Importing Group Goals**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Manage group goals

## Lesson 1: Identifying the Elements and Resources of the Goal Plan

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify the elements of the goal plan template
- Describe the goal library and the goal wizard

## Lesson 2: Managing Goal Plan Templates

### Lesson Objectives

After completing this lesson, you will be able to:

- Set up a goal plan template
- Download a goal plan template
- Manage the sections of a goal plan template
- Implement version control

## Lesson 3: Modifying the Global Settings of a Goal Plan Template

### Lesson Objectives

After completing this lesson, you will be able to:

- Edit the global settings of a goal plan template
- Format goal numbering to customer specifications

## Lesson 4: Replacing Text and Defining Minimum and Maximum Values in Goal Management

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the text replacement process in Goal Management
- Implement minimum and maximum counts and weights in goalplans





## Lesson 1: Commonly Used Categories

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the categories and default category used in the goal plan
- Describe the Balanced Scorecard

## Lesson 2: Creating Goal Plan Categories

### Lesson Objectives

After completing this lesson, you will be able to:

- Create categories in a goal plan template using Admin Center and XML
- Configure the <category> and <default-category> elements, including category minimum and maximum counts and weights



## Lesson 1: Describing Goal Fields

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe goal fields and prerequisites
- Describe field definitions

## Lesson 2: Editing Goal Fields

### Lesson Objectives

After completing this lesson, you will be able to:

- Create a goal field
- Define the types and attributes of the goal fields

## Lesson 3: Creating Special Field Types

### Lesson Objectives

After completing this lesson, you will be able to:

- Create special field types

## Lesson 4: Creating Custom Fields and Link Fields

### Lesson Objectives

After completing this lesson, you will be able to:

- Create custom fields in the goal plan using Manage Templates and XML
- Describe the creation of a link field in the goal plan using Manage Templates



## Lesson 1: Outlining Permissions in Goal Management

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe field permissions
- Explain how enabling role-based permissions affects field permissions in the goal plan
- Enable the cascader role

## Lesson 2: Implementing Field and Action Permissions

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure field permissions
- Configure action permissions
- Configure table permissions

## Lesson 3: Configuring Goal Plan States

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure goal plan states



## Lesson 1: Configuring the Goal Plan Layout

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Goal Plan layout of the Goal Management module
- Configure the Goal Plan layout in XML





## Lesson 1: Introducing and Configuring Continuous Performance Management

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe Continuous Performance Management
- Explain how to enable Continuous Performance Management
- Describe the process for configuring and enabling role-based permissions for employees, managers and administrators
- Summarize the process of configuring Continuous Performance Management

## Lesson 2: Using Continuous Performance Management to Increase Work Performance

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify the main views of Continuous Performance Management
- List the primary features and functions of Continuous Performance Management
- Describe the Activities View
- Describe the Meeting View
- Describe the Achievements View
- Explain how Continuous Performance Management can be integrated with other SAP SuccessFactors modules
- Activate, Permission and Use Continuous Performance Management

## Lesson 3: Configuring and Using Continuous Feedback

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain options available with Continuous Feedback
- Enable and permission Continuous Feedback

- Describe Request Feedback functionality
- Describe Give Feedback functionality

## Lesson 1: Identifying Competencies

### Lesson Objectives

After completing this lesson, you will be able to:

- Define competencies

## Lesson 2: Describing Competency Libraries and Performance Details

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe competency libraries
- Describe competency attributes
- Describe performance details

## Lesson 3: Modifying Competency Libraries

### Lesson Objectives

After completing this lesson, you will be able to:

- Manage competency library
- Manage competencies using the Action menu and competency library

## Lesson 4: Improving Feedback with Writing Assistant and Coaching Advisor

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain how to provide feedback with the Writing Assistant and Give Advice tab in PMv12 Acceleration

## Lesson 5: Managing Job Families, Job Roles, and Job Codes

### Lesson Objectives

After completing this lesson, you will be able to:

- Create job families
- Create job roles
- Add job codes
- Map competencies to job roles

## 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 of Performance Management
- Convert a Performance Management form to PMv12 Acceleration

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

### Lesson Objectives

After completing this lesson, you will be able to:

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

## Lesson 3: Creating a Performance Form

### Lesson Objectives

After completing this lesson, you will be able to:

- Create a performance form

## Lesson 4: Describing Roles for Performance Management and Accessing the Document Type Definition (DTD)

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify roles to define Performance Management permissions
- Access the Document Type Definition (DTD) and implementation guides
- Explain the relevance of 'order of elements' within the Performance Management XML template



## Lesson 1: Using the Performance Management Template

### Lesson Objectives

After completing this lesson, you will be able to:

- Copy the Performance Management Template
- Describe the methods of form creation permissions
- Identify the methods of updating Performance Management Templates

## Lesson 2: Managing Performance Management Template Settings

### Lesson Objectives

After completing this lesson, you will be able to:

- Modify general settings in Manage Templates and the XML file
- Identify Performance Management email notifications

## Lesson 3: Managing the Performance Form

### Lesson Objectives

After completing this lesson, you will be able to:

- Launch the performance form
- Test the performance form
- Delete the performance form
- Restore a deleted performance form
- Manage performance form changes during the performance review cycle
- Describe form status reports

## Lesson 4: Adding and Modifying Sections in Manage Templates and XML

### Lesson Objectives

After completing this lesson, you will be able to:

- Add sections in Manage Templates and XML

## **Lesson 5: Configuring Section Attributes in the Performance Form**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Configure rating scales
- Configure comment settings
- Configure the option to add a section item
- Configure item weights and section summary
- Define basic section settings in the performance form
- Describe additional features of the PMv12 Acceleration Form



## Lesson 1: Configuring the Performance Form

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Introduction section
- Configure the Employee Information section
- Configure the Review Information and Signature sections



## **Lesson 1: Describing the Basic Structure of the Objective (Goal) Section(s) in the Performance Form**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Describe the objective (goal) section(s) in the performance form
- Compare auto-populate and auto-sync in the objective (goal) section(s)

## **Lesson 2: Configuring the Objective (Goal) Section(s)**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Configure the objective (goal) section(s)

## **Lesson 3: Populating Goals in the Performance Form**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Configure auto-populate and auto-sync in the performance form
- Add goals to the performance form
- Edit goal options on a performance form



## Lesson 1: Configuring the Competency Section of the Performance Form

### Lesson Objectives

After completing this lesson, you will be able to:

- Identify the basic elements and attributes of the competency section
- Configure basic elements and attributes of a competency section
- Populate competencies to a section



## Lesson 1: Describing the Design Process for Sections, Weights, and Functionality in the Performance Form

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the design of a performance form
- Define the performance form sections
- Define the difference between summary and Objective/Competency summary sections

## Lesson 2: Configuring Item and Section Weights

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure item and section weights

## Lesson 3: Configuring the Summary Section and Ratings

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the configuration of the summary section
- Describe the configuration of final ratings and calculated overall ratings

## Lesson 4: Configuring the Objective/Competency Summary Section

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Objective/Competency summary section of the performance form





## Lesson 1: Configuring Custom Sections and Fields

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure custom sections and fields



## Lesson 1: Describing Performance Form Permission Configuration Elements

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe performance form permission configuration elements



## Lesson 1: Defining Stack Ranker and Team Overview

### Lesson Objectives

After completing this lesson, you will be able to:

- Describe the Stack Ranker tool
- Describe Team Overview

## Lesson 2: Configuring the Stack Ranker Tool

### Lesson Objectives

After completing this lesson, you will be able to:

- Define the functionality of Team Overview in PMv12 Acceleration performance forms
- Configure Team Overview in PMv12 Acceleration performance forms



## Lesson 1: Defining Calibration in the Performance Review Cycle

### Lesson Objectives

After completing this lesson, you will be able to:

- Define calibration in the performance review cycle

## Lesson 2: Calibrating Performance Forms

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure calibration in Provisioning
- Grant calibration permissions
- Describe the creation of a calibration route map

## Lesson 3: Configuring the Calibration Template

### Lesson Objectives

After completing this lesson, you will be able to:

- Create a new calibration template
- Configure the Basic Info tab
- Configure the Data tab
- Configure the Views tab
- Configure the Advanced tab
- Enable Executive Review

## Lesson 4: Configuring Calibration Sessions

### Lesson Objectives

After completing this lesson, you will be able to:

- Create a calibration session
- Edit an existing calibration session

- Manage calibration sessions
- Define calibration email notifications
- Create manager initiated calibration sessions
- Demonstrate how to configure Calibration



## Lesson 1: Defining 360 Reviews

### Lesson Objectives

After completing this lesson, you will be able to:

- Explain the purpose of 360 reviews
- Define the 360 review process

## Lesson 2: Configuring 360 Review Forms

### Lesson Objectives

After completing this lesson, you will be able to:

- Define 360 review reports
- Configure 360 review form templates

## Lesson 3: Configuring the 360 Review Form Attributes Section

### Lesson Objectives

After completing this lesson, you will be able to:

- Define the 360 review form attributes section
- Define radio buttons in the 360 review form attributes section
- Define the parameters of rater categories in the 360 review form

## Lesson 4: Configuring the Rater, Review Information, Competency, Goals, and Email Notification Sections of 360 Review Forms

### Lesson Objectives

After completing this lesson, you will be able to:

- Configure the Rater Section in 360 review forms
- Configure the Review Information Section in 360 review forms
- Configure the Competency and Objective (Goal) Sections in 360 review forms

## **Lesson 5: Managing the 360 Review Process**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Delete, decline, complete, and restore 360 review forms
- Route 360 review forms to various steps in the review process
- Change the process owner or participants in 360 Review forms

## **Lesson 6: Navigating 360 Executive Review**

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Enable and view 360<sup>o</sup> form completion progress in Executive Review

## Lesson 1: Defining the Language Pack Translation Process

### Lesson Objectives

After completing this lesson, you will be able to:

- Define the steps of the language pack translation process
- Define the scope of the language pack translation project
- Define the elements of translation configuration in a language pack
- Identify potential roadblocks in the language pack translation project

## Lesson 2: Defining Considerations and the Purpose of the Language Pack Translation

### Lesson Objectives

After completing this lesson, you will be able to:

- Define considerations in the language pack translation in Provisioning
- Define the purpose of the translation workbook

## Lesson 3: Configuring Language Pack Translations in Goal Management

### Lesson Objectives

After completing this lesson, you will be able to:

- Define language pack translations in Goal Management

## Lesson 4: Configuring Translations in Performance Management

### Lesson Objectives

After completing this lesson, you will be able to:

- Define language pack translations in Performance Management



## Lesson 1: Defining Integration in Performance and Goal Management

### Lesson Objectives

After completing this lesson, you will be able to:

- Define modules that integrate with the Goal Management and Performance Management products

## Lesson 2: Defining the Goal Management and Performance Management Integration Process

### Lesson Objectives

After completing this lesson, you will be able to:

- Define key integration points for Goal Management and Performance Management with other SAP SuccessFactors products
- Define how data is integrated in Goal Management and Performance Management