Administrator Training Guide

SAP SuccessFactors Career Development Planning and Mentoring Administration (HR842)

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About this Handbook

This handbook is intended to complement the instructor-led presentation of this course, and serve as a source of reference. American English is the standard used in this handbook. The following typographic conventions are also used:

Use	Example/Visualization
Demonstration by Instructor A hint or advanced detail is shown or clarified by the instructor – please indicate reaching any of these points to the instructor	
Warning or Caution A word of caution – generally used to point out limitations or actions with potential negative impact that need to be considered consciously	
Hint A hint, tip or additional detail that helps increate performance of the solution or help improve understanding of the solution	
Additional information An indicator for pointing to additional information or technique beyond the scope of the exercise but of potential interest to the participant	
Discussion/Group Exercise Used to indicate that collaboration is required to conclude a given exercise. Collaboration can be a discussion or a virtual collaboration.	
User Interface Text	Find the *Flavor Gallery* button
Solution or SAP Specific term	E.g. *Flavors* are transaction specific screen personalization created and rendered using SAP Screen Personas.

Course Introduction

Overview

Through discussion, demonstration, and hands-on exercises, this course uses the concepts and terminology associated with SAP SuccessFactors Career Development Planning (CDP) functionalities and helps you develop a working knowledge for use in implementing your career strategy. You will gain basic skills in how to use SAP SuccessFactors Career Development Planning as an administrator and learn how to use the basic tools for managing Career Development Planning in your organization.

	Please note that “user” in this guide refers to the end-user or employee with access to Career Development module. The Career Development Planner is a typical role performed by the employee but may include any or all of the following: Managers, Directors, Executives or HR Representatives.

Target Audience

This is a guide intended for SAP SuccessFactors System Administrators responsible for one or all of the following:

- Providing permissions access to the employee or other roles
- Modifying CDP options or features within Admin Center
- Relaying end user actions for the differing tools

Course Objectives

Upon completion of this course, you will be able to:

- Provide and Determine CDP Permissions
- Modify or Engage Goal Notifications
- Configure v12 Development Plan Settings, Fields and Layout
- Configure v12 Career Worksheet Features
- Create and Launch a Standard Role Readiness Form
- Manage Career Paths V2 utilizing the MDF Generic Object
- Identify SAP SuccessFactors Learning Integration Features and Resources
- Introduce Our Latest Feature entitled Mentoring

Data Protection and Privacy Features:

	Data Protection and Privacy Features: With recent releases, several new data protection and privacy features have been made available to our customers and some existing features have been enhanced. The data protection and privacy features include, for instance, the ability to report on personal data changes and the capacity to report on all the data subject's personal data available in the application. Customers will also have options to configure data retention rules at country level for active and inactive employees that will permanently purge personal data from SAP SuccessFactors applications. It is the customer's responsibility to adopt the features that they deem appropriate. More information can be found on the SAP Help Portal: http://help.sap.com/cloud4hr

SAP SuccessFactors Community

Customer Community is your one-stop shop for support, quick answers, product training and quarterly release updates. You may also post ideas for enhancements on product-specific Q&A boards, and "Kudo" other ideas that you like. Enhancement ideas with the most kudos often become part of the product roadmap for future releases.

https://community.successfactors.com/

Additional Resources

For more information about SAP SuccessFactors, refer to these resources:

Main Website	http://www.SuccessFactors.com
SAP SuccessFactors Process Library	https://community.successfactors.com/t5/SAP-SuccessFactors-Process/ct-p/ProcessLibrary
Training and Certification Shop	https://training.sap.com/shop/learninghub
SAP SuccessFactors HCM Suite Help Portal	http://help.sap.com/cloud4hr

Unit 1 - Introduction

Unit Objectives

This unit contains two lessons:

- Lesson 1-1: Career Development Planning Overview
- Lesson 1-2: Career Development Planning Tools

Upon completing this unit, you will be able to:

- Describe the purpose of Career Development Planning (CDP)
- Identify the main options provided in Career Development Planning (CDP)

Lesson 1-1 - Career Development Planning Overview

Lesson Overview

The goal for this lesson is to provide the purpose and general navigation to Career Development Planning (CDP).

Lesson Objective

- Describe the purpose and general navigation of Career Development Planning
- Discuss the usage of Career Development Planning deep links on the home page

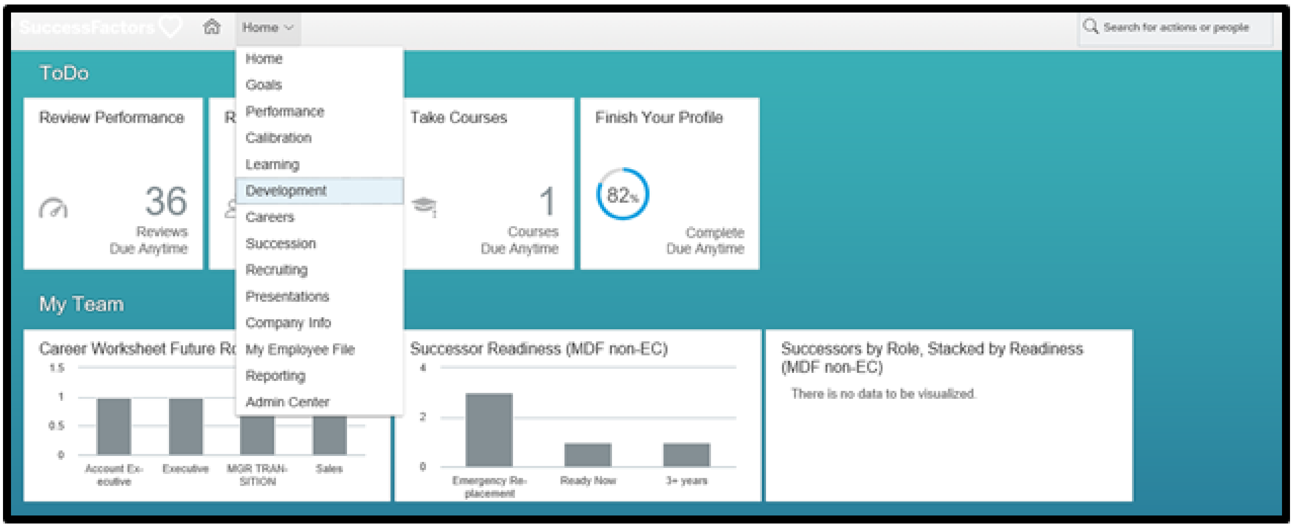
What is Career Development Planning (CDP)?

Career Development Planning (CDP):

- Focuses on engaging and retaining top talent by helping employees to build career development plans and track their progress.
- Allows for personal growth as employees take on development activities that are relevant and actionable where the follow-through is recorded.
- Empowers employees to plan their careers through identifying job roles and paths of interest and aspiring to build the competencies necessary to do those jobs well.
- Integrates learning activities and creates a transcript with the Learning Management System (LMS) for a more streamlined record for the learner.

Accessing Career Development Planning

Career Development Planning tools can be found under Development from the Home Navigation dropdown as in screenshot below:



End User View: Home > Development

You can modify the text in the Home menu as well as other places by utilizing text replacement within Admin Center.

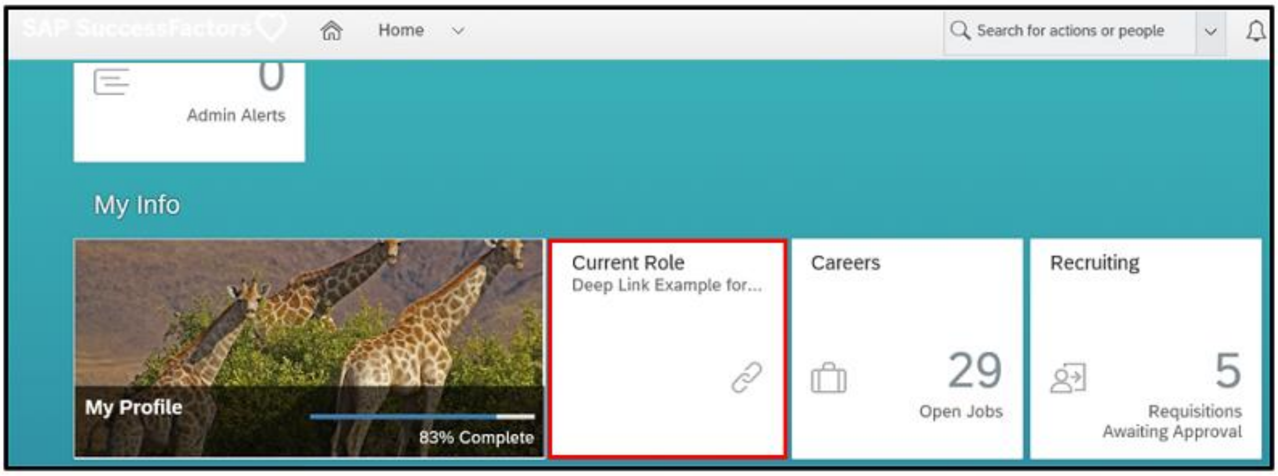
Deep Links within Career Development Planning

A deep link is a hyperlink that links directly to a specific page in the SAP SuccessFactors application, rather than the highest-level page. For all available options, search deep links within the platform section of help.sap.com. There are four deep links currently for the career development module listed:

Solution	Deep Link	Description	Parameters
Development	/sf/careerworksheet	Takes user to the Career Worksheet	selecteduser=<userid> (optional)
Development	sf/careerworksheet?currentrole=true	Takes user to the current role in the Career Worksheet	
Development	/sf/devplan	Takes user to development plan	selecteduser=<userid> (optional)
Development	/sf/mentoring	Takes user to mentoring	

Deep links can be used anywhere hyperlinks are possible. You can use them in offline content, such as your internal documentation or intranet sites on your company portal. They can also be used in third-party applications, such extensions built on the SAP Cloud Platform. You can even use deep links within the SAP SuccessFactors system itself, such as on a custom tile on the home page or in custom navigation links on the Employee Profile.

With this example, if employees want to focus on the current role assessment instead of the target roles, they can go to the current roles tab directly from a dedicated Home Page tile as below:



Whether accessing Career Development Planning through the homepage or the main navigation dropdown, there are several tools and options in the Career Development Planning (CDP) module like:

- Development Plan v12
- Career Worksheet v12
- Career Path v2
- CDP/LMS Integration
- Mentoring

This guide will identify and discuss these features in the next lesson.

Lesson Conclusion - Career Development Planning Overview

In this lesson, you were introduced to the general navigation of Career Development Planning (CDP) and the purpose of deep links. You should now be able to discuss it further.

Lesson 1-2 - Career Development Planning Tools

Lesson Overview

The goal for this lesson is to describe the main tools available in Career Development Planning.

Lesson Objective

- Identify the main features available in Career Development Planning

What are the Main Career Development Planning (CDP) Tools?

The main features available in Career Development Planning module are the Development Plan, Career Worksheet, Career Path, CDP integrated with the Learning Management System (LMS), and Mentoring.

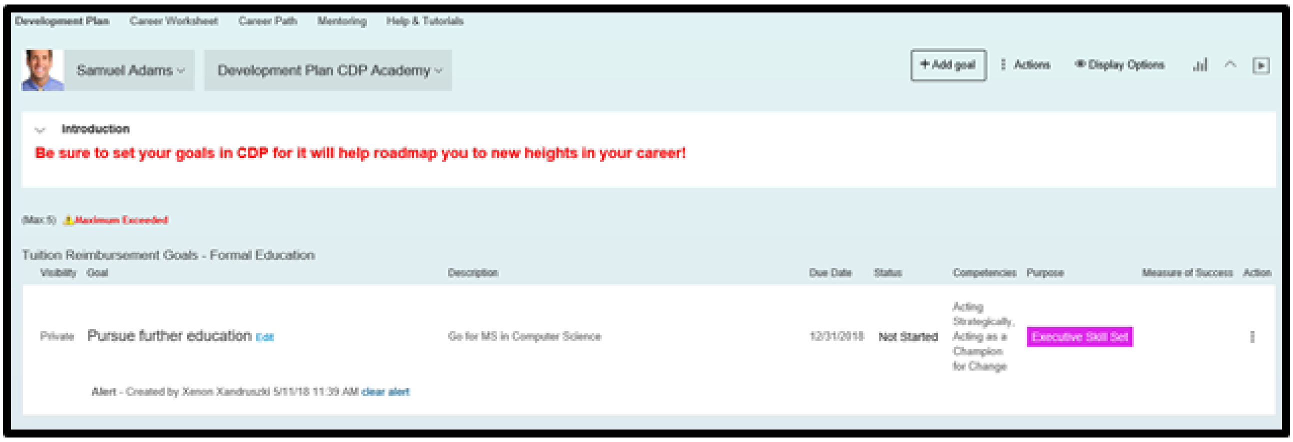
	This guide specifically addresses the Development Plan v12, Career Worksheet v12, Career Path v2, CDP/LMS Integration, and Mentoring. If you do not have these features in your system, you may need to speak with Professional Services to enable them or check the upgrade center in your instance.

Development Plan v12

The Development Plan v12 component of Career Development Planning (CDP):

- Enables key players to create actionable plans that address career goals.
- Is similar to an online worksheet which analyzes progress in one central place.
- Allows users to enter, edit, and track development objectives and learning activities directly online.
- Aids both employees and managers since:
  - Employees profit from personal development, career planning, and job satisfaction.
  - Managers benefit from having standardized methods to put their reports on the right track.

An example of a Development Plan follows:



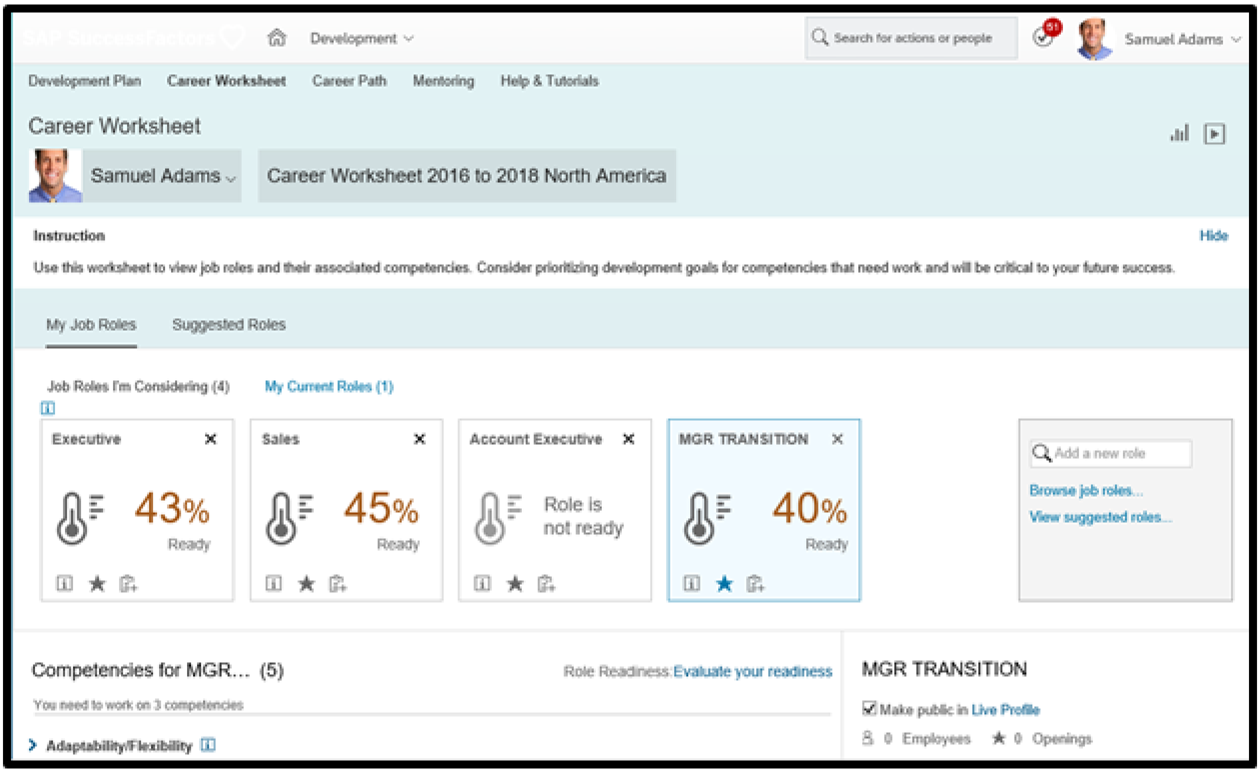
End User View: Home > Development > Development Plan

	You can modify some of the general settings, fields, and categories **by typing Manage Templates into the Action Search**. However, some configurations must be completed by a Professional Services Consultant.

Career Worksheet v12

The Career Worksheet v12 is a planning tool for users as they work on career development tasks.

- The worksheet allows users to view and gain understanding of the effort required to move into a future role.
- Each role on the worksheet shows the job code, description, and competencies required (as defined in Families & Roles).
- It can also display a gap analysis for each competency, comparing the last rating of record recorded for the employee with the expected rating for that role.

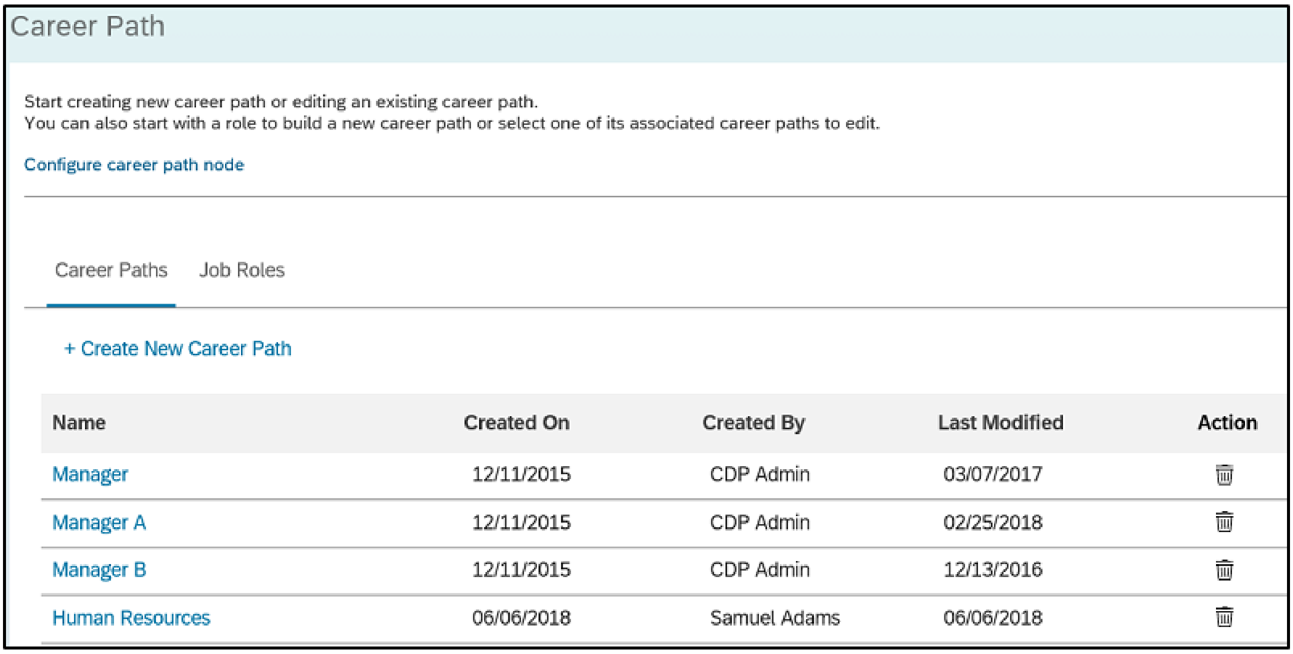


End User View: Home > Development > Career Worksheet

	If your organization uses the SAP SuccessFactors Learning Management System (LMS) or if legacy learning activities were enabled by your consultant, you will have the ability to assign learning activities.

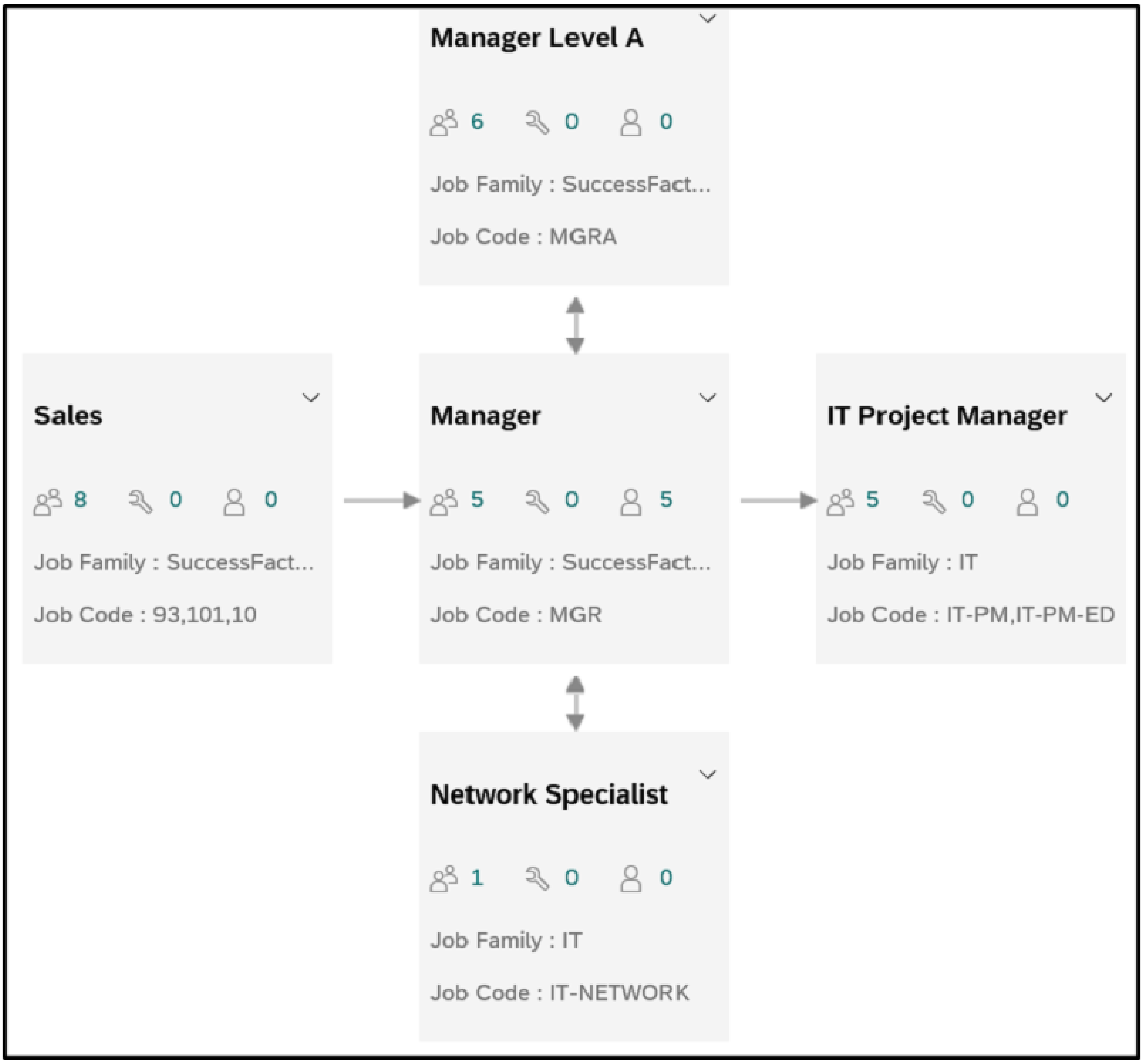
Career Path v2

The Career Path v2 displays information about the expected path for a position. Administrators or other assigned roles (HR managers, for example) are responsible for managing Career Paths. Career Path v2 enables the creation of unique and complex organizational career paths. HR managers or other assigned roles can create multiple new career paths, associate them to a given role, and restrict access as needed throughout the organization.



Home > Development > Career Path

When on the career path page, click on the name. If you do not have these options, you may need to make changes to your permissions within Admin Center > Set User Permissions > Manage Permission Roles.



Learning Activities with LMS Integration

Career Development Planning (CDP) is capable of integrating with the SAP SuccessFactors Learning Management System (LMS). However, you must have purchased the CDP and LMS modules as well as engage with Professional Services for this functionality. Once this implementation is completed, you will have additional capabilities and a transcript of learning activities tied between CDP and LMS.

Learning Activities for non-LMS Customers

Non-LMS customers can use a Learning Activity Template as part of CDP. End-users will have the option to create learning activities linked to their development goals. They will also be able to use a Learning Activity Catalog.

Mentoring

Mentoring typically refers to a development relationship where a more experienced or knowledgeable person provides guidance or coaching to a less experienced person. These relationships can be focused on things like personal growth, specific tasks, or professional development. Formal mentoring or coaching programs often involve a high degree of manual processing to match mentors and mentees. They also provide limited opportunity to track progress or report on results.

The Mentoring solution from SAP SuccessFactors provides you with a central and integrated tool to set up and run programs to manage your organization's structured mentoring relationships. It provides you with a framework for your development program management and can be applied to your leadership development, coaching, enablement, or job shadowing programs, just to name a few.

Using Mentoring to manage your development programs replaces the traditional, bulky, and manual processes and the spreadsheets that go with them. Mentoring provides you with the tools you need to define the program, invite mentors and mentees to participate, and then monitor the program to closing. You have the flexibility to define several different types of programs.

- Open Enrollment programs have no defined end date and are not managed by inviting participants but rather by allowing all employees, or a subgroup of employees, to see and sign up freely for a program. Users can sign up as both mentor and mentee in the same program.

- Supervised programs require the mentoring administrator to oversee the matching of mentees to mentors through auto-generated and manual matches. Mentoring administrators define program dates and manually push the program through each step. The program dates strictly control the program process, for example, mentor sign-up ends as soon as mentee sign-up starts.

- Unsupervised programs allow mentees to make direct requests to mentors without administrator intervention. The system still suggests mentors based on the same matching criteria used in the supervised programs, but no automatic matching occurs. The system automatically triggers the next step or status based on the program dates defined. Administrators can still push the program to the next step manually if they want to. The program date flexibility also allows mentees to sign up even after mentor sign-up has started.

Regardless of the type of mentoring program you create, each program follows a common general process. Once you've enabled Mentoring and assigned your administrators, you can create programs and define who can participate. Mentee and mentor matching takes place, either independently or with oversight, and you run and track the program before closing it.

Mentoring is such a popular tool of Career Development Planning that it has its own Administration Guide located in http://help.sap.com.

Figure 1: Overview of Mentoring

Lesson Conclusion - Career Development Planning Tools

In this lesson, you were introduced to the main tools within Career Development Planning.

Unit Wrap-Up

In this unit, you covered:

- Lesson 1-1: Career Development Planning Overview
- Lesson 1-2: Career Development Planning Tools

You should now be able to:

- Describe the purpose of Career Development Planning (CDP)
- Identify the main options provided in Career Development Planning (CDP)

Unit 2 - General CDP Permissions

Unit Objectives

This unit contains three lessons:

- Lesson 2-1: Role-Based Permissions for CDP
- Lesson 2-2: Administrator Permissions for CDP
- Lesson 2-3: User Permissions for CDP

Upon completing this unit, you will be able to:

- General Permissions Related to Career Development Planning
- Administrator Permissions required to change Career Development Planning
- End User Permissions needed to utilize Career Development Planning

Lesson 2-1 - Role-Based Permissions for CDP

Lesson Overview

The goal for this lesson is to introduce the Career Development Planning permissions utilizing Role-Based Permissions.

Lesson Objective

- Identify and grant access to the Role-Based Permissions needed for Career Development Planning

What Permissions are Utilized in Career Development Planning?

Role-Based Permissions are easy to maintain and allow for the creation of dynamic groups. This means that users who change roles or positions within the organization can automatically lose or inherit permissions. For SAP SuccessFactors Career Development Planning, this means that rather than individually granting each permission to each Career Development Planning User or Administrator, each role can have specialized permission levels.

This section describes how to enable the various permissions described in Exercise 2-1. As an initial step to utilizing Role-Based Permissions (RPB), the role must be granted to the following area called Manage Role-based Permission Access.

Admin Center > Set User Permissions > Manage Role-Based Permission Access.

Exercise - Enable Administrator to Manage Role-Based Permission Access

In this exercise, you will enable the Manage Role-Based Permission Access to an Administrator to give them access to Manage Permission Groups and Manage Permissions Roles.

1. Using the **Action Search**, locate **Manage Role-Based Permission** Access.
2. Click on the **Add User** button and search using the correct criteria like username.
3. Enable the checkbox by the user you want to grant access and press **Grant Permission**.
4. Logout and Log back in as the user or proxy to see your changes in the system.
5. Now, you should be able to see the **Manage Permission Groups** and **Manage Permissions Roles** which allows the Administrator to modify permissions for the Career Development Planning module as well as other SAP SuccessFactors modules.

!	This guide does not discuss Role-Based Permissions in depth. This guide only addresses permissions as they relate to Career Development Planning.

This concludes Exercise: Enable Administrator to Manage Role-Based Permission Access

Lesson Conclusion - Role-Based Permissions for CDP

In this lesson, you were introduced to Career Development Planning permissions utilizing Role-Based Permissions.

Lesson 2-2 - Administrator Permissions for CDP

Lesson Overview

The goal for this lesson is to introduce the Career Development Planning permissions specifically for the Administrator Role.

Lesson Objective

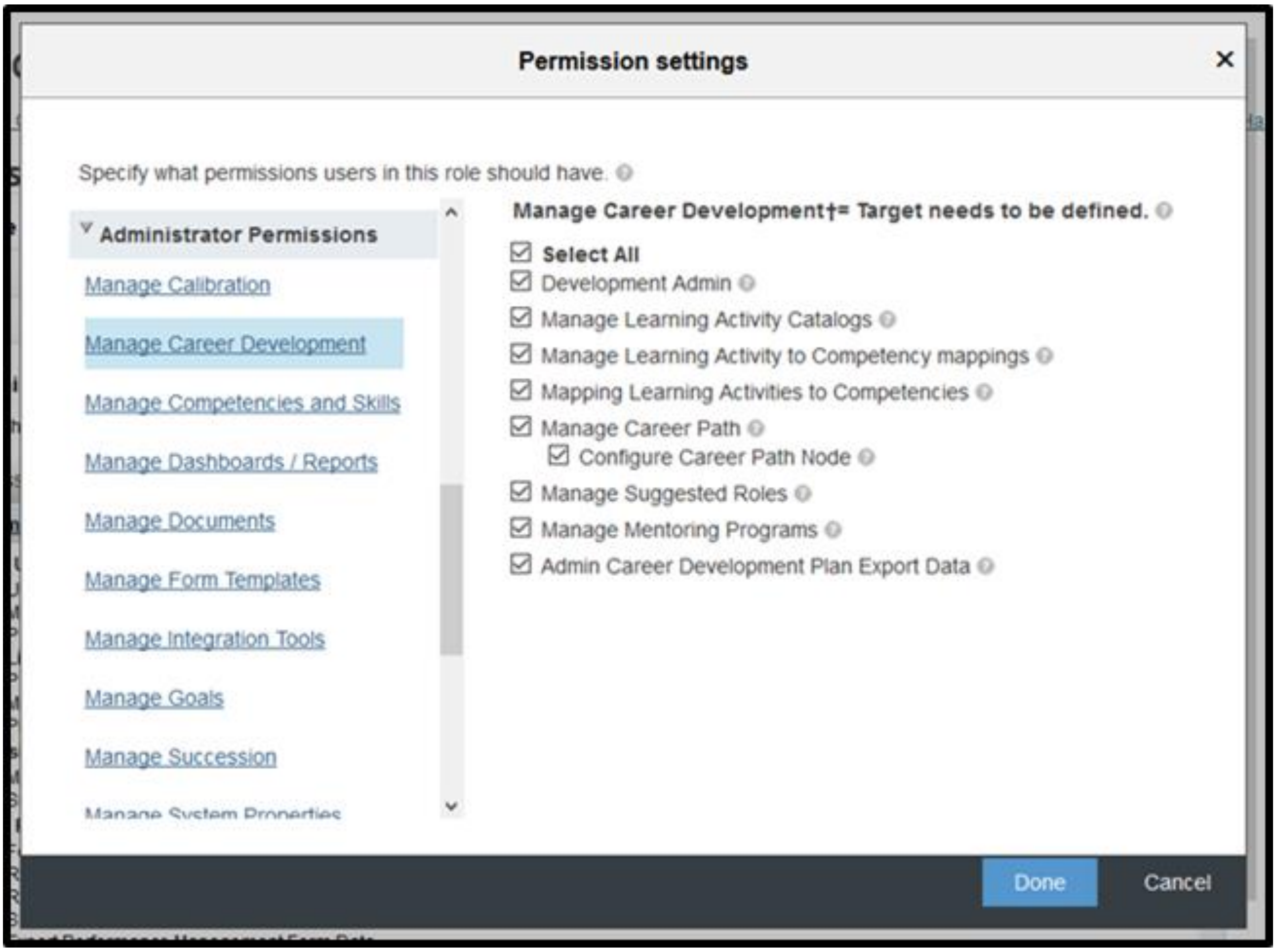
- Identify and grant access to the Administrator Role the permissions needed to modify or activate features within Career Development Planning

What Administrator Permissions are Important in Order to Change the Career Development Planning Features?

The Administrator role within SAP SuccessFactors typically changes or maintains the system features utilizing Admin Center. The role also tests and troubleshoots the end user view in order to optimize its functionality. Administrator Permissions are critical to the management of options available within Career Development Planning. Unique to this module, some of the Administrator Permissions below display in the End User view in addition to the Admin Center view. Below is a screenshot as well as a description of each permission enabled.

!	This lesson is not an all-inclusive list of Administrator permissions within the SAP SuccessFactors Suite. Permission options will vary based on the modules you have purchased and enabled with your Professional Services Consultant. For example, if you are using Employee Central, you may need have different options or need additional permissions for complete changes. This manual is constructed without the activation of Employee Central and the Job Profile Builder. Please review those Administrator Guides if you are using these products for further details of expected changes.

To view the Administrator Permissions pertaining to the CDP, click on Manage Career Development:



Administrator View: Admin Center > Set User Permissions > Manage Permission Roles

Permission Name	Area of Control
Development Admin	Allows role to manage development plan settings.
Manage Learning Activity Catalogs	Grants the ability to create a learning activity catalog for the end user.
Manage Learning Activity to competencies and Competency mappings	Grants the ability to map competencies to learning activities.
Manage Career Path	Allows role to define and manage Career Path.
Configure Career Path Node	Allows the **user** role to configure Career Path Node Details.
Manage Suggested Roles	Allows the user role to configure the suggested roles settings.
Manage Mentoring Programs	Allows ability to create mentoring programs

!	Many of these permissions options are triggered based on your original configuration from implementation. Consult with your Professional Services Consultant or Customer Success to change your viewing features.

Exercise - Enable Administrator Permissions for CDP

In this exercise, you will enable the Manage Career Development Permissions for an Administrator role.

1. Use the **Action Search** to select **Manage Permission Roles**.
2. Select the role to modify and then click on the **Permission** button.
3. Scroll toward the bottom until you see the **Manage Career Development** link.
4. Enable all the features available by choosing **Select All** checkbox.
5. Click **Done** and **Save Changes**.
6. Logout and Log back in as the user or proxy to see your changes in the system.
7. Now, the Administrator should be able to modify permissions for the Career Development Planning module as well as other SAP SuccessFactors modules.

!	Depending on the modifications needed, you may need to enable other Administrative Permissions related to that topic. For example, when using Career Path v2, you will need to enable Metadata Framework permissions as well.

This concludes Exercise: Administrator Permissions for CDP.

Lesson Conclusion - Administrator Permissions for CDP

In this lesson, you were introduced to Career Development Planning permissions specifically for the Administrator Role.

Lesson 2-3 - User Permissions for CDP

Lesson Overview

The goal for this lesson is to introduce the Career Development Planning permissions specifically for the End User Role.

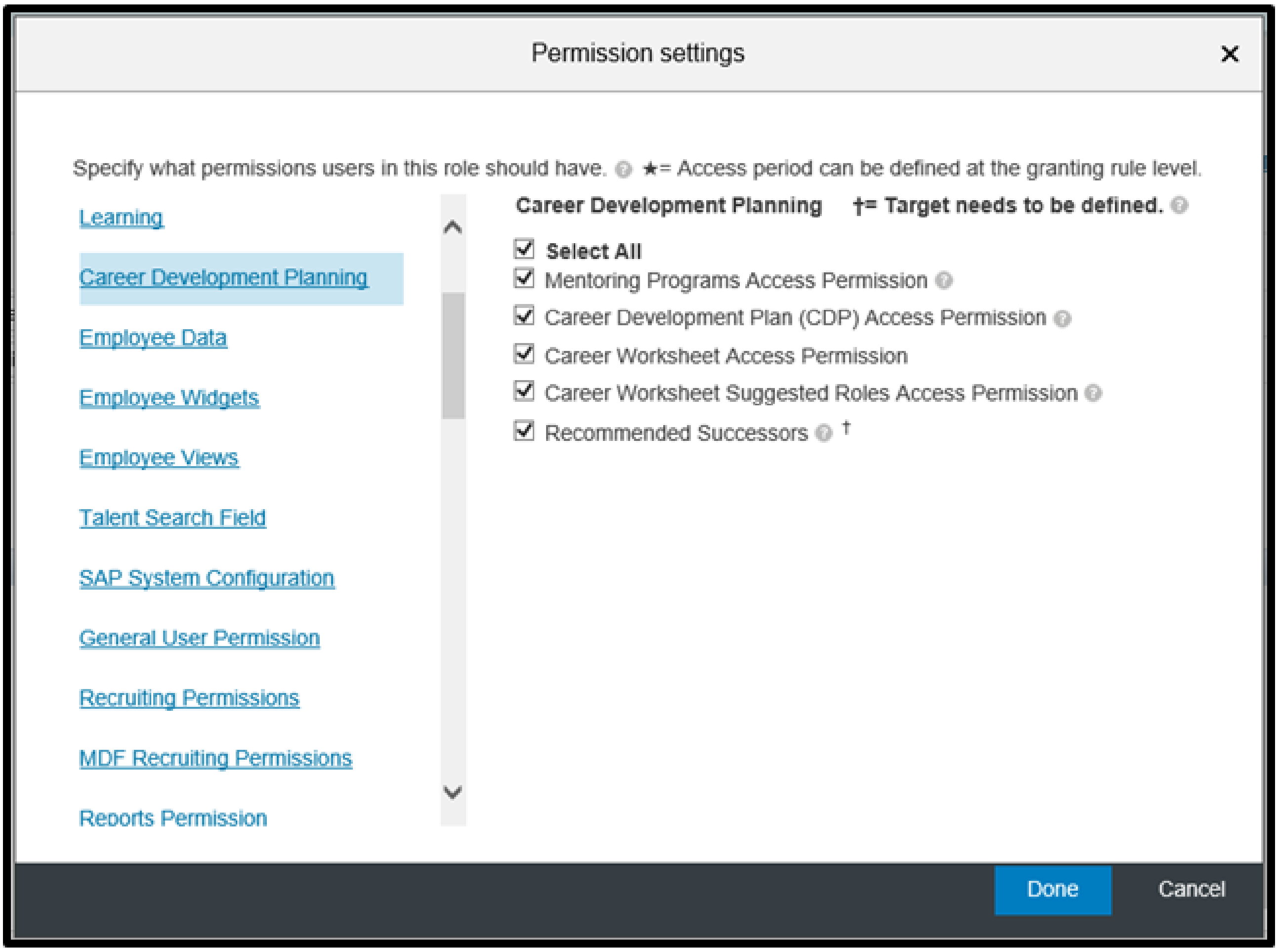
Lesson Objective

- Identify and grant permissions to the End User role needed to view or edit features within Career Development Planning

What Permissions are Important in Order to View or Edit the Career Development Planning Features as an End User?

The End User role within SAP SuccessFactors typically holds center stage for Career Development Planning. Unlike other modules where the functionality revolves around the management or leadership team, Career Development Planning truly focuses on empowering the employee to utilize the development plan, career worksheet and career path to obtain the necessary goals and competencies for future roles. In order to access these Career Development Tools, go to **Admin Center > Set User Permissions > Manage Permission Roles**. Select the end user or employee role and click on the Permission button and decide from the following options:

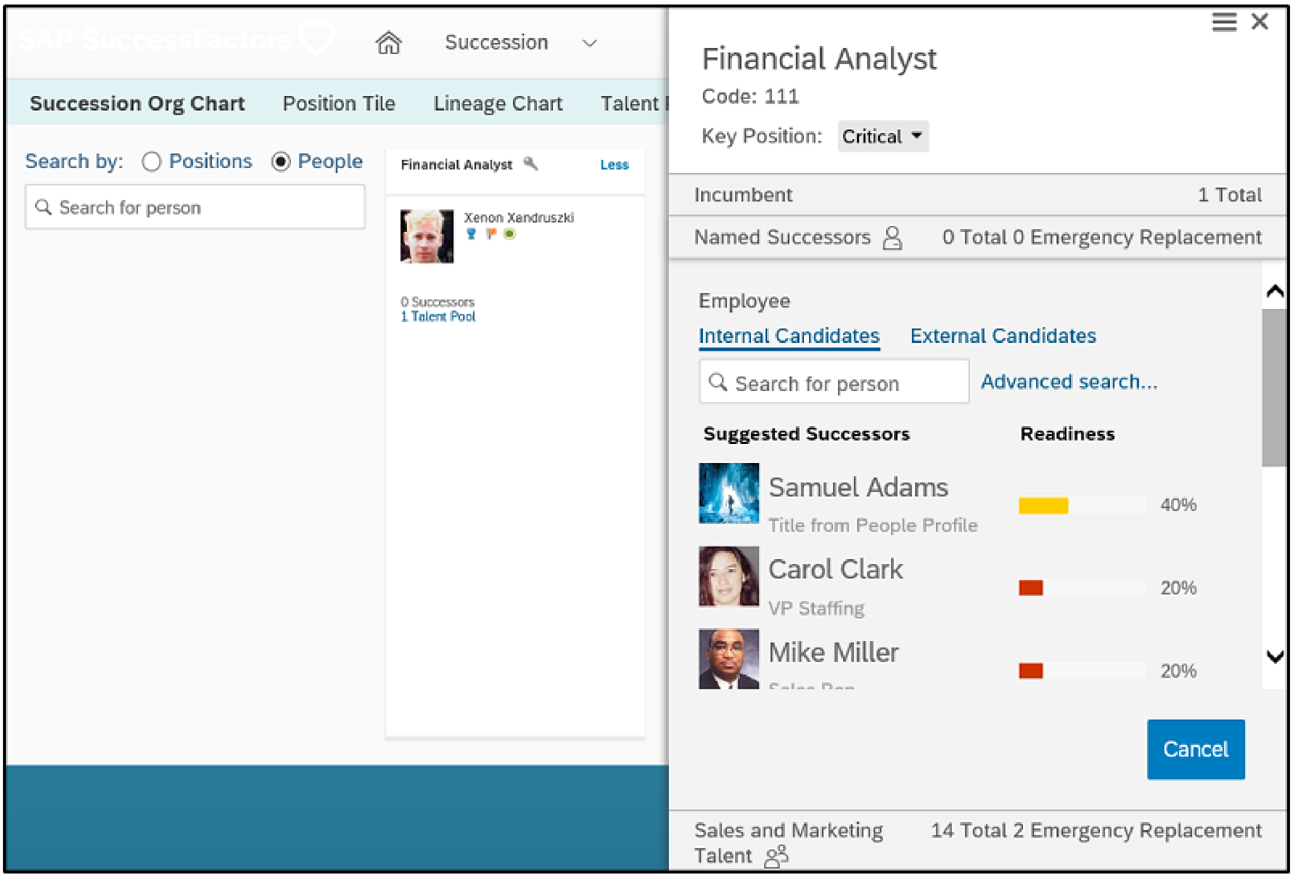
Permission Name	**Area of Control**
Mentoring Programs Access Permission	Grants access to role to utilize or participate in Mentoring programs
Career Development Plan Access Permission	Gives users access to the Development (Home > Development). Additional permissions are required for viewing development plans within Development tab.
Career Worksheet Access Permission	Gives access to the Career Worksheet tab within Development. Additional permissions are required for Worksheets as well.
Career Worksheet Suggested Roles Access Permission	Gives access to the Suggested Role feature of CDP.
Recommended Successors	Grants the ability to see recommended or suggested successors within Succession. Must utilize the competencies and career worksheet in order to for feature to populate.



End User View: Admin Center > Set User Permissions > Manage Permission Roles

💡	Unless you have the Succession module activated by your Professional Services Consultant, you will not see the Recommended Successors.

If Career Development Planning is fully integrated with Succession Management, utilizing the Career Worksheet, and capturing data via the Metadata Framework (MDF), the Recommended Successors permission controls the display of a Suggested Successors within the Succession Org Chart v12 as seen below:



There are also other end-user permissions that are defined in the back-end and that are not defined in RBP. These permissions are coded in the template by the consultants and at this stage are not available in Admin Center. This includes for example, the permission to create or delete a development goal, the permission to make a role public from the Career Worksheet to the profile.

Exercise - Enable End User Permissions for CDP

In this exercise, you will enable the Manage Career Development Permissions for an Administrator role.

1. Use the **Action Search** to find **Manage Permission Roles**.
2. Select the role to modify and then click on the **Permission** button.
3. Scroll until you see the **Career Development Planning** link.
4. Enable all the features available by choosing **Select All** checkbox.
5. Click **Done** and **Save Changes**.
6. Logout and Log back in as the user or proxy from Home menu to Development to see your new permissions in the system.
7. Now, the End User should be able view or participate in using the Career Development Planning tools chosen.

Lesson Conclusion - User Permissions for CDP

In this lesson, you were introduced to Career Development Planning permissions specifically for the End User Role.

Unit Wrap-Up

In this unit, you covered:

- Lesson 2-1: Role-Based Permissions for CDP
- Lesson 2-2: Administrator Permissions for CDP
- Lesson 2-3: User Permissions for CDP

You should now be able to:

- General Permissions Related to Career Development Planning
- Administrator Permissions required to change Career Development Planning
- End User Permissions needed to utilize Career Development Planning

Unit 3 - Development Plan v12 Activities

Unit Objectives

This unit contains three lessons and four exercises:

- Lesson 3-1: Purpose and Permissions of Development Plan v12
- Lesson 3-2: Creating or Copying a Development Plan Template v12
- Lesson 3-3: Modifying a Development Plan v12
- Lesson 3-4: Publishing Development Goals in the Profile

Upon completing this unit, you will be able to:

- Purpose of Development Plan v12
- Permissions for Development Plan v12
- Ways to create a new Development Plan v12
- Modifications of template settings within the Admin Center
- Actions inside the development plan for the End User
- Publish Development Goals in the Profile

Lesson 3-1 - Purpose and Permissions of Development Plan v12

Lesson Overview

The goal for this lesson is to introduce the Development Plan v12 permissions needed for the Administrator and End User roles.

Lesson Objective

- Identify the purpose of a development plan and grant permissions necessary to create or modify the associated template

What is the Purpose of a Development Plan?

The Development Plan component of Career Development Planning (CDP):

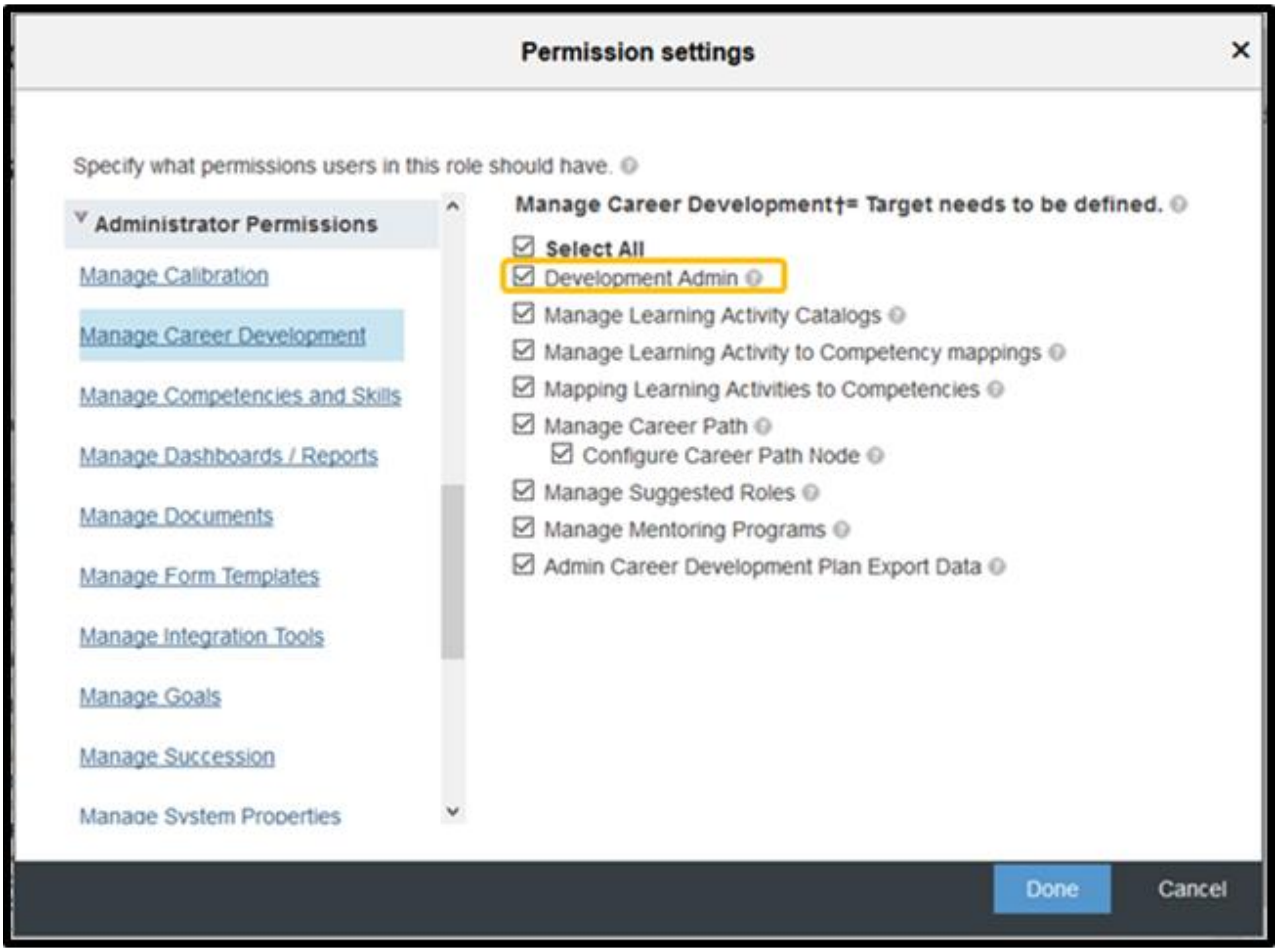
- Enables key players to create actionable plans that address career goals.
- Analyzes progress of the goal or attached learning activity for future employee evaluation.
- Allows users to enter, edit, and track development objectives and learning activities.
- Aids both employees and managers:
    - Employees profit from personal development, career planning, and job satisfaction.

- Managers benefit from having standardized methods for monitoring employees.

What Permissions are Necessary to Create or Modify a Development Plan Template?

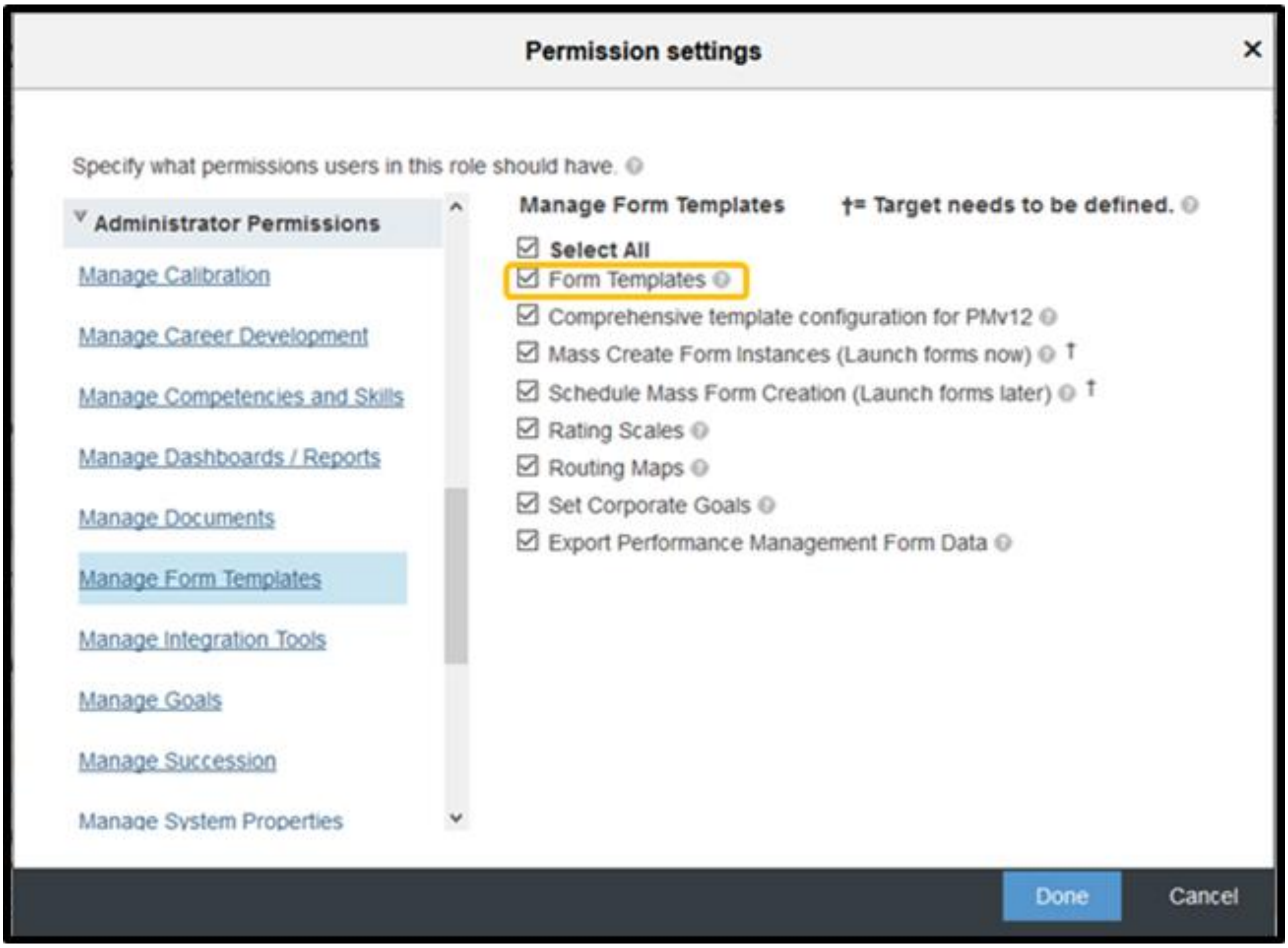
As previously discussed in Unit 2, utilize the **Action Search** to locate **Manage Permission Roles** to make changes or modifications. There are several permissions specifically needed when attempting to create or modify any development plan template through Admin Center.

An Administrator role must have access to the **Development Admin** permission located in the Manage Career Development section like below:



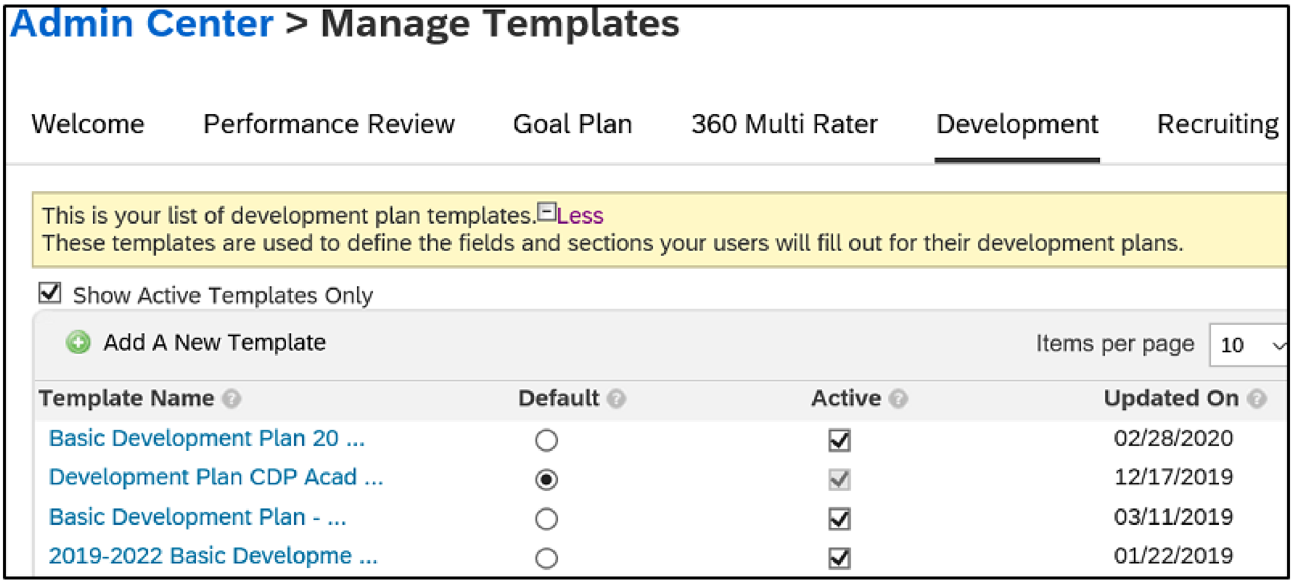
Administrator View: Admin Center > Set User Permissions > Manage Permission Roles

And, you will need access to the **Manage Form Templates** section within Admin Center to enable this permission called **Form Templates** controls the visibility of manage templates within Admin Center.



Administrator View: Admin Center > Set User Permissions > Manage Permission Roles.

Once you have granted these permissions to the intended Administrator, the **Manage Templates** option located in **Admin Center** will be displayed.

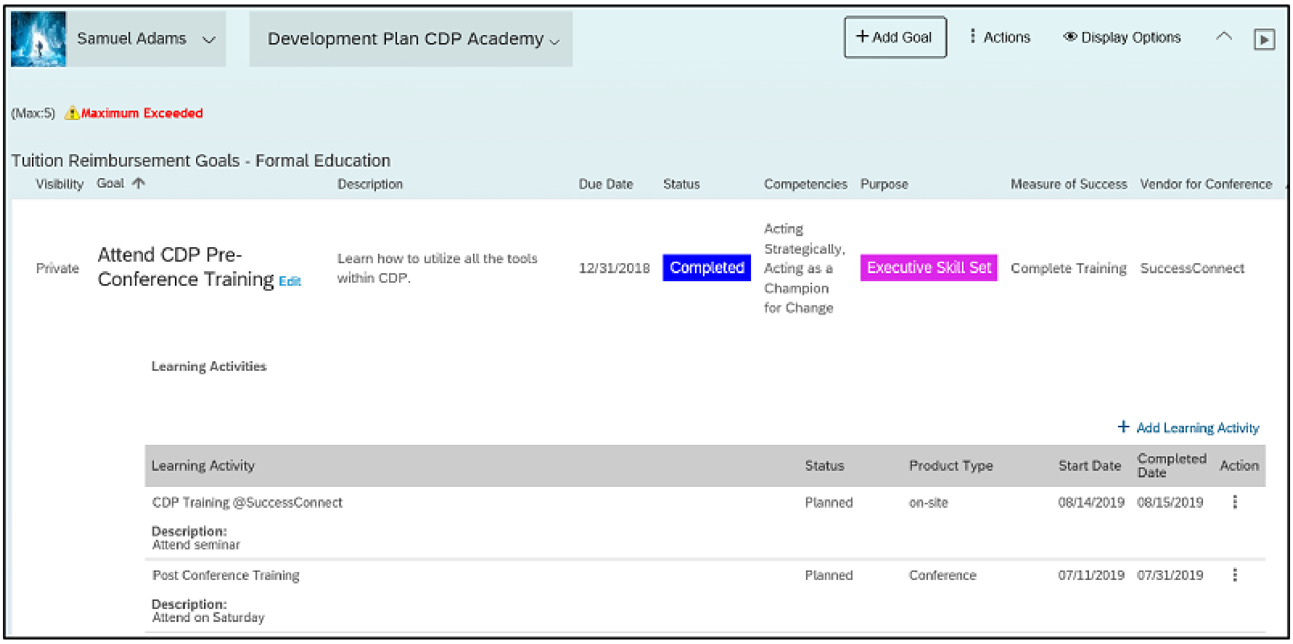


Administrator View: Admin Center > Development > Manage Templates. Choose Development option.

Inside the Development tab, one or more templates may display depending on the number of active or previous changes. It is best practice to create or modify a new development template every 3-5 years. Since career development often requires accumulation of new skills or competencies which may take some time, a development template is updated less frequently than a goal management template. The frequency of changes to the template may also depend on your culture or talent management strategy.

Options	Actions
Show Active Templates Only	If checked, only active templates display in this area of Admin Center. If unchecked, all templates display (active or not).
Default	Sets the default plan for end users when the login to Development.
Active	Allows the template to display to the end user in the dropdown on the Development Plan page.
Updated On	Date the template was last updated.
Date Range	Date range defined in the plan.
Sort Order	Controls the order that the plan(s) show up in the user's dropdown list.

Most of the options located in Admin Center effect the dropdown highlighted or features displaying within the end user view. The main end user in the Career Development Planning module is typically the Employee. Other end users could be the Manager, Director or Human Resources Professionals. When using learning activities, the end user will see the + Add Learning Activity option within the Development Plan as seen here:



End User View: Home > Development > Development Plan

Exercise - Change Default Development Plan v12 Template in Admin Center

In this exercise, you will change the default option in Admin Center to see how this impacts the end user.

1. Using the Action Search, locate **Manage Templates and then Development**.
2. Select the radio button next to a new template and **OK** to save the option.
3. Logout and Log back in as the user with correct permission to see your changes in the system.
4. Now, you should be able to see the new template as the first name listed in the dropdown when navigating to **Home > Development > Development Plan tab.**

This guide discusses changes available to the Administrator in Admin Center. It does not address permissions located inside the template or how to make changes to the development plan template XML. These types of changes must be addressed by a Professional Services Consultant or Customer Support.

Lesson Conclusion - Purpose and Permissions of Development Plan v12

In this lesson, you were introduced to Development Plan v12 purpose and to the permission needed for the Administrator to manage the development plan templates.

Lesson 3-2 - Creating or Copying a Development Plan Template v12

Lesson Overview

The goal for this lesson is to create a new plan or copy from an existing Development Plan.

Lesson Objective

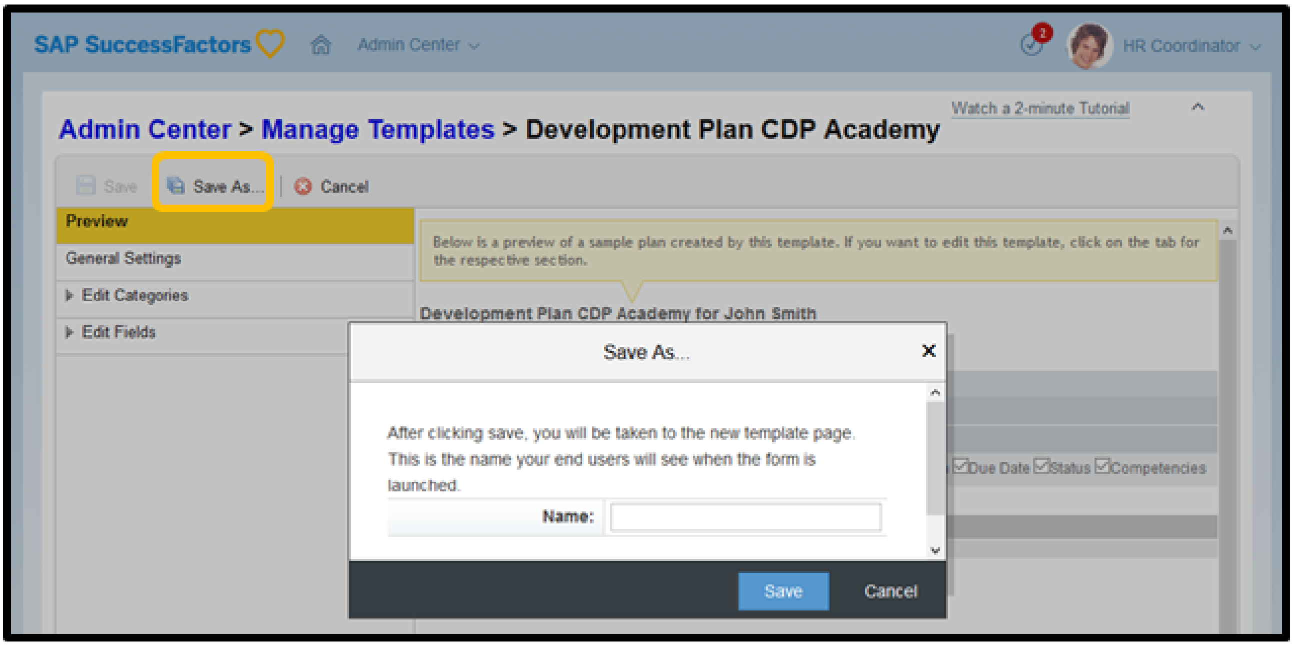
- Discuss the steps need to create a new development plan or copy from an existing development plan template

How do I create a New Development Plan v12 Template?

To create a new template, simply click the **Add a New Template** button and select the desired template for the SuccessStore. Save the template name with the year to assist in future updates.

Copying a Development Template

If you would like to copy an existing template, click on the template name within the Development tab. You make a copy of a template by clicking the **Save As** button as seen in screenshot below:



Administrator View: Admin Center > Development > Manage Templates. Click on Development, Template Name and Save As.

Give the template a unique or updated name and then make any desired changes to the template. As you complete this action, your template name updates.

This action takes you into the editable template which allows you to make changes to the general settings or other features.

Exercise - Create a new Development Plan v12 Template in Admin Center

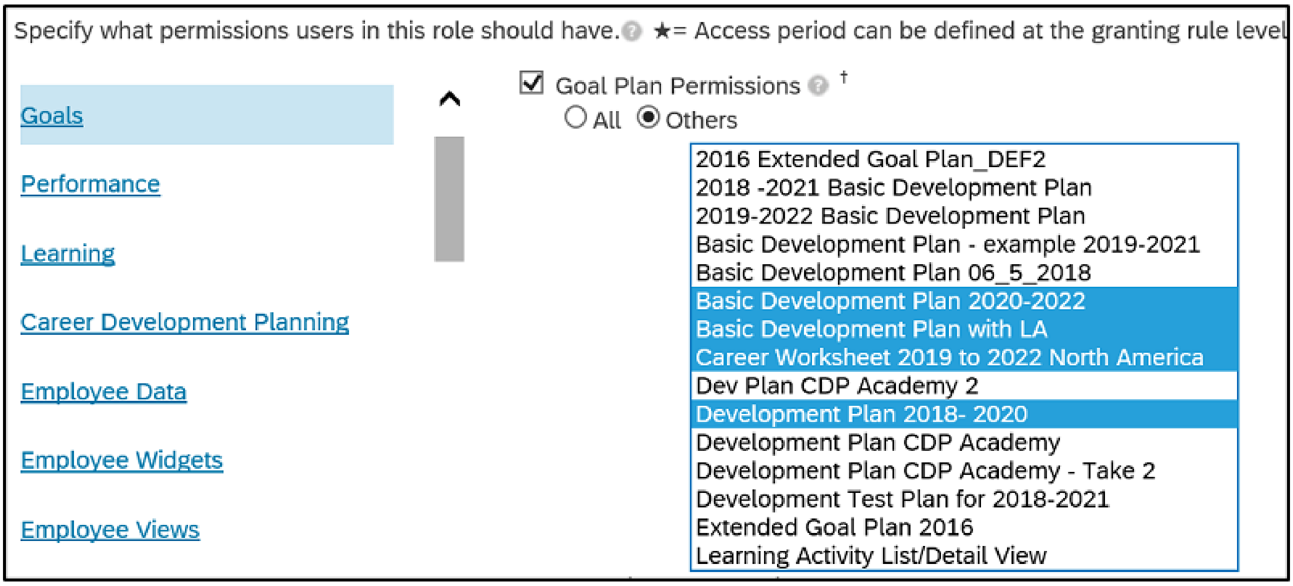
In this exercise, you will Create a new Development Plan v12 Template in Admin Center.

1. Using the Action Search, locate **Manage Templates and Development**.
2. Select **Add a New Template** and choose one from the SuccessStore.
3. Click **Add to my instance** and provide a name for the template.
4. **Save** the new development plan template.
5. Continue making the desired changes to the template and **Save** again when finished.

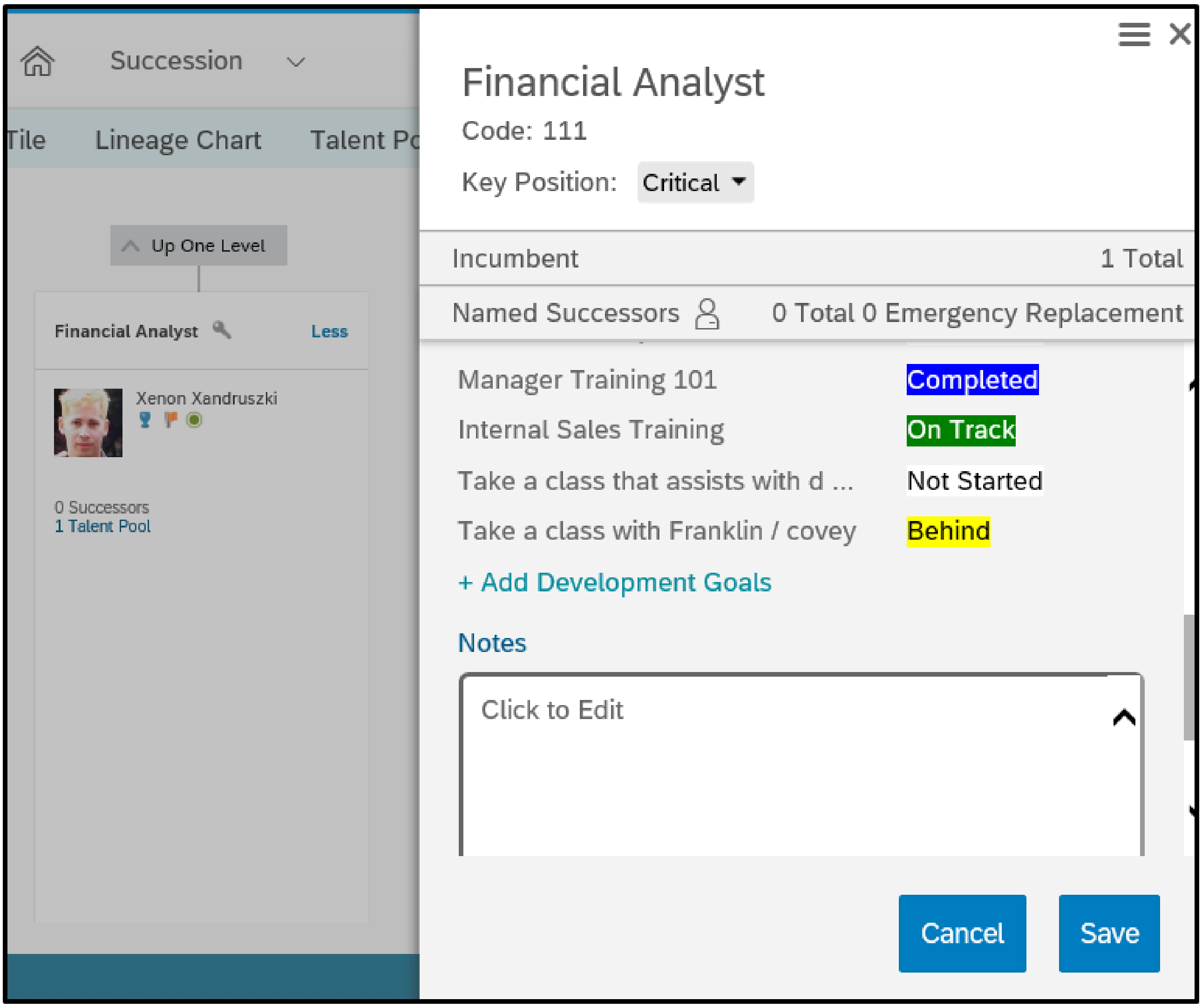
This concludes Exercise: Creating a New Development Plan v12 Template in Admin Center.

Important Notes:

If having difficulty viewing or seeing a new template, be sure to check Admin Center > Set User Permissions>Manage Permission Roles to see if you gave permission to the template itself within the Goals area noted. This section is shared between Goal Management and Career Development Planning. So, you will need to specify which templates per role to access. In order to select multiple templates, simply hold the control key down to highlight and click done:



Also, with full integration of CDP and Succession, development goals can be seen or even created from the Add Successor area of the Succession Org Chart like below:



Lesson Conclusion - Creating or Copying a Development Plan Template v12

In this lesson, you were introduced to create a new plan or copy from an existing Development Plan.

Lesson 3-3 - Modifying a Development Plan v12

Lesson Overview

The goal for this lesson is to modify a development plan in Admin Center.

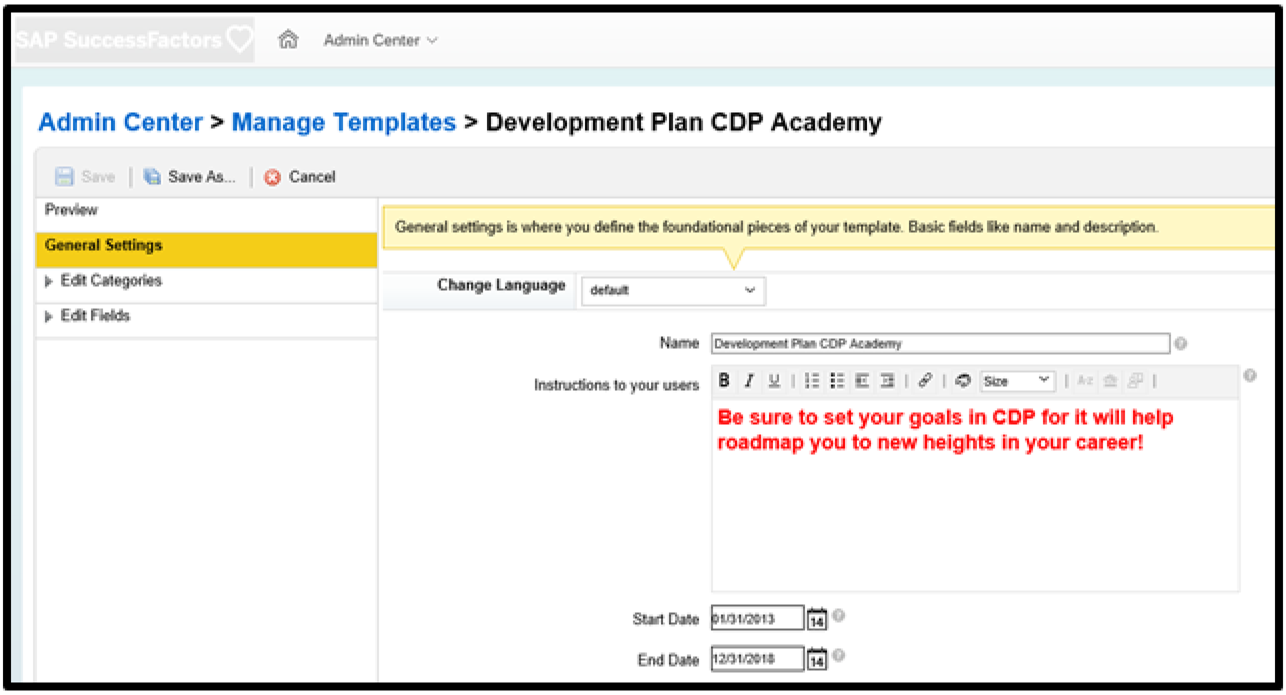
Lesson Objective

- Discuss the steps needed to change an existing development plan template

How to Edit General Settings for a Development Plan v12 Template?

Some general settings may be modified within the Admin Center. While others must be updated by your Professional Services Consultant. The Administrator is allowed to update the following **General Settings** of a Development Plan Template within **Admin Center:**

- Edit the Name of the Development Plan
- Enter specific instructions to appear at the top of the Development Plan
- Use the rich-text editor to change font size, color, style, or add a link to an external website
- Enter Start and End Dates (these are the dates that will default for all goals added to the plan)
- Change the language (if applicable) and enter appropriate language text



Administrator View: Admin Center > Development > Manage Templates.

General Settings Modified by Professional Services or Customer Success

There are several other settings in General Settings that are only visible in the XML representation of development plan templates. Help from Professional Services Consultants or Customer Success will be needed to make these changes within the XML code. Consultants generally capture this information as part of the implementation process. It is important to have this information well before your system goes live and to work with your consulting partner to make sure you understand the available options so you can make the best choices for your organization.

	Configuration guides or documents are typically presented during or at the “go live” of the implementation project. If you do not have these items, contact your Professional Services consultant. In addition, it is the responsibility of the customer or Administrator of the system to update the configuration guides as changes are made moving forward.

Some examples of attributes only available via XML modification are listed below. This list is not exhaustive so you should work with your consulting partner to make sure all options are explained. Several options are similar to options used in Business Goal Plans but some of them are not utilized in Development Goal Plans. For example cascading of goals is not supported with Development Goal Plans.

XML Options & Descriptions (Partial List):

spellchk	This option (called an attribute in XML terms) adds spell check functionality to a development plan field when the option is set to true.
instructions-viewdefault	Instructions for a development plan will be visible by default if this option is set to true.
alerts-viewdefault	Alerts for a development plan will be visible by default if this option is set to true.
new-obj-share-status-public	When set to true, a newly created goal will appear as a public goal. When set to false, a newly created goal will appear as a private goal.
use-text-for-privacy	This attribute allows users to view their privacy flag (Public/Private) goals as text on the goal plan page instead of the sun glasses icon.
max-goals	This attribute defines the maximum number of goals for a goal plan. If the number of goals exceeds the max-goals value, a warning will be displayed.
min-goals	This attribute defines the minimum number of goals for a goal plan. If the number of goals is lower than the min-goals value, a warning will be displayed.

Editing Other Categories in Admin Center

In addition to modifications to the General Settings, it is possible to add or delete categories and fields in the development plan template. However, these options are limited to the original configurations set up during implementation unless the XML has been modified by a Professional Services Consultant or a Customer Success request.

Exercise - Modify General Settings to a Development Plan v12 Template in Admin Center

In this exercise, you will change the instructions and the start/end dates in Admin Center.

1. Using the Action Search, locate **Manage Templates** and click development.
2. Select the name of the template you would like to modify. This should open into an editable mode.
3. Click **General Settings** to view the instructions, start date and end date.
4. Enter the desired text in the **Instructions to your users** area.
5. Place new dates in the **Start Date** and **End Date** fields.
6. When finished, **Save** the modified development plan template.
7. To view your changes, log out and log back in as an end user with appropriate permissions
8. Navigate from **Home** to **Development > Development Plan** tab.

	If you cannot see your new or modified template, be sure to check your set up in **Admin Center > Set User Permissions > Manage Permission Roles** by granting permission to the template under **Goals > Goal Plan Permissions**. Your template must be highlighted or selected.

This concludes Exercise: Modifying General Settings to Development Plan v12 Template

Exercise - Utilize Goal Notifications with the Development Plan v12 Changes

In this exercise, you will enable and modify the settings of the Goal Notifications. The purpose of these notifications is to communicate when changes are made to development goals within the Development Plan. Below is a list of what triggers a notification and who receives a response:

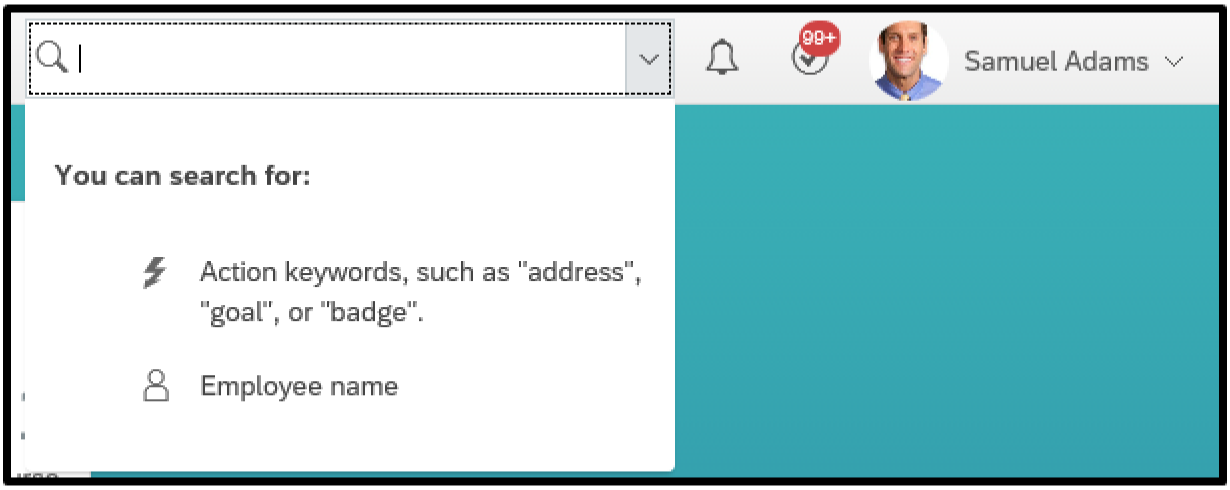
Notification	Trigger	Recipient
Goal Creation Notification	Sent when a new goal is created (by someone other than the goal plan owner)	User for whom the objective was created (for example an employee who had an objective created by that employee's manager)
Goal Deletion Notification	Sent when a goal is deleted from a user's goal plan (by	User of the affected goal plan

Notification	Trigger	Recipient
	someone other than the goal plan owner)	
Goal Modification Notification (daily)	Sent daily when a goal has been modified within the past 24 hours (by someone other than the goal owner)	User for whom the objective was modified

	Goal Notifications are shared between the Goal Management Module and the Career Development Planning Module. Keep in mind that any configurations will be implemented in both modules.

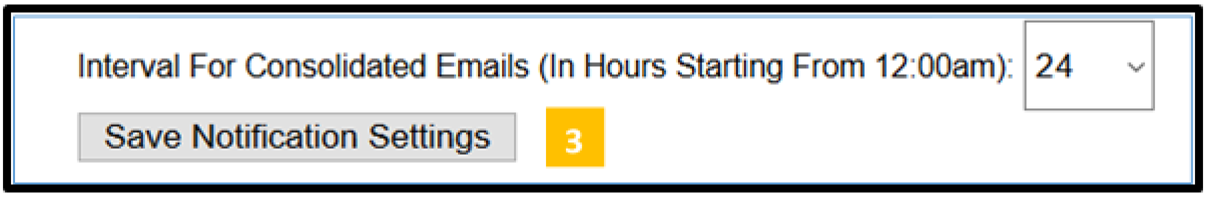
To enable goal notifications:

1. Using Action Search, locate **E-Mail Notification Templates Settings**.



2. Select the checkboxes of the desired notifications.

3. Click **Save Notification Settings**.



To edit the text or setting of the notifications:

1. Click the appropriate notification link
2. Select or edit preferred options
    - You may select the High Priority check box
    - Be sure to select the **Private** checkbox in addition to public goal, since most development goals will be private
    - Use the **Customize Settings for Goal Plans** link to select the Goal Plans to be affected by the notification settings
3. Edit the email subject and body as desired
4. Click **Save Changes**

This concludes the lessons and exercises in Unit 3.

Lesson Conclusion - Modifying a Development Plan v12

In this lesson, you were introduced to modify a development plan in Admin Center.

Lesson 3-4 - Publishing Development Goals in the Profile

Lesson Overview

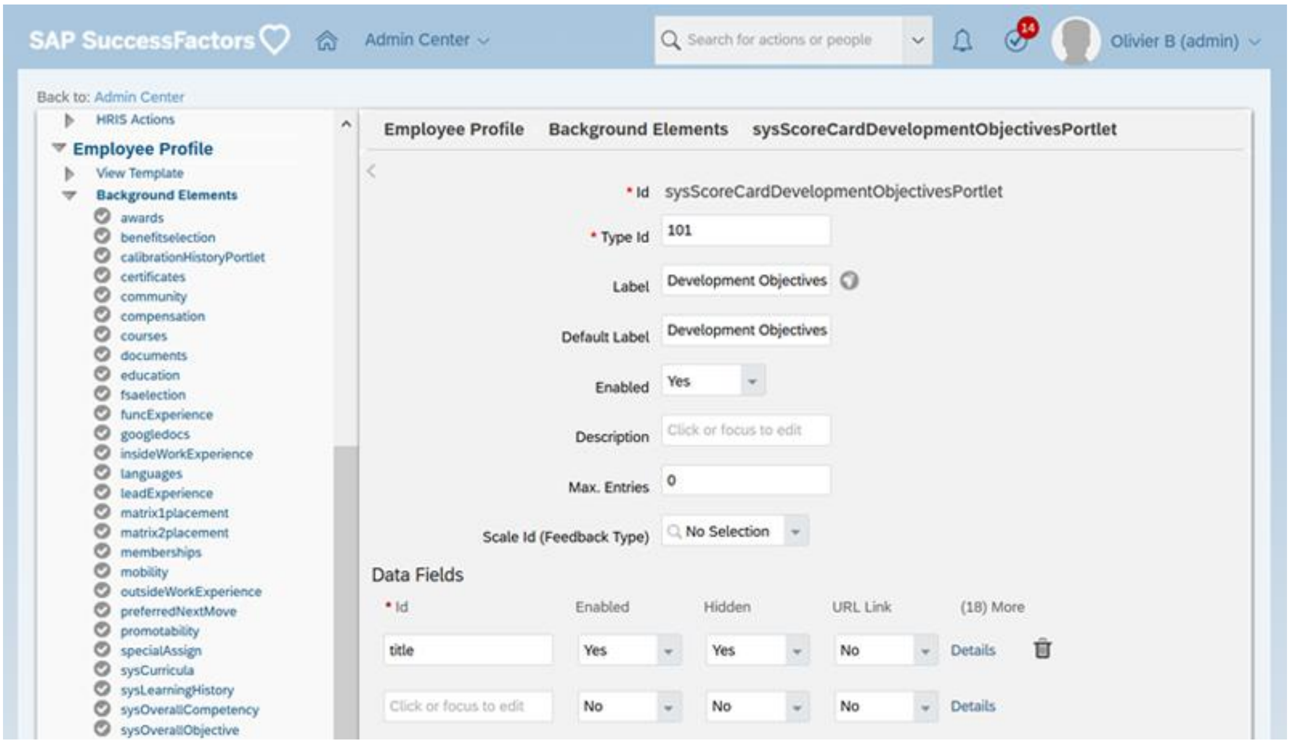
The goal for this lesson is to publish development goals from the plan to the profile.

Lesson Objective

- Publish development goals to the profile

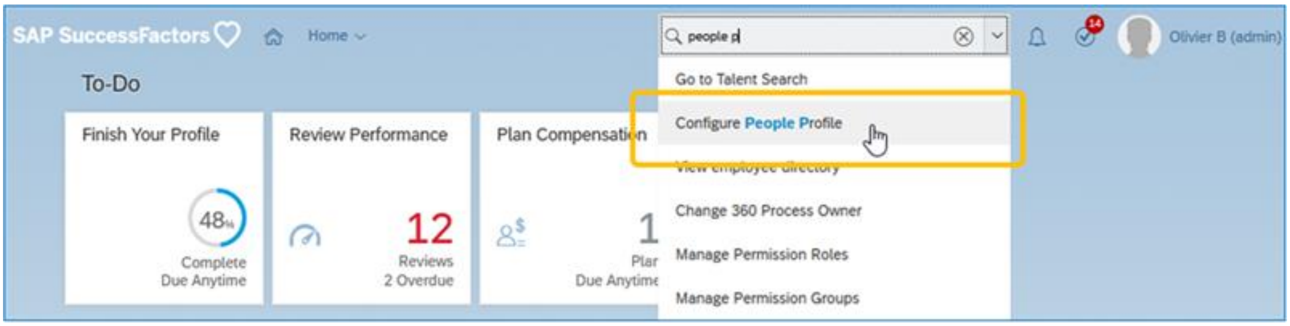
The Development Goals Portlet

In order to use the Development Goals portlet in the profile, the corresponding background element code sysScoreCardDevelopmentObjectivesPortlet has to be configured in the Succession Data Model. You can work on this aspect with your configuration consultant or with Manage Business Configuration from the Action Search.

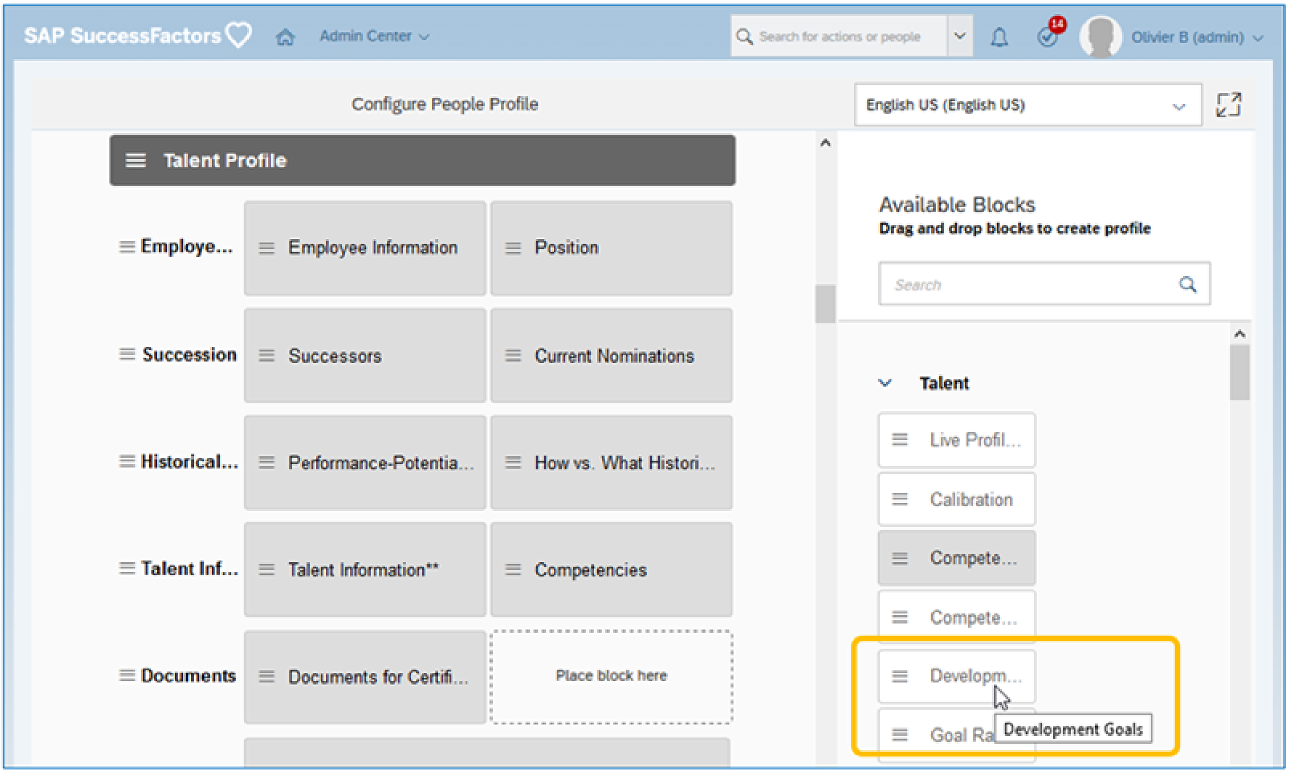


The field title is required.

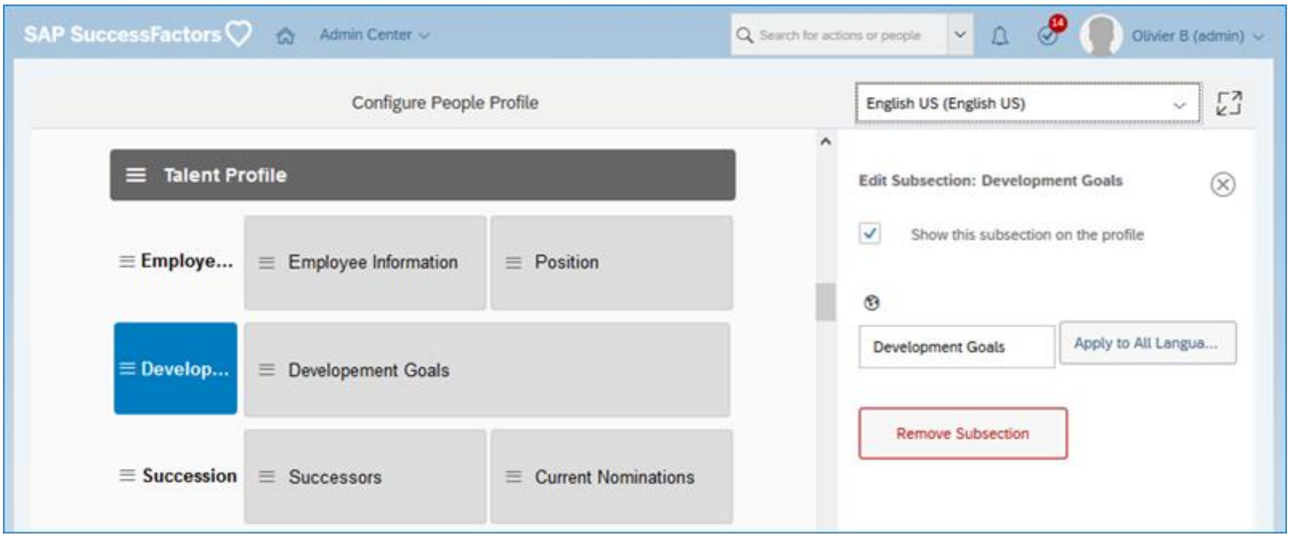
Once the portlet exists in the Succession Data Model, you can go to the Action Search and navigate to Configuration People Profile.



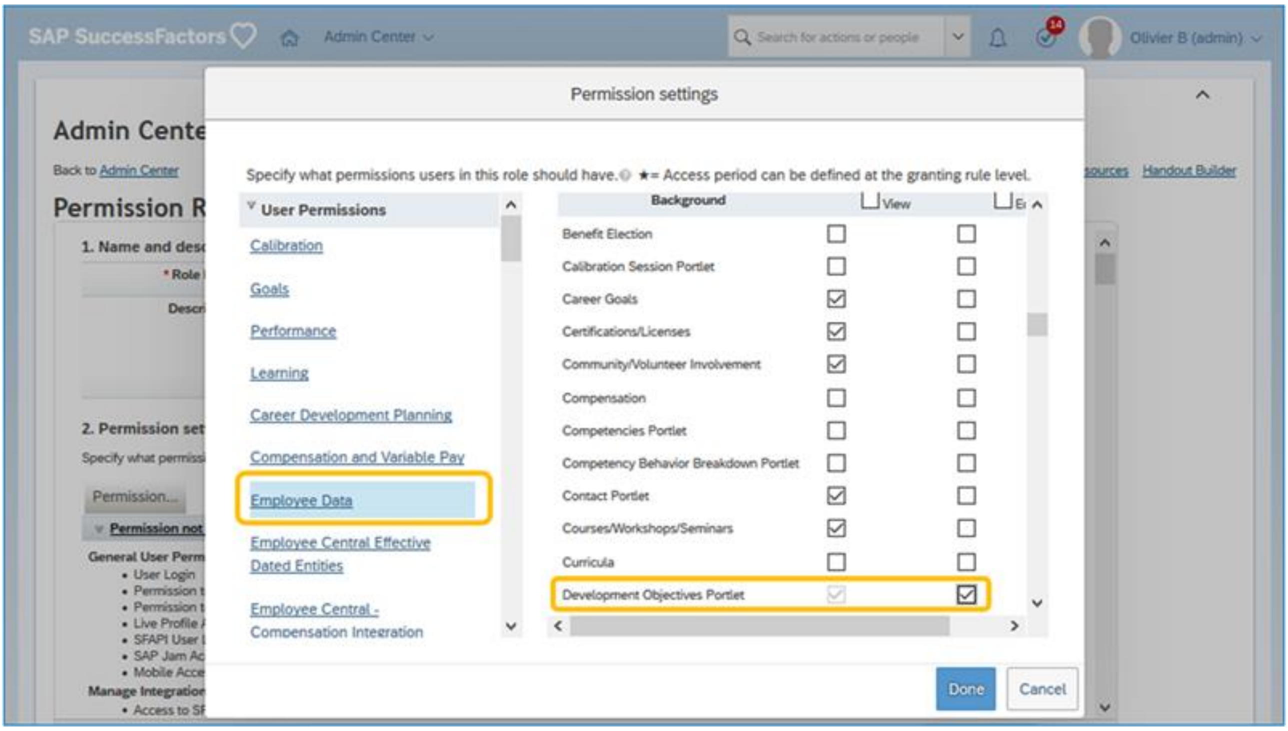
The Development Goals block is available under the Talent section.



You can drag and drop this block where it makes sense in the profile. You can also enlarge this portlet and rename the subsection. Save the modifications you made in Configure People Profile.

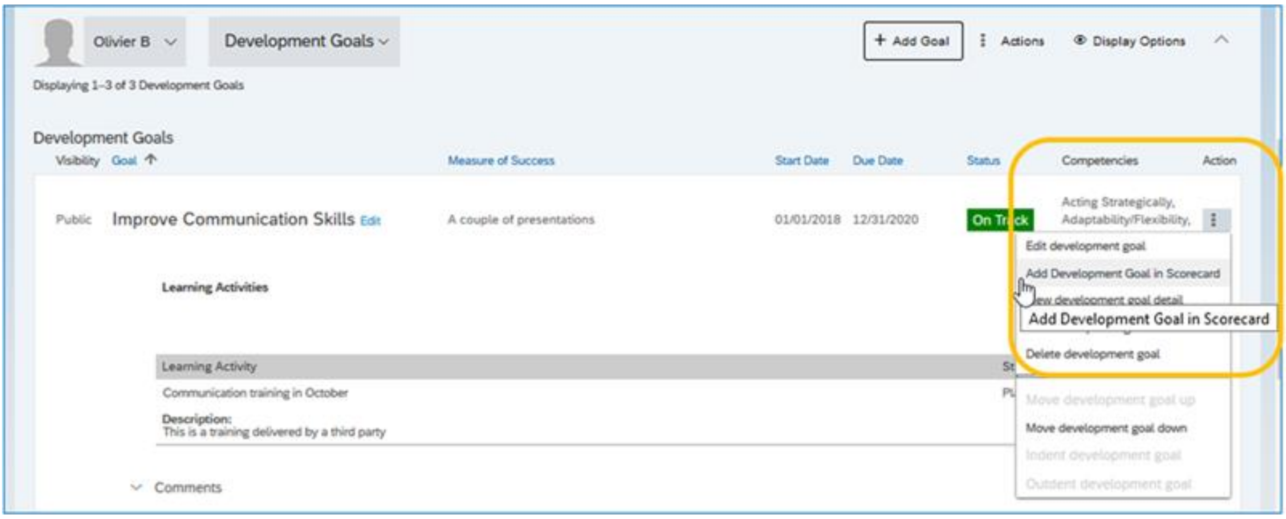


As any newly created portlets, the permissions in RBP have to be updated. From the Action Search, go to Manage Permission Roles. Select the roles that should be able to use the Development Goals portlet. Under the User Permission, the Development Goal Portlet is found in the backgrounds for the category Employee Data. Save the modified permissions.



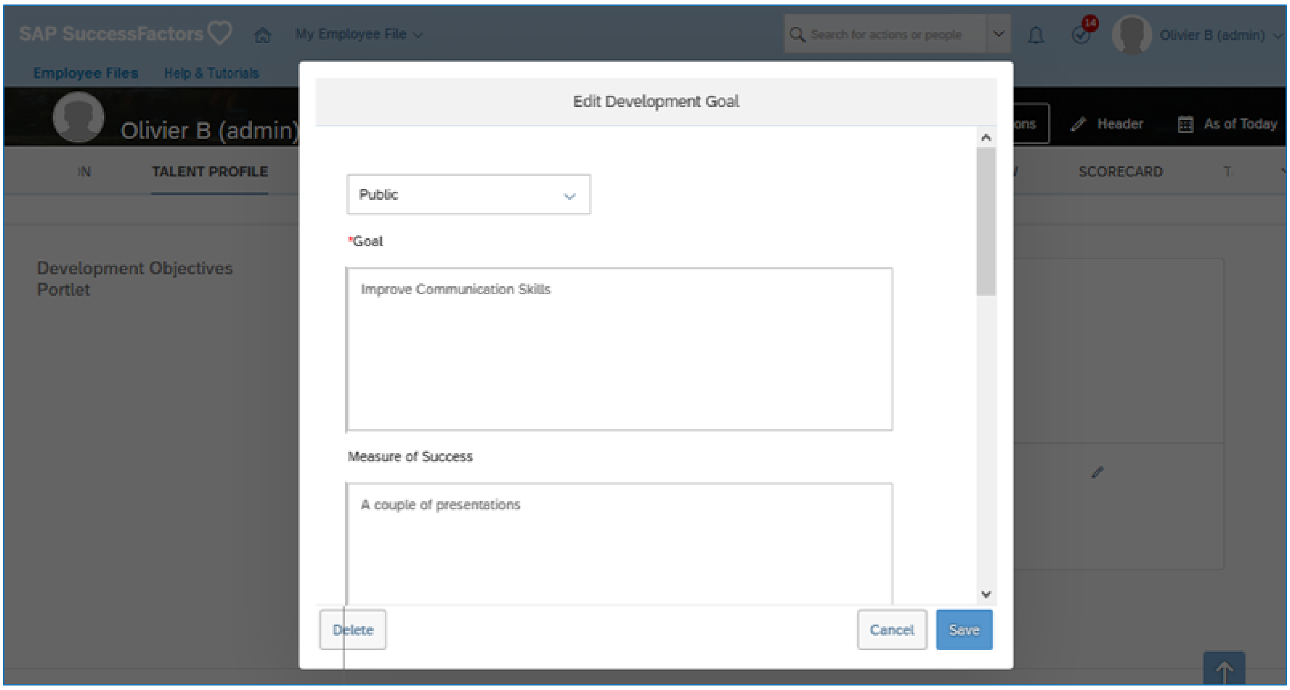
Publish the Development Goals Manually or By Default

From the goal action menu icon in the development plan, end users will be able to select the goals the want to see in the Development Goals portlet in the profile. They will click on the action Add Development Goal in Scorecard. A pop up message will ask them if they are sure that they want to add this Development Goal in the Scorecard and they can either click on OK or Cancel. If they select OK, the Goal is add in the profile portlet.



Once a goal is added to the profile, users can still remove it using once again the action icon from the Development Goal in the Plan, this time selecting Remove Development Goal from Scorecard.

Published goals in the profile can be edited or deleted from the profile itself for the users who have the permission from the Development Plan xml.



There is also an option to make sure that all development goals are published to the profile by default adding a switch in the development plan xml. You can work with your implementation consultant if you think that this will be an interesting configuration option for your organization.

Lesson Conclusion - Publishing Development Goals in the Profile

In this lesson, you were introduced to Development Goals Portlet and the two options to publish development goals in the profile.

Unit Wrap-Up

In this unit, you covered:

- Lesson 3-1: Purpose and Permissions of Development Plan v12
- Lesson 3-2: Creating or Copying a Development Plan Template v12
- Lesson 3-3: Modifying a Development Plan v12
- Lesson 3-4: Publishing Development Goals in the Profile

You should now be able to:

- Purpose of Development Plan v12
- Permissions for Development Plan v12
- Ways to create a new Development Plan v12
- Modifications of template settings within the Admin Center
- Actions inside the development plan for the End User
- Publish Development Goals in the Profile

Unit 4 - Career Worksheet v12

Unit Objectives

This unit contains two general lesson and three exercises:

- Lesson 4-1: Purpose, Permissions and Features of Career Worksheet v12
- Lesson 4-2: Creating or Updating the Career Worksheet v12

Upon completing this unit, you will be able to:

- Purpose of Career Worksheet v12
- Permissions for Career Worksheet v12
- Understanding features of a Career Worksheet v12
- Modifications to options and settings in Admin Center

Lesson 4-1 - Purpose, Permissions and Features of Career Worksheet v12

Lesson Overview

The goal for this lesson is to introduce the Career Worksheet v12 permissions needed for the Administrator and End User roles.

Lesson Objective

- Identify the purpose of a career worksheet and grant permissions necessary to view the associated template

What is the Purpose of a Career Worksheet?

The Career Worksheet is a planning tool for users as they work on CDP tasks.

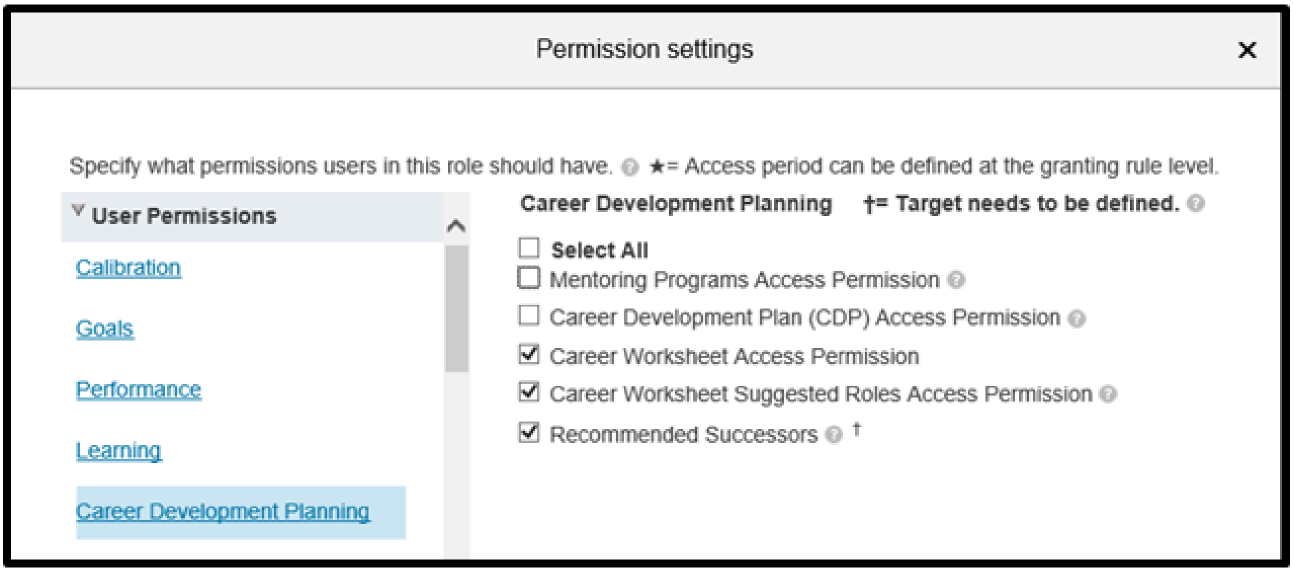
- Allows users to view job roles and gain understanding of the development effort required to move into a future role.
- Shows the job code, description, and competencies required (as defined in Families & Roles) for the current role as well as future roles.
- Displays a gap analysis for each competency, comparing the last rating of record recorded for the employee with the expected rating for that role.
- Reveals the role readiness of the employee by comparing the needed competencies to those currently possessed by the employee.

How can Administrators Change the Features of Career Worksheet v12?

- The Career Worksheet is an XML-based template, similar to the Development Plan. Configuration is completed solely via XML.
- You must contact your Professional Services Consultant for major changes to the Career Worksheet or Customer Success for minor changes.
- The Administrator only has access to modify the permissions in RBP, the settings in Manage Suggested Roles and Manage Job Roles, and the actions for the Role-Readiness Form.

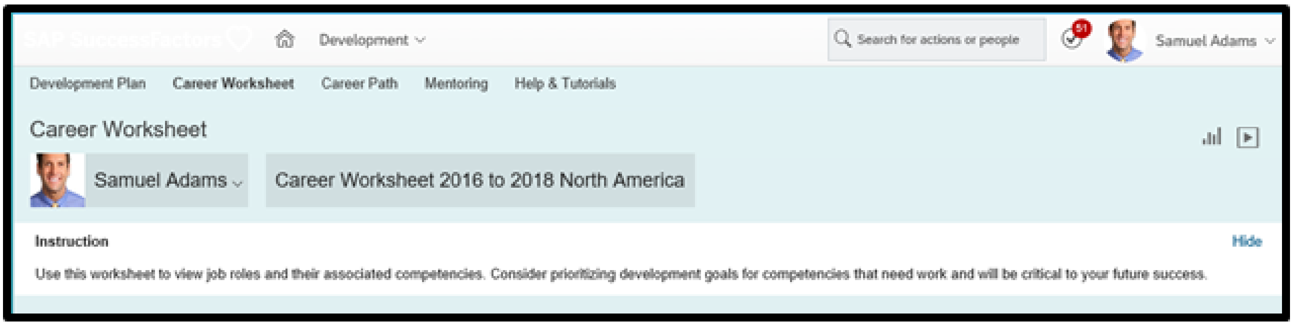
What Permissions Specifically Apply to the Career Worksheet v12?

In order to access the Career Worksheet, an End User must first have the ability to see the **Development** option from the **Home** navigation dropdown. The permission that controls this access is called **Career Development Plan (CDP) Access Permission** as seen below.



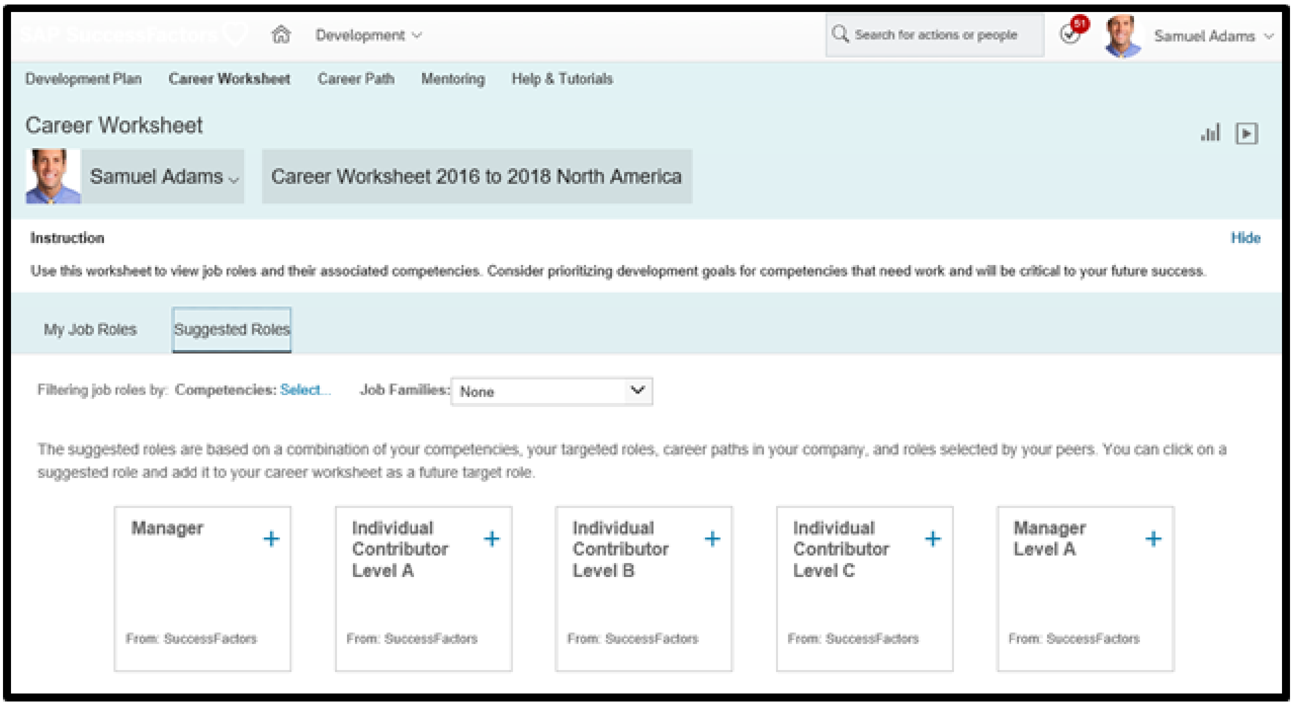
Admin Center > Set User Permissions > Manage Permissions Roles

The Career Worksheet has two specific permissions listed. The **Career Worksheet Access Permission** grants the ability to view or perform activities within the worksheet.



End User View: Home > Development > Career Worksheet

Whereas the **Career Worksheet Suggested Roles Access Permission** allows the end user to see the **Suggested Roles** within the Career Worksheet after the proper configurations are set.



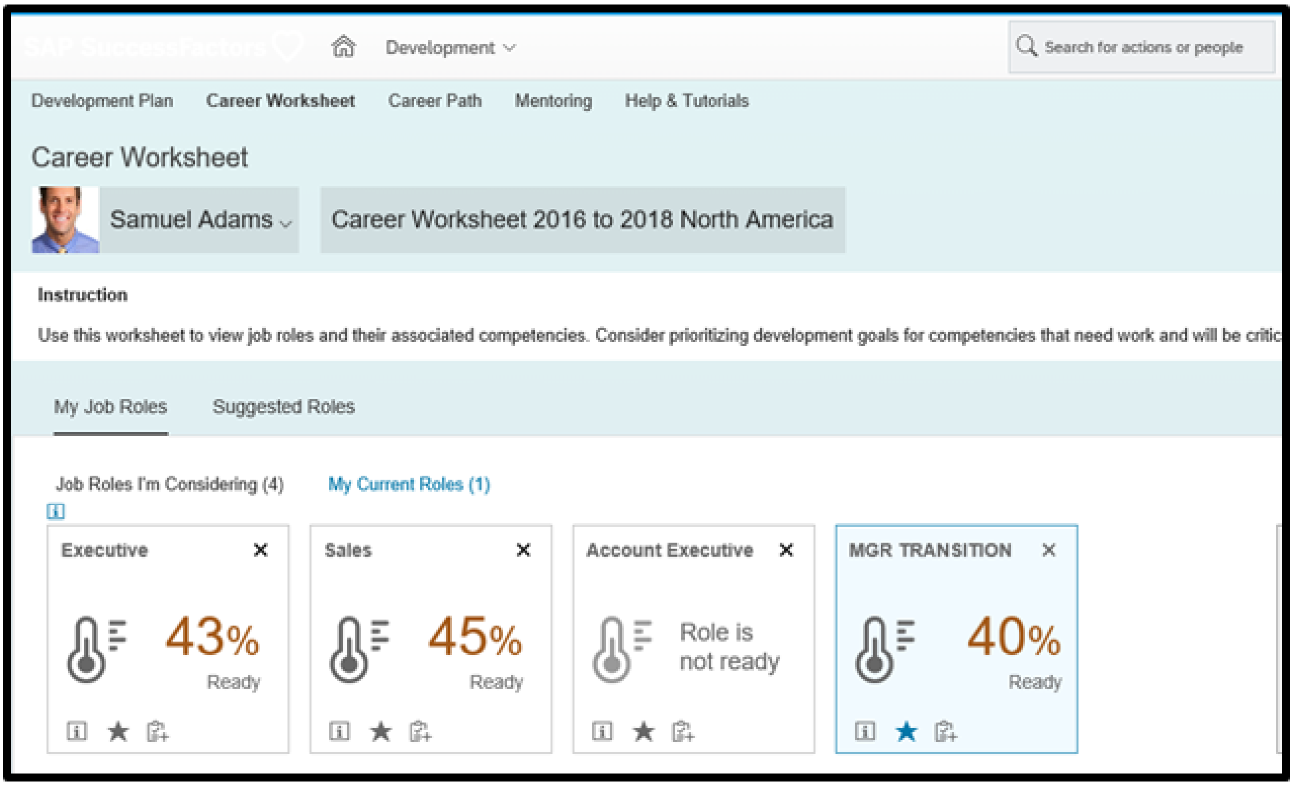
End User View: Suggested Roles located within Home > Development > Career Worksheet

With all of the appropriate permissions granted, you can now access the Career Worksheet by selecting Development from the main navigation dropdown and then click on Career Worksheet tab. One important note: You must have permissions to access the Development Plan in addition to the Career Worksheet to navigate via the dropdown.

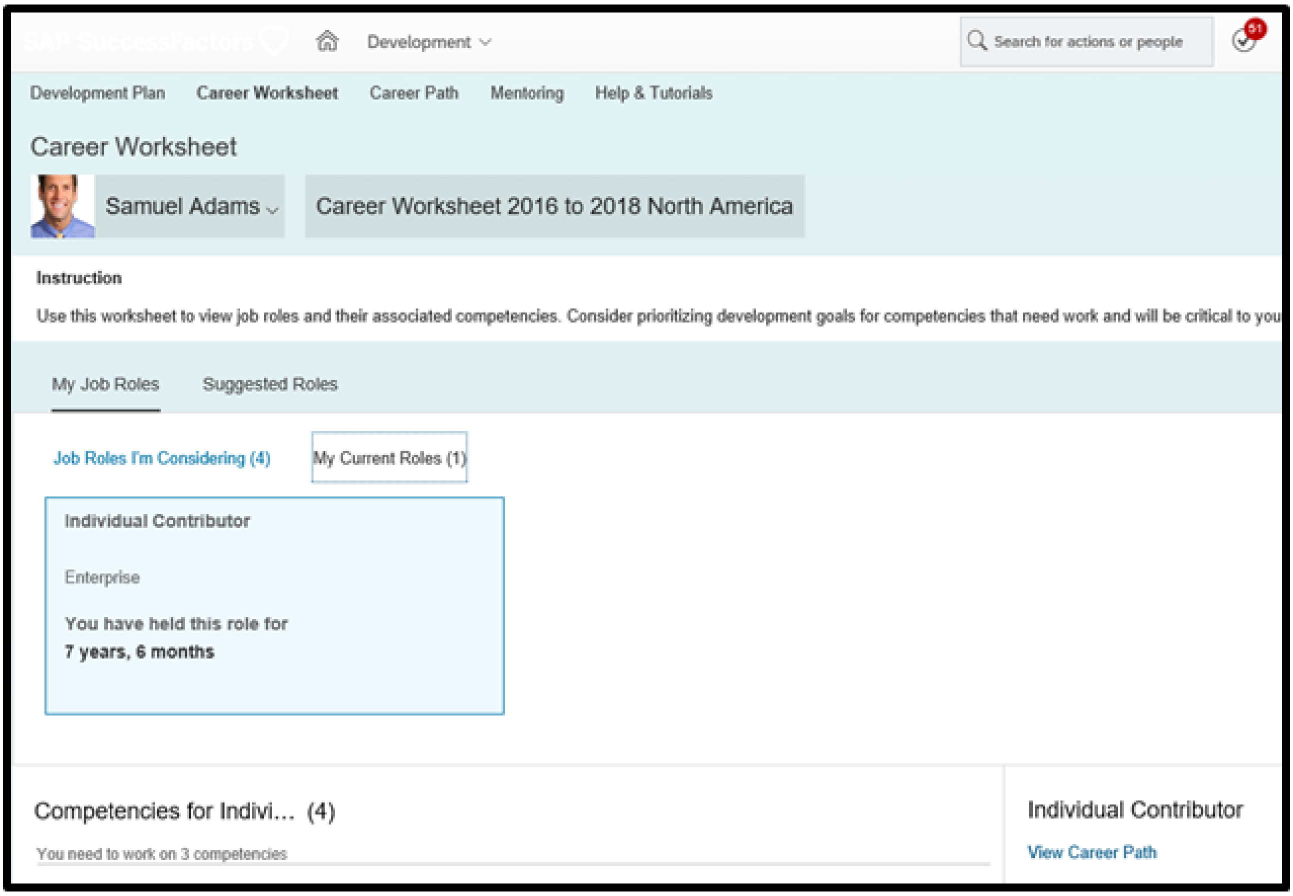
Depending on the configuration of the Career Worksheet template, the look may vary based on activated features. Typical features to include or permission are as follows: My Job Roles, Suggested Roles, Role-Readiness Meter and the Competency Gap Graph.

Features of the Career Worksheet v12

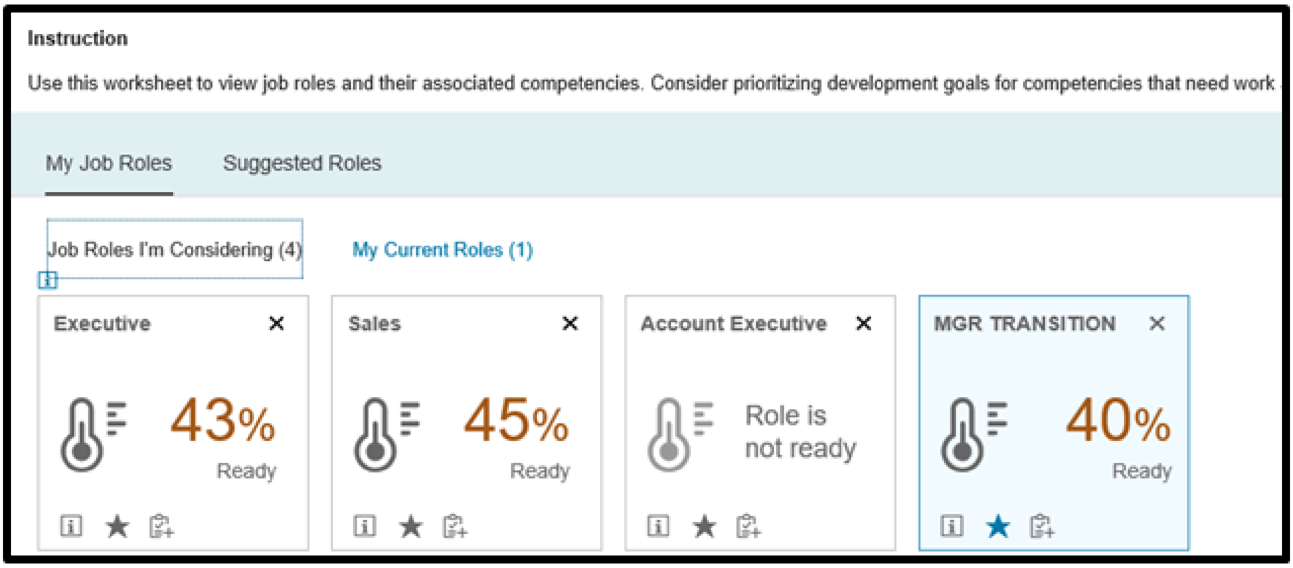
Inside of the Career Worksheet, you can access many features. Below is a screenshot highlighting **My Job Roles** to include the current role of the employee and job roles the employee is considering.



My Current Roles and the competencies are populated via an import or options within Admin Center.

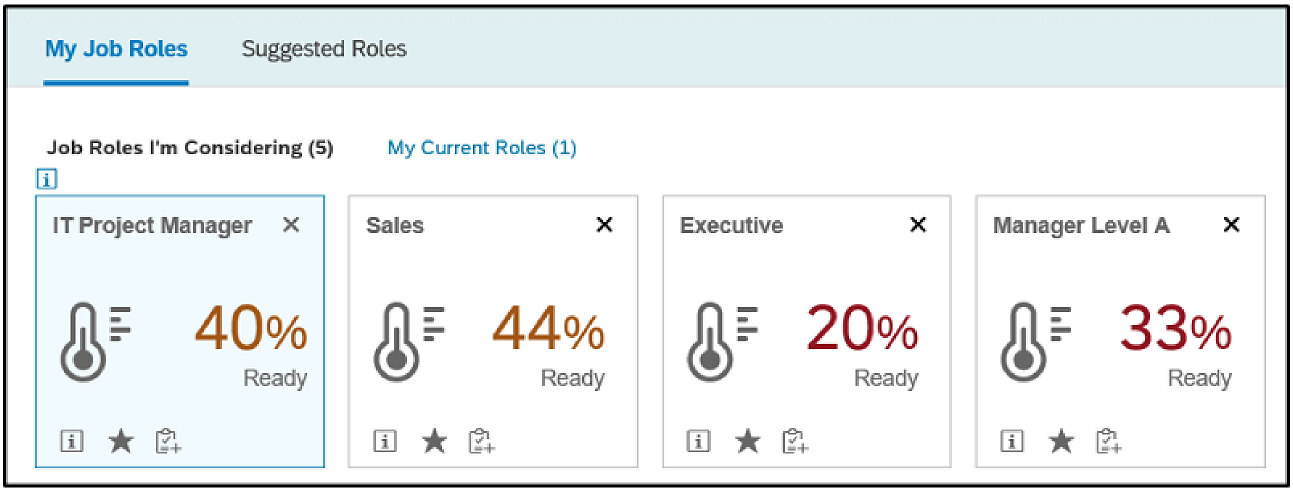


Job Roles I'm Considering can be added several ways. One way is by browsing the job roles using a search box like the one highlighted below. Another way is through the **Suggested Roles** section.



Role-Readiness Meter

When you add the suggested or future role to the career worksheet, the competencies and information associated with that role in Admin Center > Company Settings > Manage Job Roles will populate the **Job Roles I'm Considering** section. Once this action is completed, the Role-Readiness meter will automatically calculate the percentage of competencies met if the necessary data was previously captured in the role-readiness or PM form. Then, the Role Readiness Meter is calculated based on the number of competencies needed for the role versus the competencies the employee currently holds. In order to fully utilize the Role-Readiness Meter, you must also populate the competency gap graph.



The readiness value is calculated as A/B, where:

A =	Number of competencies I have been rated on and where my rating meets or exceeds the expected rating for the target role
B =	Number of competencies required for the target role

The target role requires six competencies, all with an expected rating of 3 (50%). The user was rated a 5 (out of 5) on two out of the six competencies. Competencies that have not been rated do not satisfy the readiness requirement. Based upon the readiness value calculation, the user is 2/6, or 33%, ready for the target role. If a user does not have ratings for any of the competencies required by the target role, the readiness rating cannot be calculated and will show as "?".

Additional Calculation Option for Career Role Readiness

Customers can choose a proportional calculation in which each competency rating is weighted as a percentage of the expected rating. A role readiness score calculated proportionally could more accurately show how close a user is to full readiness for a role.

To select this calculation option, a switch has to be included in the Career Worksheet xml template configuration by the consultant in the back-end of the system.

Depending if the new calculation option is used or not, the role readiness result can be very different:

	Expected Rating	**Employee Rating**	**Old Score**	**New Score**
Competency 1	4	5	100	100
Competency 2	3	2	0	66
Competency 3	4	3	0	75
Competency 4	2	2	100	100
Competency 5	2	1	0	50
Competency 6	4	2	0	50
			33.33%	**73.50%**

Competency Gap Graph

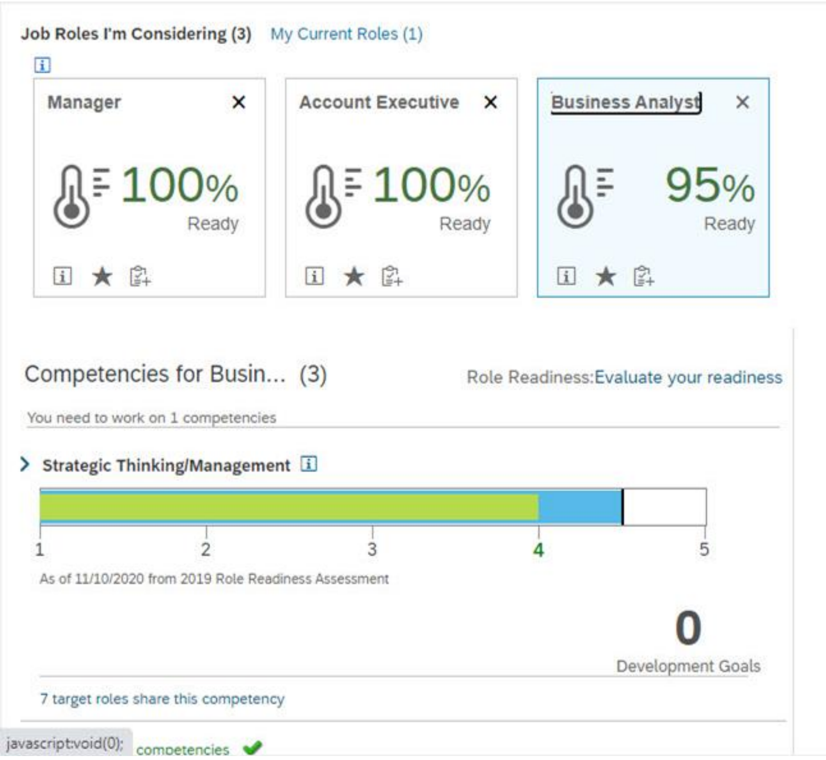
The Career Worksheet has the ability to populate a graph depicting the gap between a competency rating and the expected rating. In the image, the rating exceeds the expectation; so, the competency has been “met”. Ratings come from *completed* PM forms or 360 forms. The last rating will be used in the Career Worksheet - no averaging is supported.

IMPORTANT: The “last_rating” field must point to the rating scale in order to populate correctly and this must be done in XML.

Syntax must be EXACTLY the same as the name of the rating scale in Admin Center.

Gaps are calculated using the Expected Rating from Families & Roles.

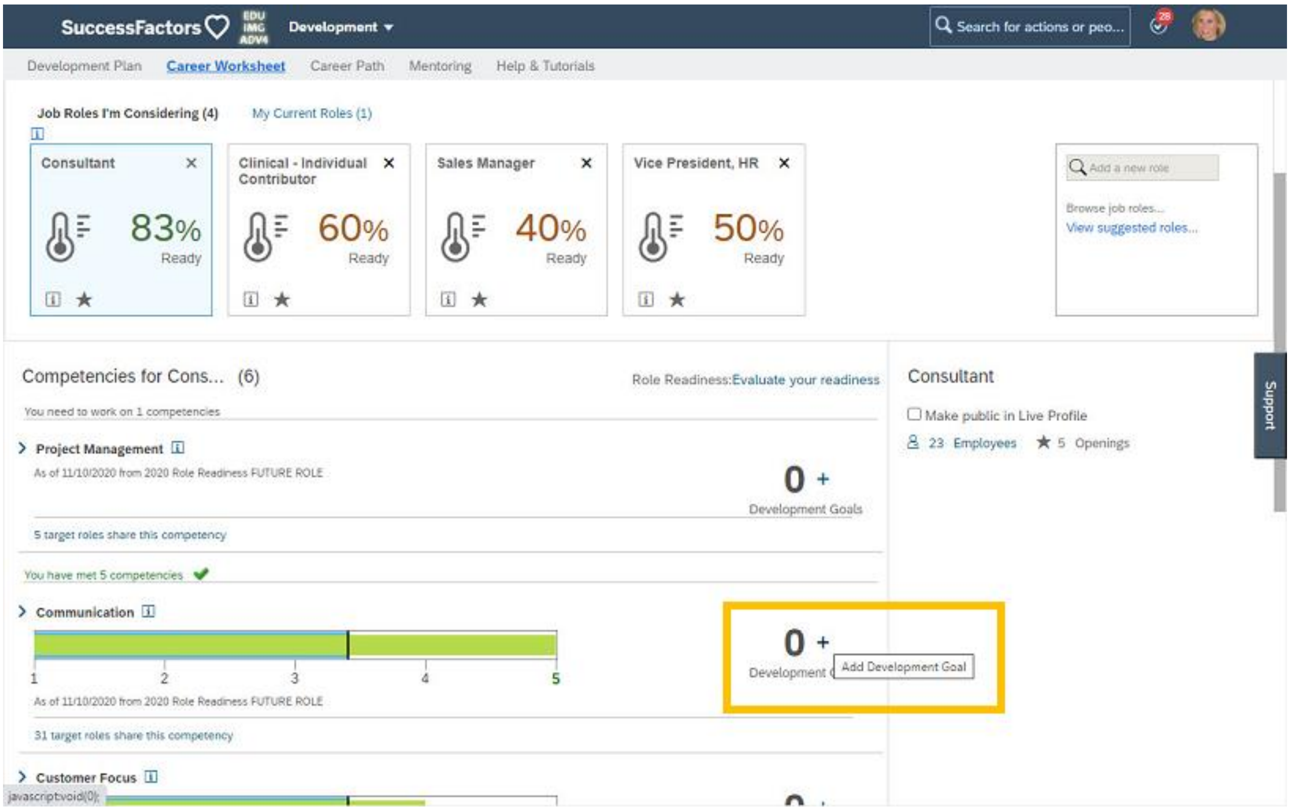
In the example below the competency Strategic Thinking/Management for the role Business Analyst has not been met. The green bar indicates that the employee has a rating of 4 out of 5 for this particular competency but the expected rating as shown in blue is actually 4.5. Other competencies that are not shown factor into the overall score of 95% ready. The employee in this configuration will get partial credit for having a 4 out of 5 even though the expected rating is 4.5. Customers can choose to require competencies to meet the expected rating to get any credit or allow partial credit to be given for competency ratings below the expected rating for a particular competency.



Additionally the Career Worksheet as of 2020 better reflects scores from a user’s last performance review since competencies that were set as “Too New to Rate” in the last performance review are now depicted by a graph that can extend to 0 and show a green icon of a circle with a line through it to signifiy a particular competency was rated in this way. Not-applicable competencies refer to the competencies that were unrated in employees' last performance review. You can see examples of both of these enhancements in the image below.

Development Goals within Career Worksheet

With proper configuration of the career worksheet and development plan, goals can be seen or added from the career worksheet as seen below:



Lesson Conclusion - Purpose, Permissions and Features of Career Worksheet v12

In this lesson, you were introduced to Career Worksheet v12 permissions needed for the Administrator and End User roles.

Lesson 4-2 - Creating or Updating the Career Worksheet v12

Lesson Overview

The goal for this lesson is to approach modifications to the Career Worksheet v12.

Lesson Objective

- Identify the best way to create or update the Career Worksheet v12

How do I create or update the Career Worksheet v12 Template?

Unlike the Development Plan v12, the Career Worksheet v12 template can only be updated in Provisioning via the XML. In order to create a new career worksheet or update a previous one, you will need the assistance of Customer Success or Professional Services.

As the Administrator, you do have the ability to change these options within **Admin Center**:

- Set competencies or expected ratings through Manage Job Roles
- Create/Launch a Role-Readiness Form in Performance Management
- Manage Suggested Roles in Career Development Planning

Exercise - Set Expected Ratings using Manage Job Roles

The goal for this exercise is set expected ratings for competencies used in Career Worksheet v12.

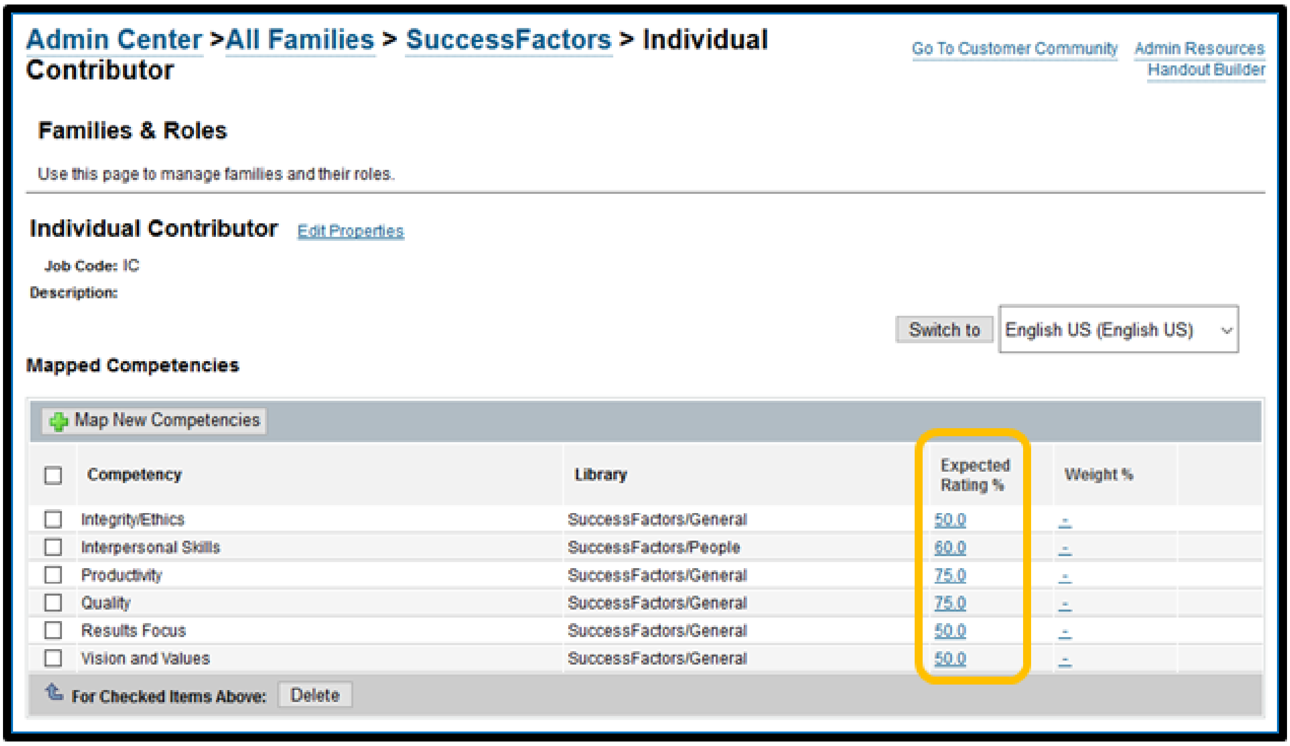
Exercise Objective

Update or set expected ratings for competencies within Manage Job Roles

How do I set an expected rating of a competency?

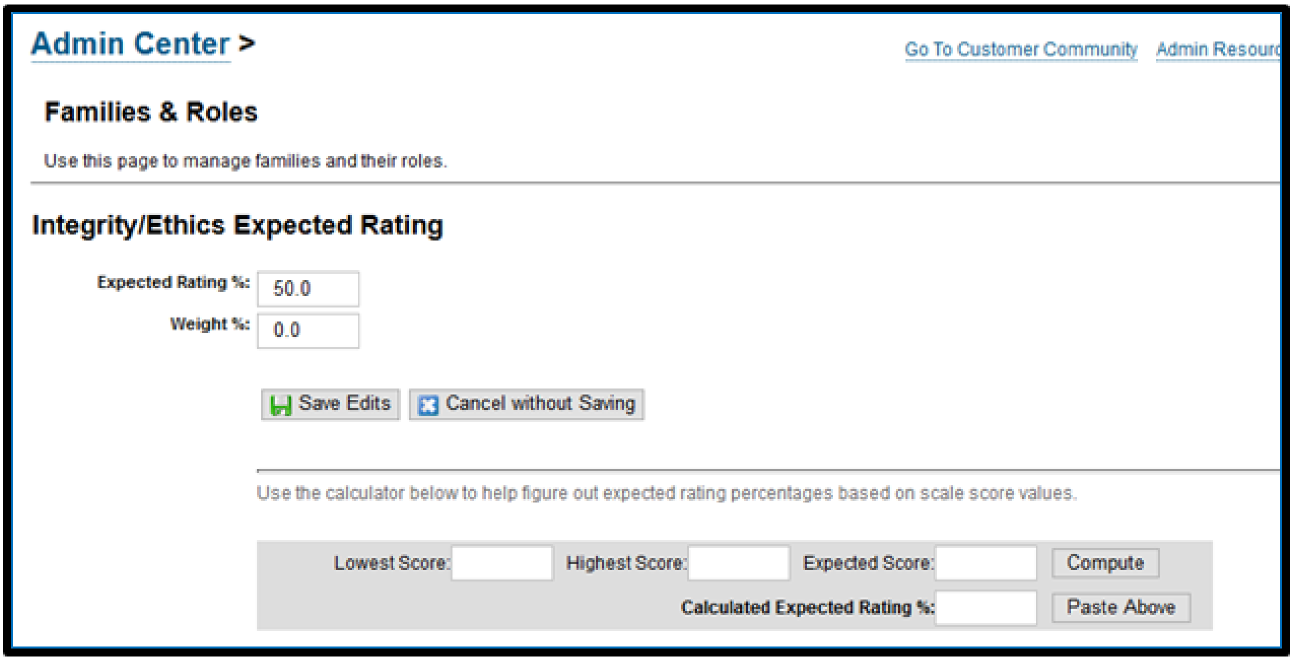
In order to set an expected rating, follow the steps below:

1. Navigate to **Admin Center > Company Settings > Manage Job Roles**
2. Access the desired **Family and Role**
3. Click the **link under the Expected Rating** % column



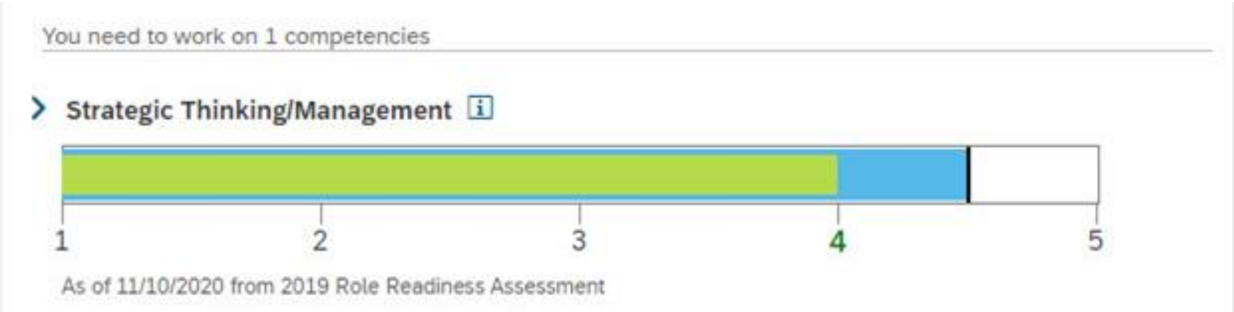
Administrator View: Admin Center > Company Settings > Manage Job Roles

4. Enter the **Expected Rating %**
5. Click the **Save Edits**



Administrator View: Admin Center > Company Settings > Manage Job Roles

After entering the expected ratings for the various competencies, the information displays within the competency gap graph on the Career Worksheet.



End User View: Competency Gap Graph located at Home > Development > Career Worksheet

⚠	This guide references **Admin Center > Company Settings > Manage Job Roles** (also known as Families and Roles) to set or modify the expected rating for the use in the Competency Gap Graph. If your instance employs Job Profile Builder (JPB), these instructions may differ

This concludes Exercise: Setting Expected Ratings Using Manage Job Roles.

Exercise - Create, Launch, and Complete a Role-Readiness Form

The goal for this exercise is to create, launch and complete a Role-Readiness form. Within the Career Worksheet, you can launch a Role-Readiness form (also called a Self-Assessment or Competency Assessment form) which will allow the employee to provide a rating on the **competencies for the future role or the current role**. With the assistance of Customer Success or Professional Services, a specific link is created in the Career Worksheet to access the Role-Readiness Form. The Role-Readiness form allows the employee to see the competency gaps and apply development objectives towards those gaps.

⚠	In order to fully utilize Career Worksheet v12 to include the Competency Gap Graph and Role-Readiness form, you must have access to the Performance Management module.

Exercise Objective

To create, launch and complete a Role-Readiness form, which is also considered a modified Performance Management (PM) form.

How do I create a Role-Readiness Form?

To create a standard role-readiness form, navigate to **Admin Center > Performance Management > Manage Templates**:

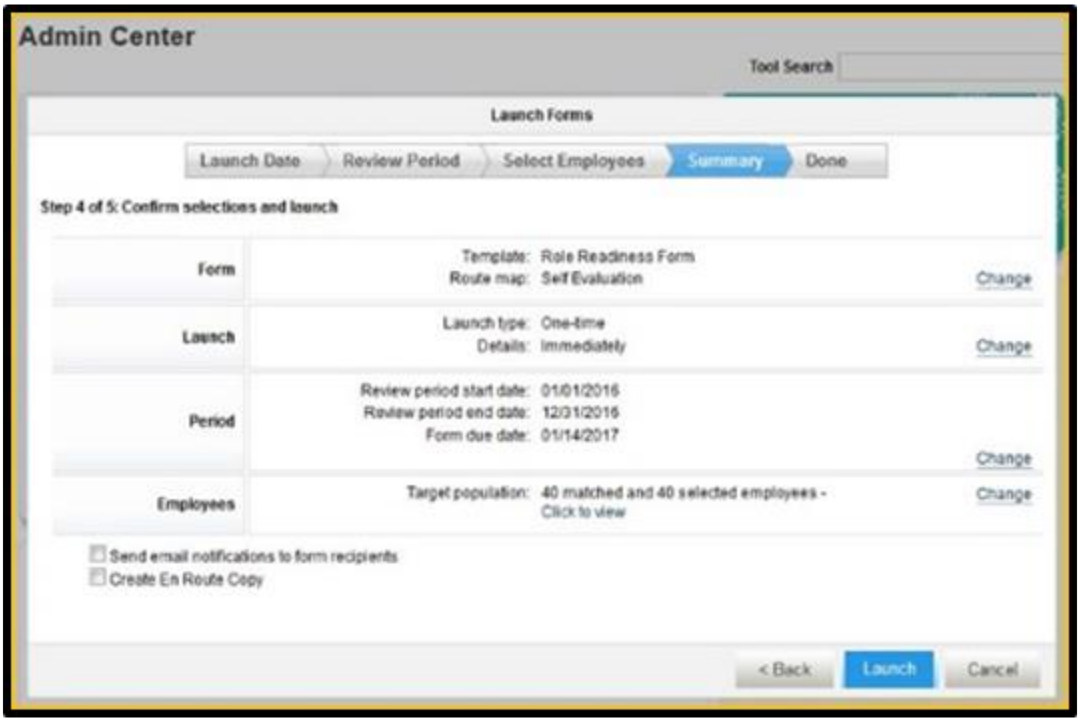
1. Select the **Performance Review** tab.
2. Click **Add a New Template**.
3. Select a desired form – **Annual Review (PMv12)** in the example works, as it has a job-specific competencies section. Change the name if desired.
4. Click **Add to My Instance**.

How do I launch a Role-Readiness Form?

To launch a role-readiness form, navigate to **Admin Center > Performance Management > Launch Forms**:

1. Select the form type and template to start
2. Click Next
3. Choose the following:

   a. Launch Date
   b. Review Period
   c. Select Employees
   d. Choose Launch



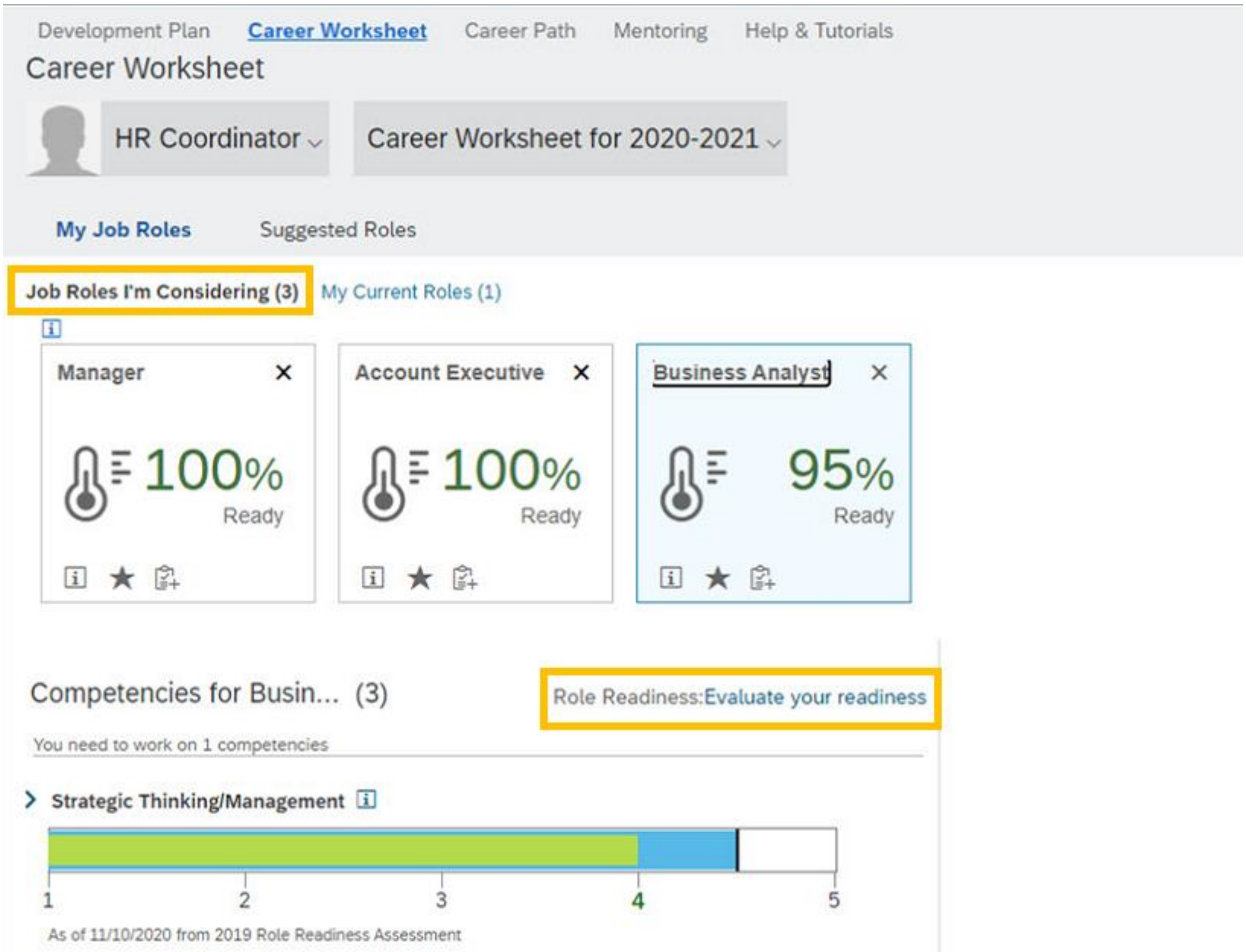
Administrator View: Admin Center > Performance Management > Launch Forms

How do I complete a Role-Readiness Form?

To complete a role-readiness form, be sure you have permissions to view the role-readiness form prior to referencing the name of the route map utilized in the Performance Management form.

1. Review the routemap in Admin **Center > Performance Management > Manage Route map**.
2. Login or Proxy as a person performing the role of the map (i.e.: Manager or Employee Role).
3. With each step in the route map, complete the form by giving ratings, especially competencies.

Begin by launching the form with the link in the Job Roles I'm Considering to assess competency rating for future roles:



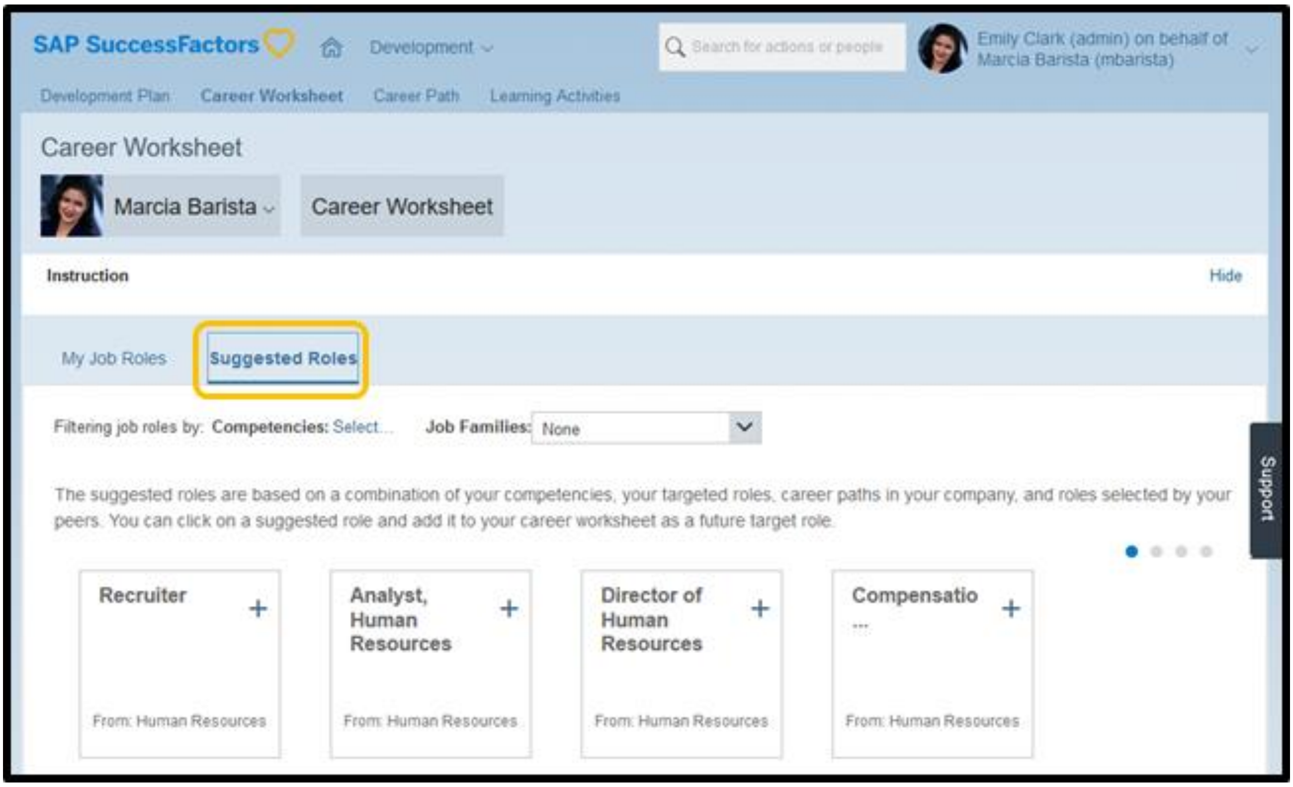
And, each employee can also launch the link Evaluate your readiness on the tab for My Current Roles.

⚠	Be cautious as to the order and launching of the Role-Readiness form and the annual Performance Review form, especially if both allow competency ratings. Whichever form is the latest (or last) is likely to populate the "Last Rating" in the competency gap graph.

This concludes Exercise: Creating, Launching and Completing a Role-Readiness Form.

Exercise - Manage Suggested Roles

The purpose of this exercise is to utilize the Manage Suggested Roles feature that proactively suggests roles which may be a good fit for the employee.

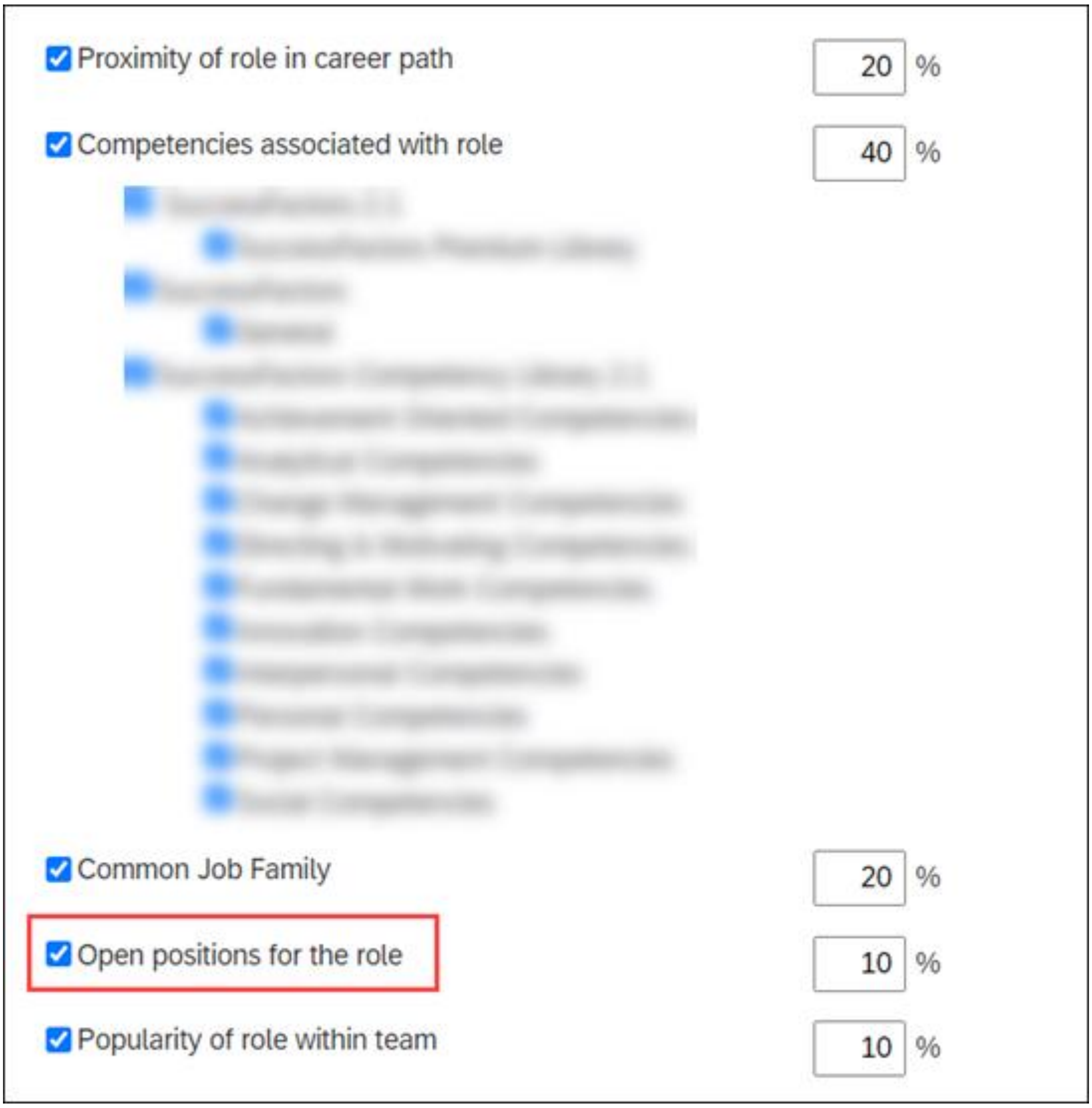


End User View: tab located at Home > Development > Career Worksheet

Out of all the attributes on the previous slide, competencies are weighed the most. Thereby roles with significant competency matches will most likely surface to the top of the list.

The **Suggested Roles** are based on a formula with the following attributes configured in **Admin Center**:

- Competency match: Evaluates the rated competencies of the user against the expected competencies of the role
- Job family: Prefers roles that are in the same family as the employee’s current role
- Open Positions: Prioritizes roles that have open legacy positions from the Succession module. The score is determined by whether there are open legacy position in Succession and gives a 1 if there are open positions and 0 if there are no open positions. NOTE: this option is only available for use when using legacy positions. This criteria will not apply to MDF positions.
- Distance in career path: Prioritizes roles that are on the user’s career paths
- Peer popularity: Prioritizes roles that are selected by peers, that is the employees that share the same manager. The score is calculated with the formula: the number of peers who have a particular role as their target role/the number of peers.
- Eliminates roles that are already selected



Exercise Objective

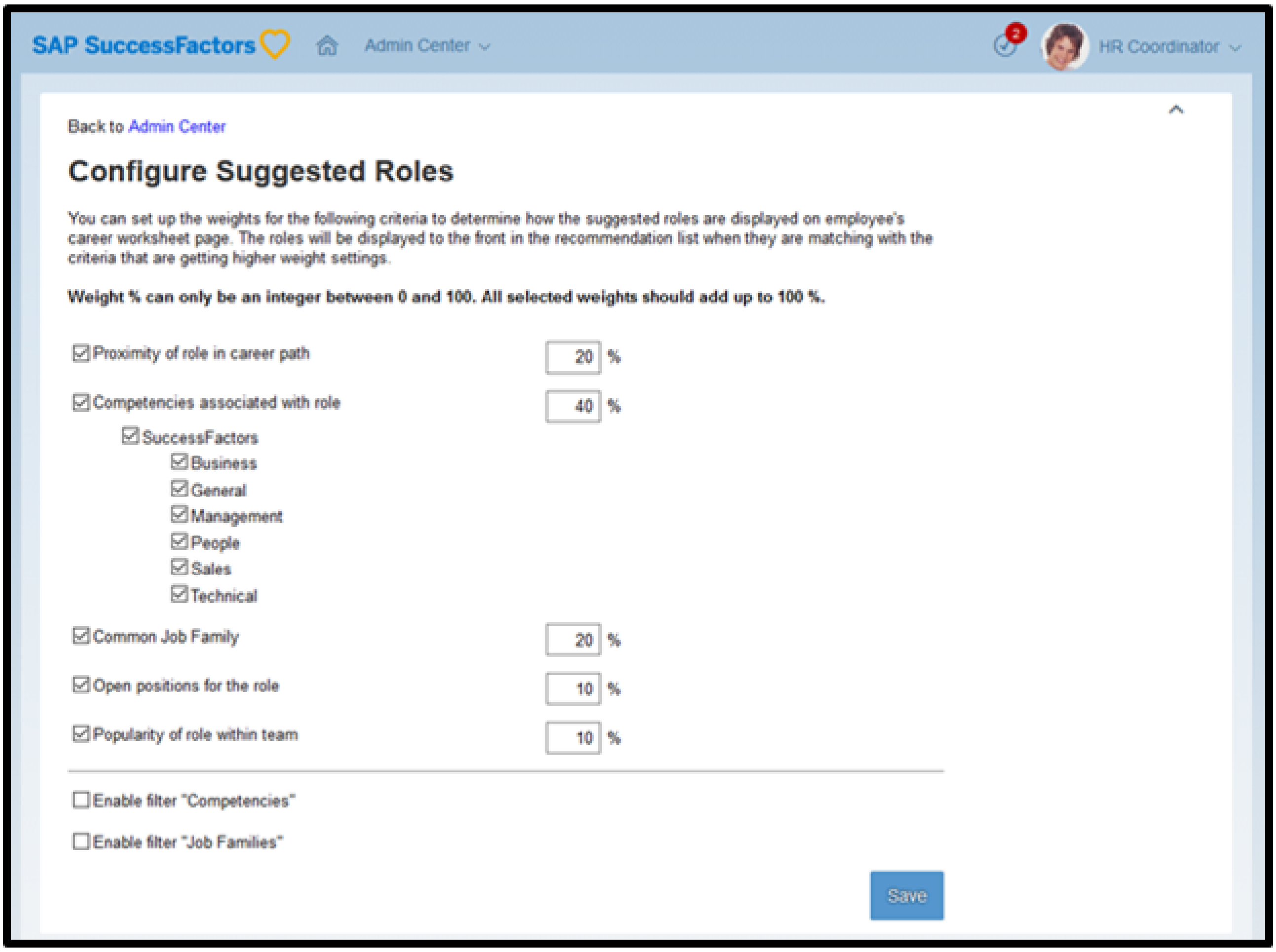
To configure or modify the formula which manages the Suggested Roles of the Career Worksheet

How do I configure or modify the Suggested Roles information?

1. Use the Action Search to locate **Manage Suggested Roles**
2. Enable and weight the preferred criteria for your company
3. Turn on the filters for Competencies and Job Families
4. Click **Save**

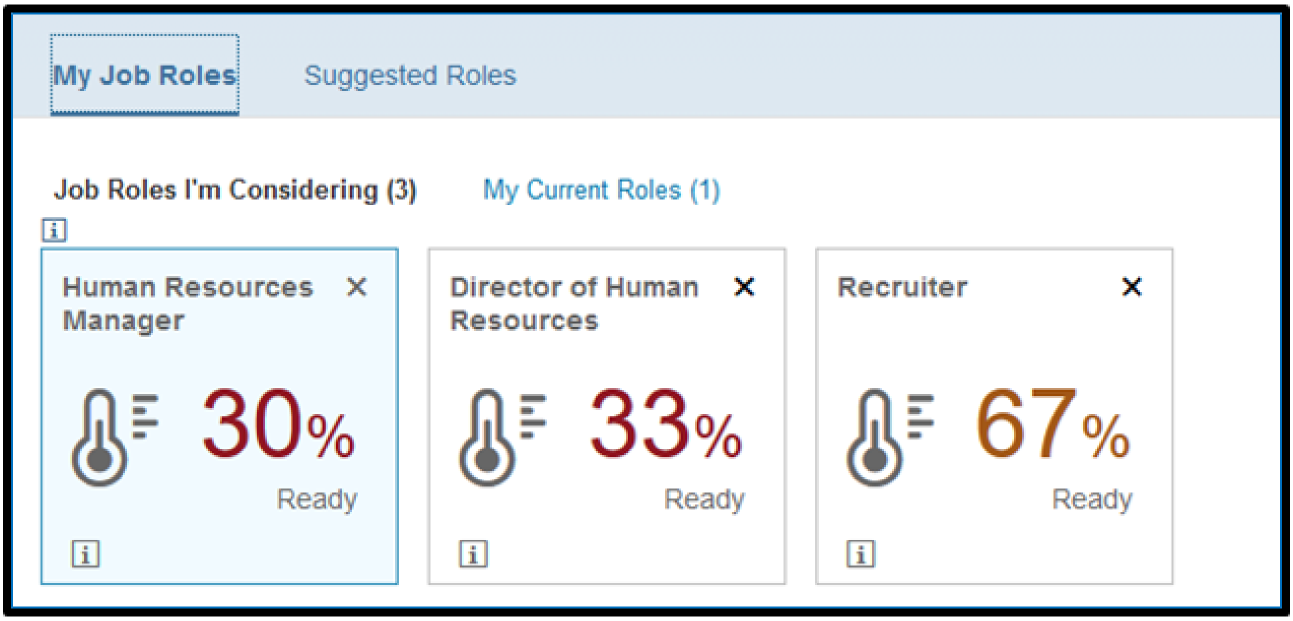
	Be aware of the permissions located in Manage Permission Roles. If you are not able to see the Manage Suggested Roles option within **Admin Center > Development**, verify the permission settings.

An example of this type of configuration is below:



Administrator View: Admin Center > Development > Manage Suggested Roles

Once you have the settings to your preference, simply go to the **Suggested Roles** tab within the **Home > Development > Career Worksheet** and click the + icon to add any role. After performing this action, the new role will appear in the **Job Roles I'm Considering** area of the Career Worksheet as well as crosscheck any competency ratings of the employee. Once this is completed, the **Role-Readiness Meter** will populate a percentage if the data exists like adding the Human Resources Manager role:



This concludes the lesson and exercises of Unit 4.

Lesson Conclusion - Creating or Updating the Career Worksheet v12

In this lesson, you were introduced to approach modifications to the Career Worksheet v12.

Unit Wrap-Up

In this unit, you covered:

- Lesson 4-1: Purpose, Permissions and Features of Career Worksheet v12
- Lesson 4-2: Creating or Updating the Career Worksheet v12

You should now be able to:

- Purpose of Career Worksheet v12
- Permissions for Career Worksheet v12
- Understanding features of a Career Worksheet v12

- Modifications to options and settings in Admin Center

Unit 5 - Career Path within CDP

Unit Objectives

This unit contains two general lessons and four exercises about the following:

- Lesson 5-1: Purpose of Career Path within CDP
- Lesson 5-2: Activation of Career Path Function

Upon completing this unit, you will be able to:

- Purpose of the Career Path Functionality
- Activation, Configuration and Permissions of Career Path
- End User Actions within Career Path

Lesson 5-1 - Purpose of Career Path within CDP

Lesson Overview

The goal for this lesson is to describe the purpose and usage of Career Path.

Lesson Objective

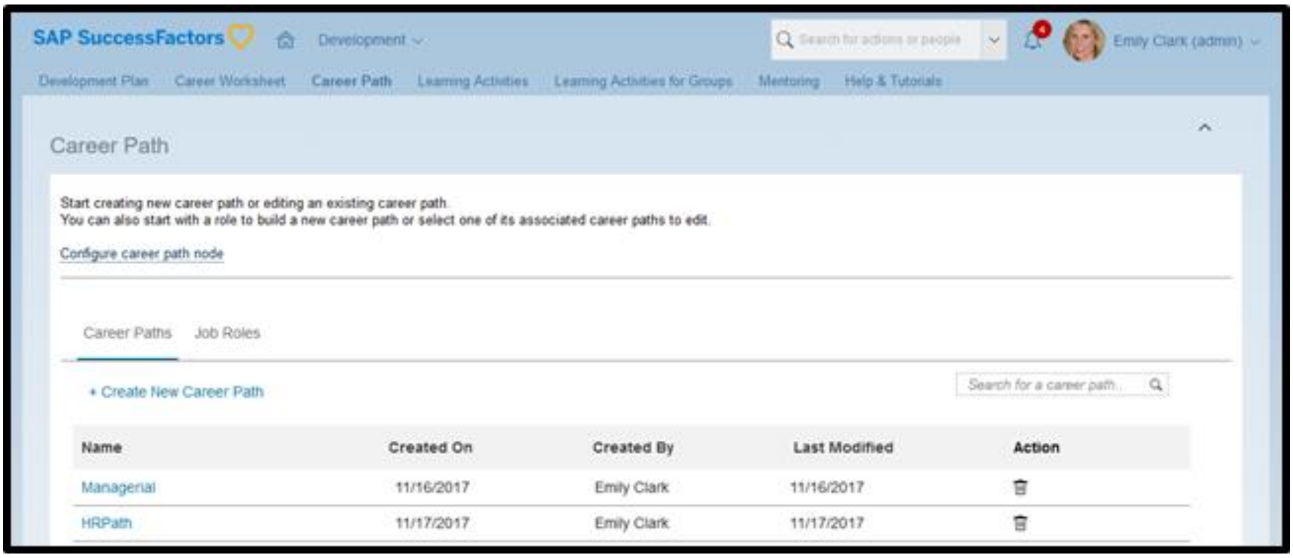
- Determine the purpose of Career Path for the Employee

What is the Purpose of Career Path in Career Development Planning?

The Career Path displays information about the expected path for a position or various positions.

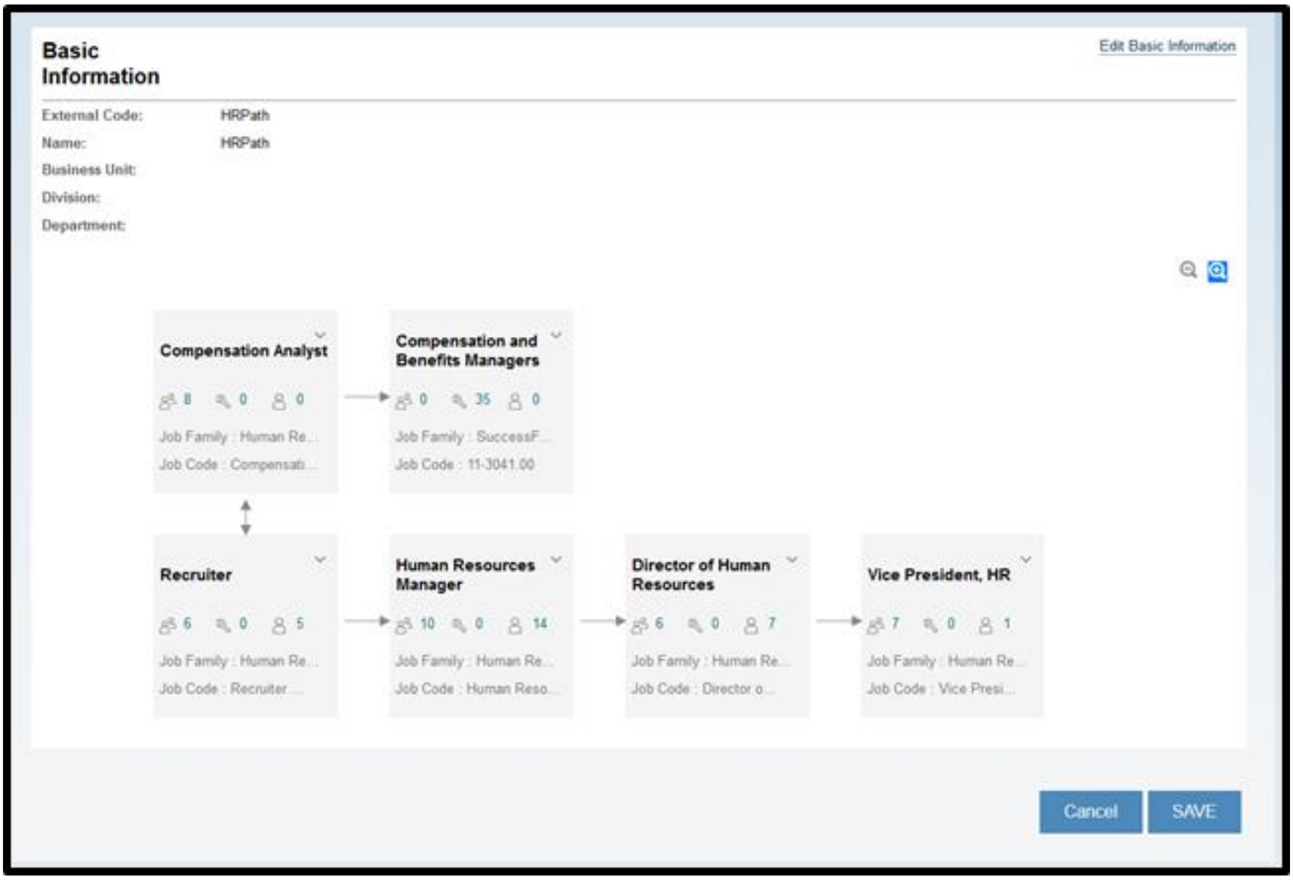
Administrators or other assigned roles (HR managers, for example) are responsible for creating or managing Career Paths. Employees simply utilize the paths as visual next steps in career progression or transition.

Career Path v2 enables the creation of unique and complex organizational career paths. HR managers or other assigned roles can create multiple new career paths, associate them to a given role, and restrict access as needed throughout the organization. After enabled and permissioned, navigate to **Home > Development and click on Career Path** to view the functions as a user.



End User View: Home > Development > Career Path Tab

To view a path, simply click on the **Name** to see the following:



End User View: Home > Development > Career Path

We will discuss more configurations and actions as we continue in this unit.

Lesson Conclusion - Purpose of Career Path within CDP

In this lesson, you were introduced to describe the purpose and usage of Career Path.

Lesson 5-2 - Activation of Career Path Function

Lesson Overview

The goal for this lesson is to provide the next steps in activating Career Path.

Lesson Objective

- Discuss the next steps and pre-requisites to activate Career Path

How do I activate Career Path in Career Development Planning?

The Career Path functionality is primarily configured within the Admin Center. However, the feature must initially be enabled by Customer Success or Professional Services. You also need to be aware that this feature requires usage of the Role-Based Permissions (RBP) module as well as the Metadata Framework (MDF). If you are not able or willing to utilize these pre-requisites, Career Path v2 is not possible at this time.

Exercise - Configuration of Career Path Object

The goal for this exercise is to configure the Career Path Object located in Admin Center.

Exercise Objective

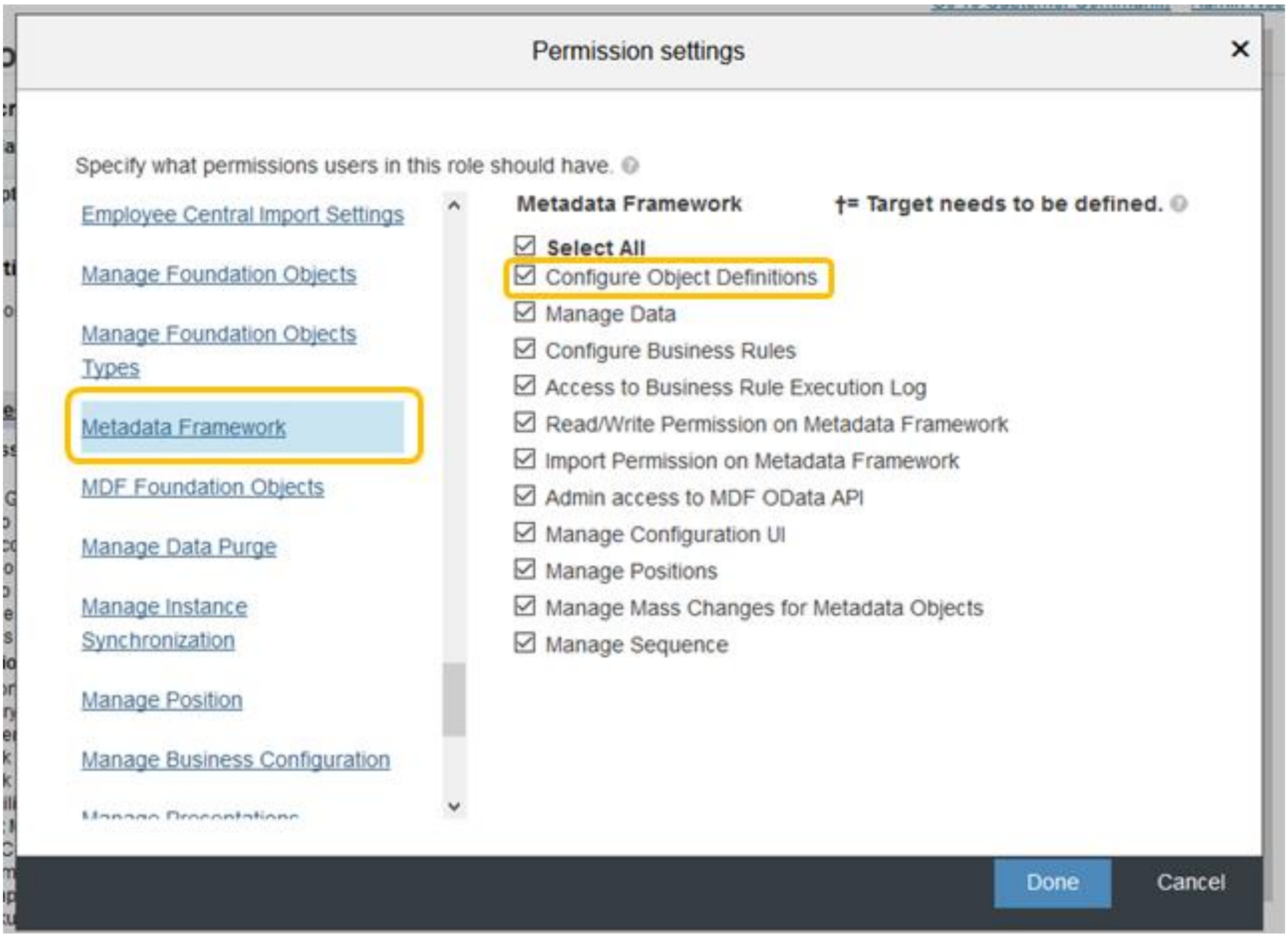
Demonstrate the configuration steps for the Career Path Object in Admin Center

How do I configure the Career Path Object?

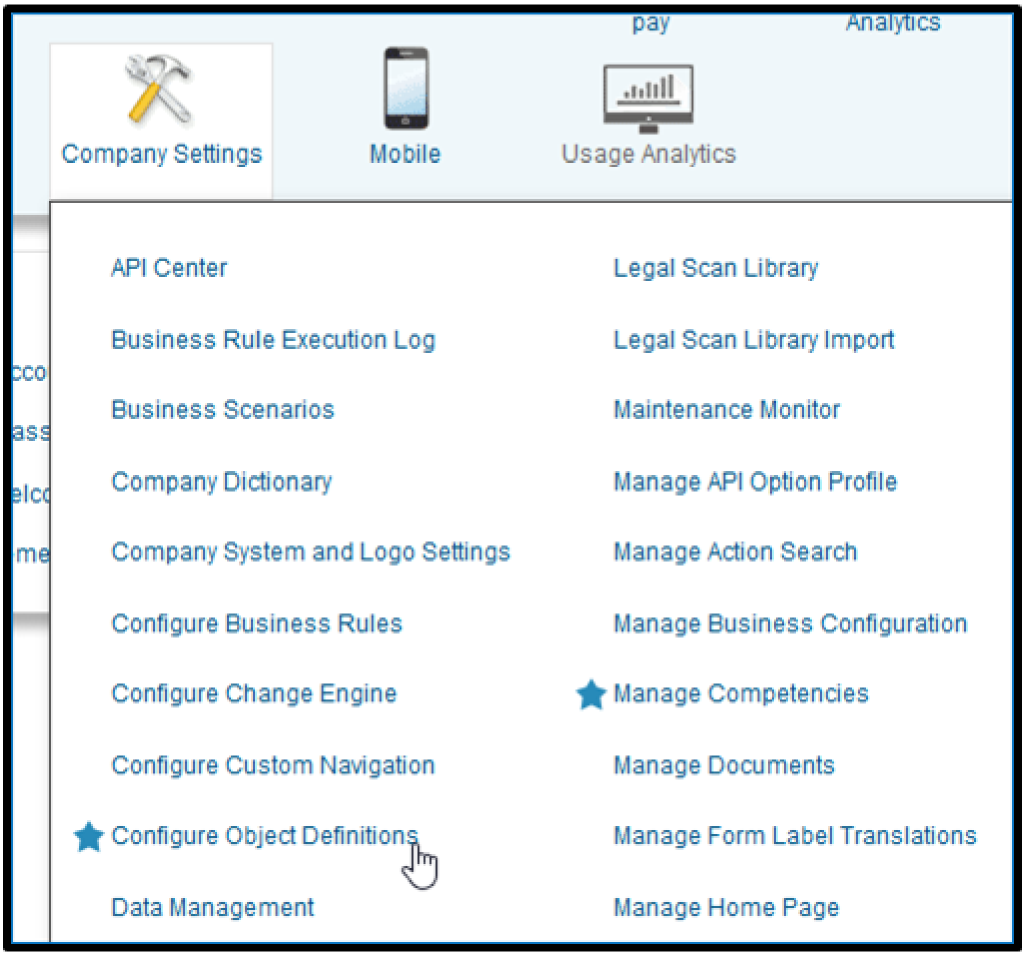
Once Career Path v2 and its pre-requisites are enabled by Customer Success or Professional Services, set the appropriate permission to configure the object:

1. Using Action Search, locate Manage Permission Roles.
2. Click on the role and Permission button.
3. Scroll down to the Metadata Framework under Administrator Permissions.
4. Enable Configure Object Definitions.
5. Click Done and Save Changes.

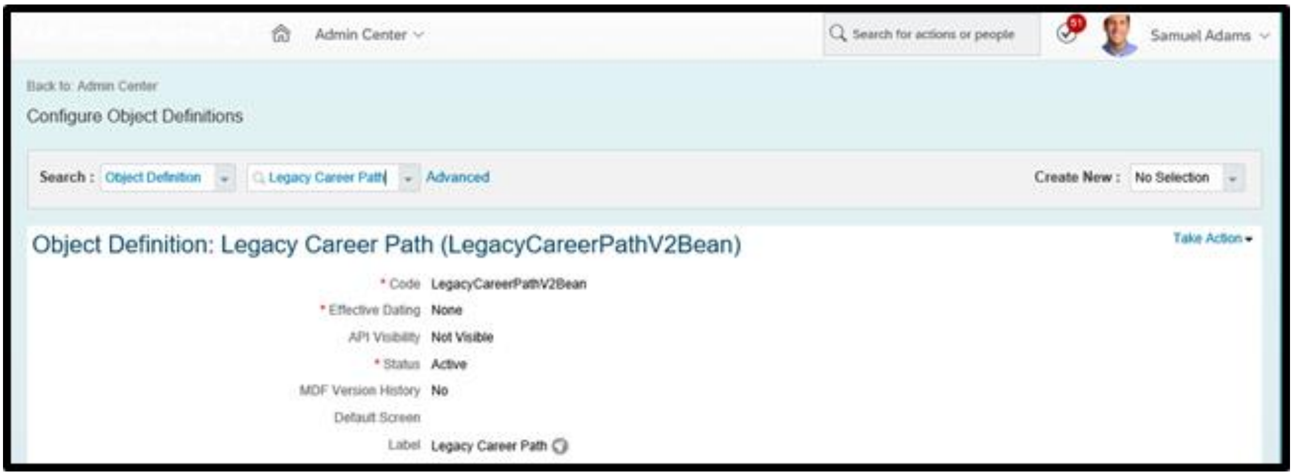
Below is a screenshot of the permission to grant:



After logging out and back in to your instance, **Configure Object Definition** should be available here in **Admin Center > Company Settings**:

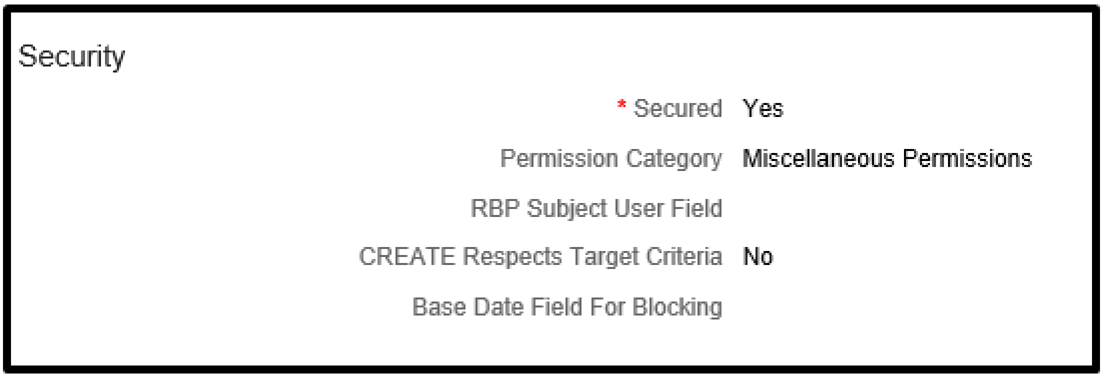


Once in this area, select the **Object Definition** and **Legacy Career Path**. Be sure that the object is active. Start by going to **Take Action** and select **Make Correction**. Once in editable mode, you can verify the object is active along with required fields.



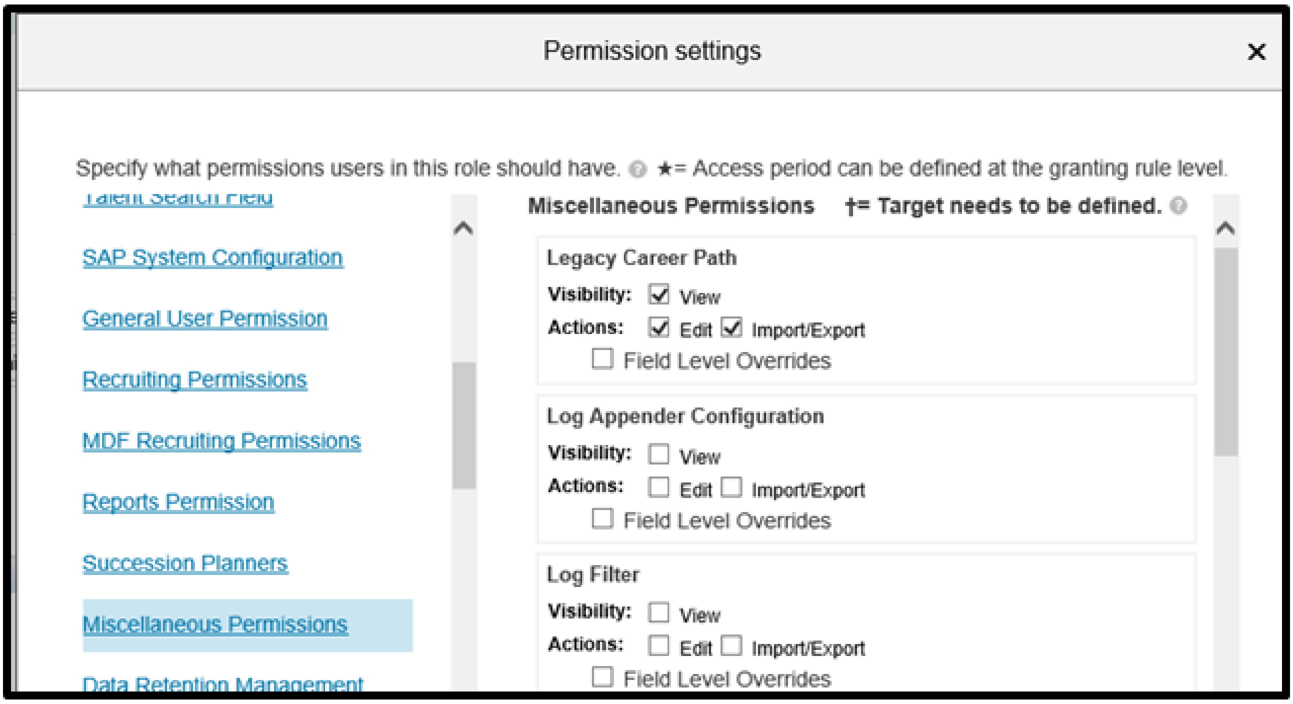
	You will likely need the assistance of Professional Services for the initial configuration of this object or other objects using the Metadata Framework (otherwise known as the Generic Object).

Now, set the **Secured Option to Yes and Permissions Category to Miscellaneous Permissions** as seen below:



Be sure to logout and back into the system to view your new permissions in the miscellaneous section of Manage Permission Roles. Go to **Admin Center > Set User Permissions > Manage Permission Roles** and click on the role along with Permission button. Scroll down to Miscellaneous Permissions to view Career Path object permissions. The label you give within Configure Object Definition is the name you see in this section. Choose the level of permission you desire for the role and click Done as well as Save Changes.

The area should look similar to the screen below:



What you see in RPB may be confusing at this stage even if Career Path v2 is properly enabled. The Career Path permissions in Miscellaneous Permissions in RBP are tied to if you have Job Profile Builder enabled and not which Career Path version you have.

- If the legacy families and roles system is used, then RBP will display 'Legacy Career Path' permissions. Do not worry! You will have Career Path v2 enabled, but in RBP you will still see 'Legacy Career Path'. You need to enable 'Legacy career Path' permissions.
- If Job Profile Builder is used, then RPB will display 'Career Path' permissions in Miscellaneous Permissions. You will enable these permissions for users to see Career Path v2.

This concludes Exercise: Configuration of the Career Path Object.

Exercise - Creation and Modification of the Career Path

The goal for this exercise is to create/modify the Career Path Object.

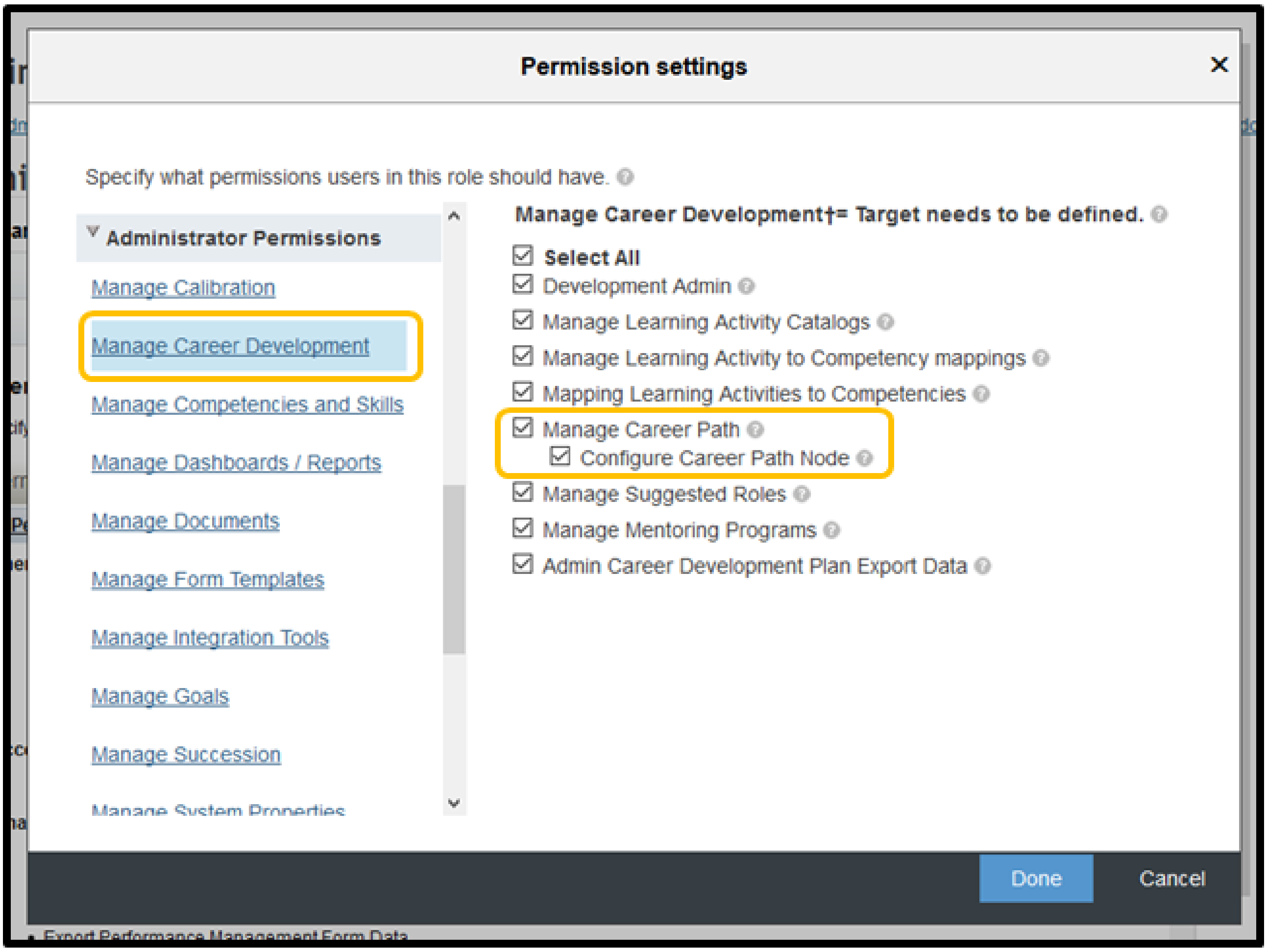
Exercise Objective

- Demonstrate the configuration steps to Manage Career Path

How do I manage a career path object via creation or modification?

Before attempting to manage a career path object, be sure to enable the permissions controlling these actions by performing the following steps:

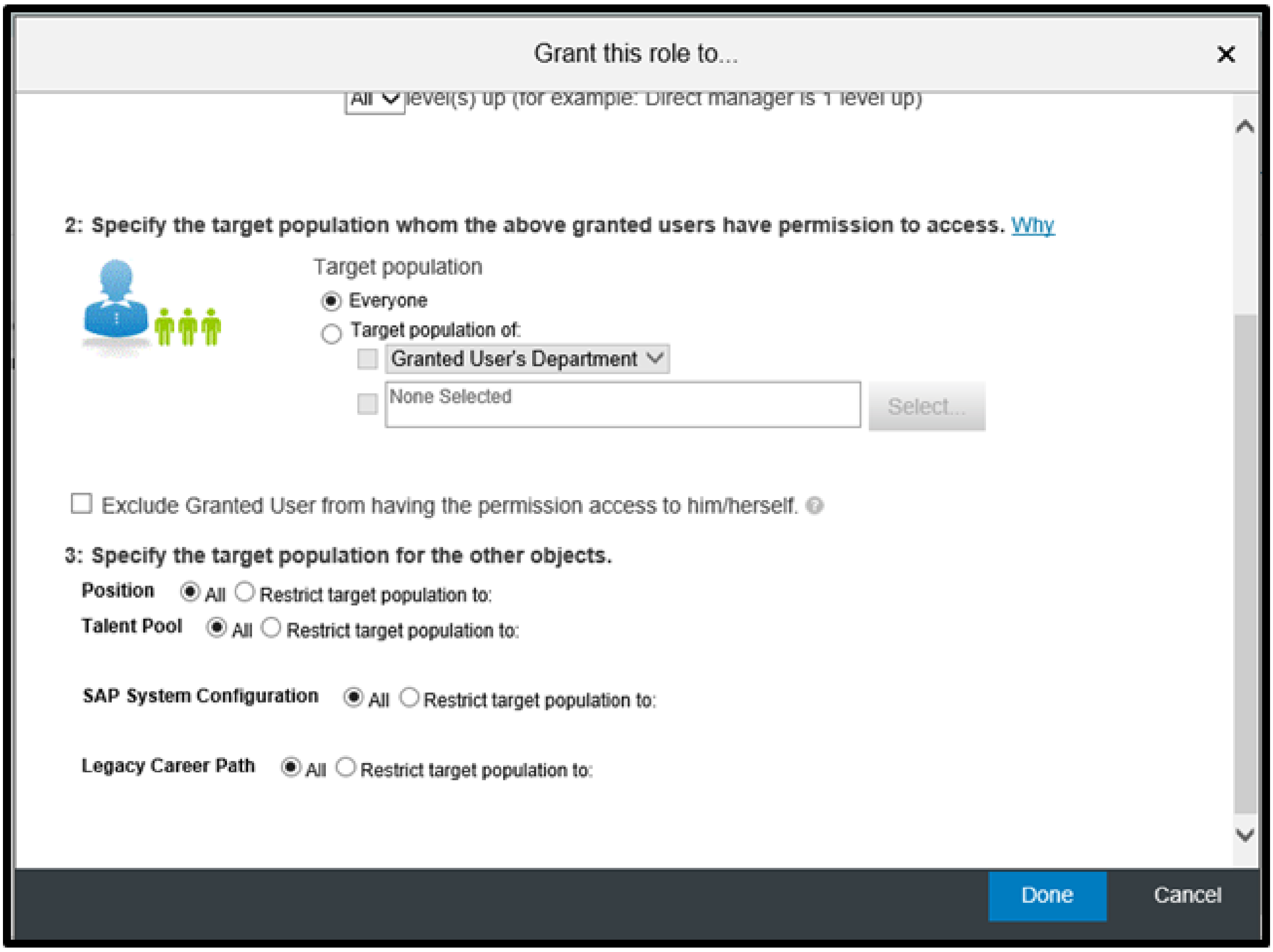
1. Navigate to **Admin Center > Set User Permissions > Manage Permission Roles**.
2. Select the **Super Admin** role (or the appropriate role for this permission; for example, you may have a role whose only job is to create and manage Career Paths).
3. Click the **Permission** button.
4. Navigate to **Manage Career Development**.
5. Select **Manage Career Path**.
6. Select **Configure Career Path Node** if you want to grant the right to specify which elements to display or hide on role nodes in the Career Path. Additional details about this feature are provided later in this section.



Crosscheck the Miscellaneous Permissions granted to the Career Path Object for this role. This will allow view or edit access to all Career Paths and all fields within each Career

Path. Some roles may be assigned the ability to create Career Paths which is the edit option, while others simply need to be able to read Career Path details which is the view option.

Define the target populations within this permission section to finalize the actions.

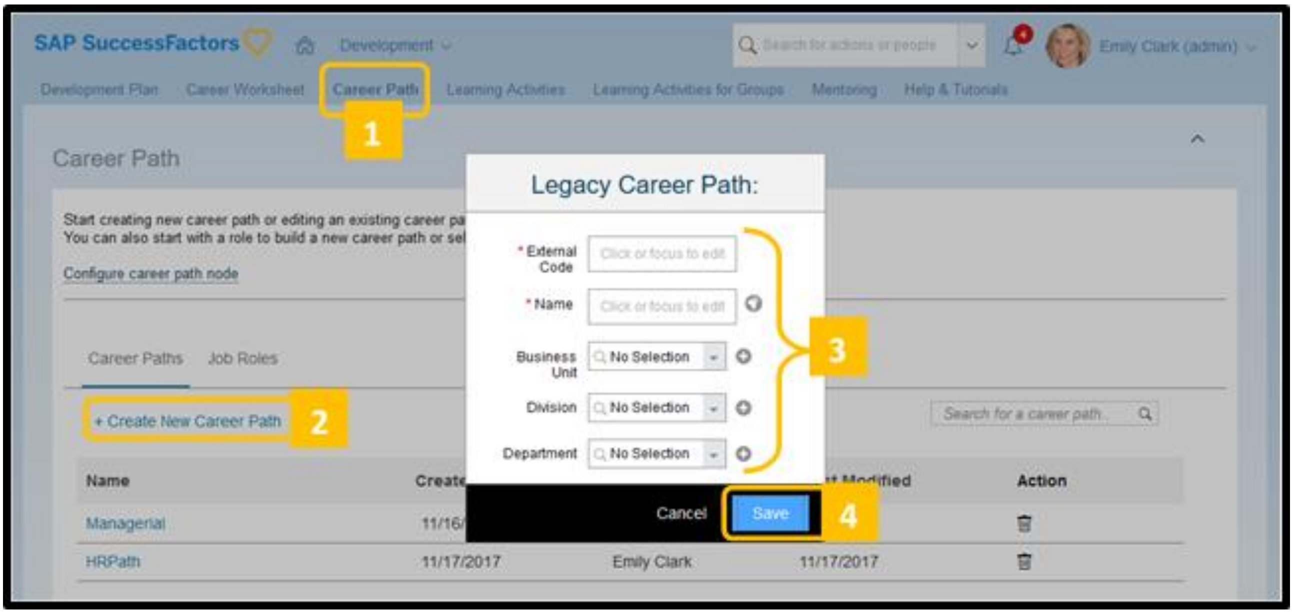


Now that our permissions are correct, use the following steps to set up a Career Path:

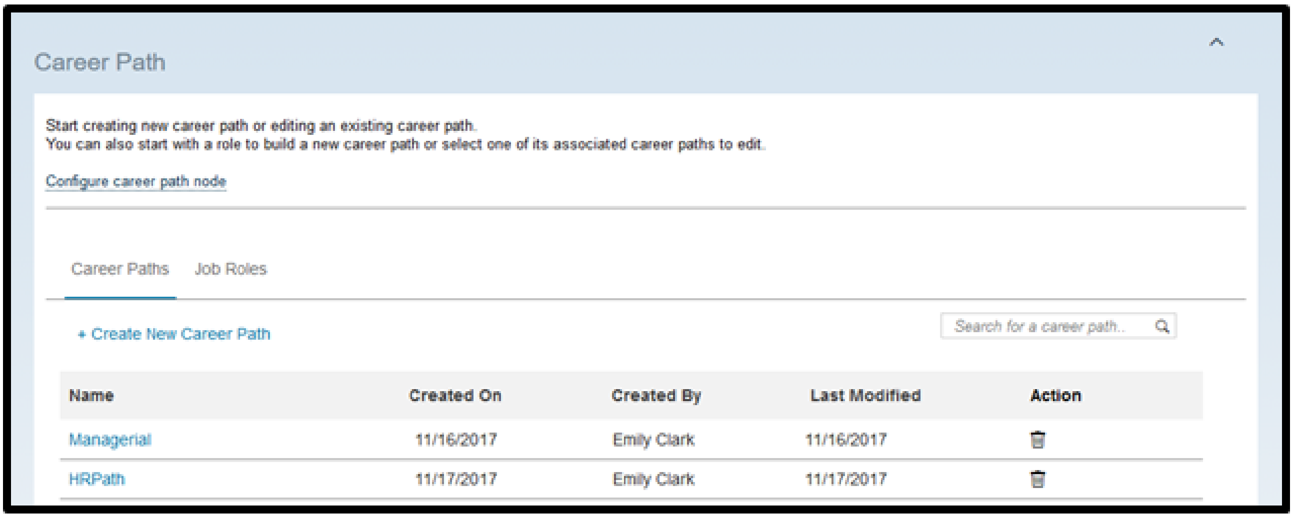
1. Navigate to **Home > Development > Manage Career Path**.
2. Click **Create New Career Path**.
3. Enter **relevant information for the Career Path**

- External Code and Name are required.
- Other fields, such as Business Unit, Division, Department, are optional.
  - The Business Unit, Division and Department criteria enable you to restrict access to the career path to employees belonging to these areas, as described earlier in this section.

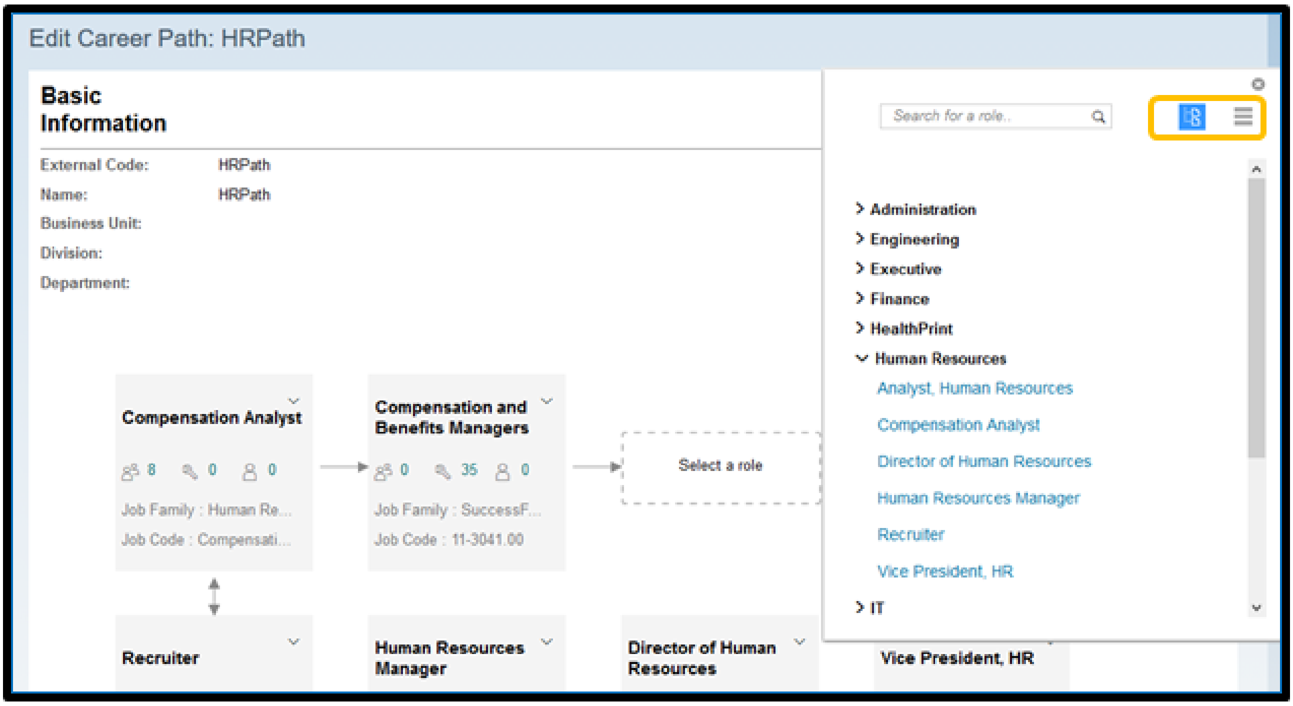
4. Click **Save.**



After adding Career Paths to the system, continue the process by connecting job roles (called "role nodes") to paths. Click the **Career Path Name** or enter the Career Path name in the **search box**.



1. Click Select a Role.
2. Click a role name or search for a role.
3. Click Save.



Once you have added an initial role node, click the down arrow to the right of the role and select an option to update the Career Path:

Add a lead-from role

- Inserts a preceding role to the left of the current node.

Add a lead-to role

- Inserts a forward-progression role to the right of the current node.

Add a peer role

- Inserts a lateral role above the current node. You can add a maximum of two peer roles to any given node.

Replace node with a new role

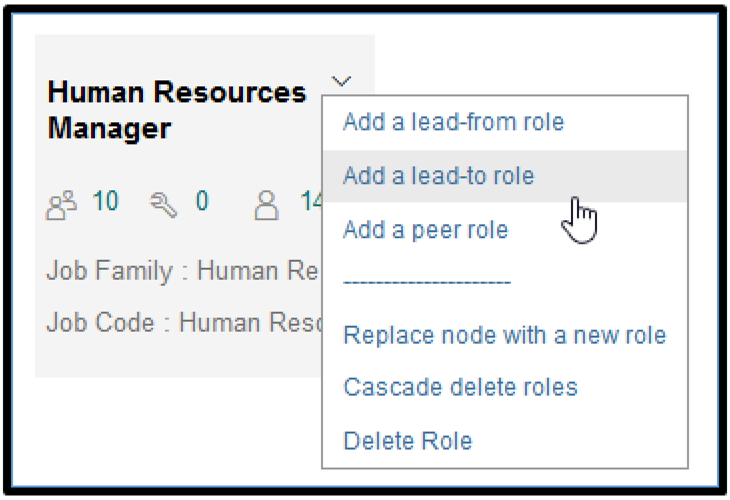
- Removes and replaces the current node with a role of your choice. This does not affect any other nodes in the career path.

Cascade delete roles

- Removes the current node and any forward-progression nodes following it.

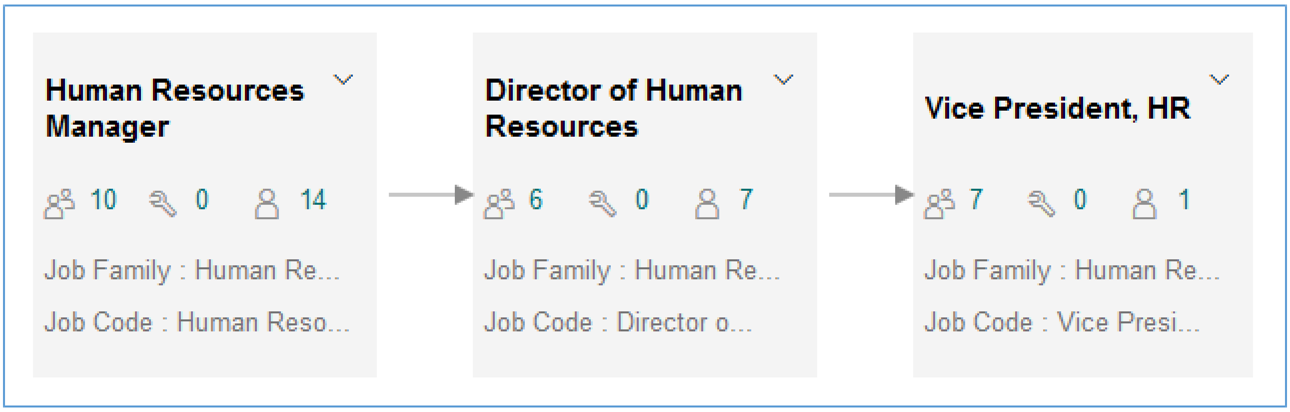
Delete Role

- Removes the current node and connects the Lead-from role to the Lead-to role.



The following example shows a Career Path with three role nodes. Each node displays information about key elements for the job role:

- Number of competencies needed for taking the job role
- Number of skills needed for taking the job role
- Number of people holding this role
- Job Family
- Job Code

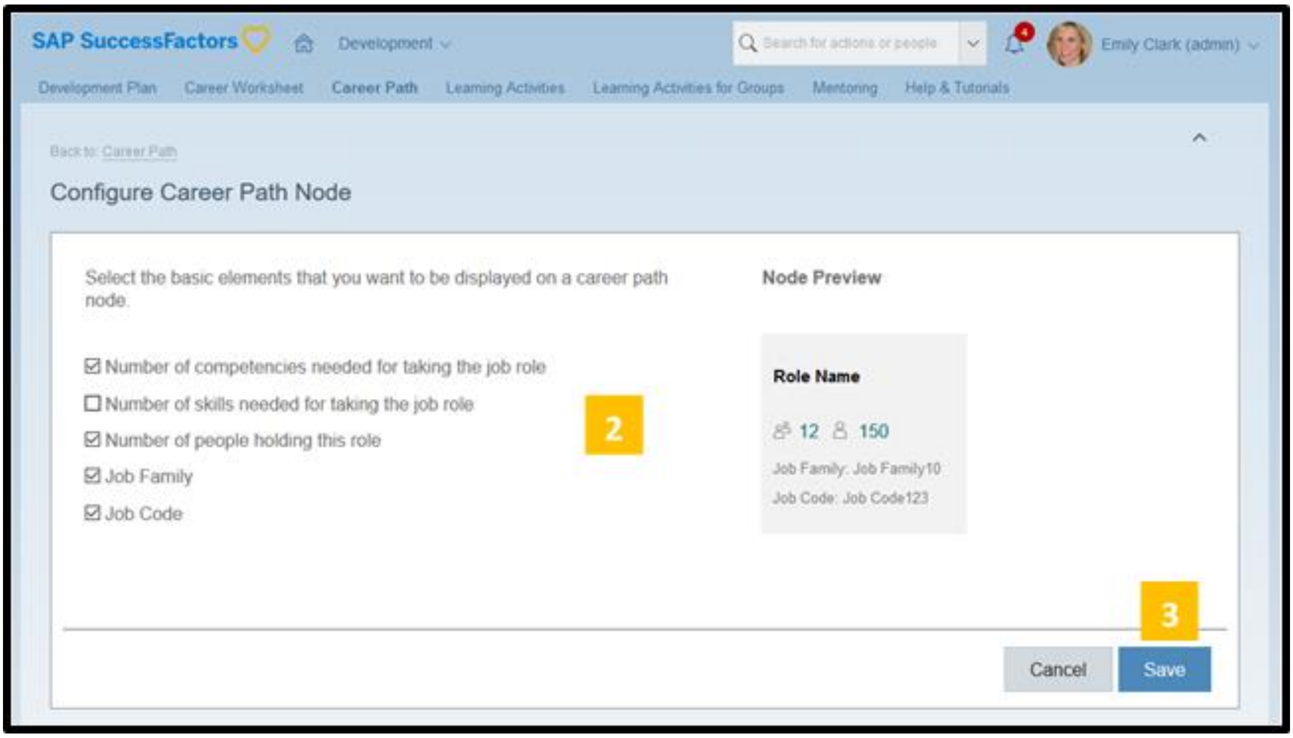


The **Configure Career Path Node** permission mentioned earlier in this section allows permissioned users to decide which key elements will be viewable on a Career Path. For example, a client may not use skills in their job role setup, so they might want to remove the skills display.

To configure the display of elements on Career Paths:

1. Click **Configure Career Path** Node under Manage Career Path.
2. Select the desired **element checkboxes**. In the example below, skills has been removed and the skills icon does not display.
   This will flow over to the Career Path.

3. Click **Save**.



Now that the node is configured, this concludes the lessons and exercises pertaining to Unit 5.

Lesson Conclusion - Activation of Career Path Function

In this lesson, you were introduced to provide the next steps in activating Career Path.

Unit Wrap-Up

In this unit, you covered:

- Lesson 5-1: Purpose of Career Path within CDP
- Lesson 5-2: Activation of Career Path Function

You should now be able to:

- Purpose of the Career Path Functionality
- Activation, Configuration and Permissions of Career Path
- End User Actions within Career Path

Unit 6 - Capabilities of CDP and Learning

Unit Objectives

This unit contains two general lessons about the following

- Lesson 6-1: Integration of CDP and LMS
- Lesson 6-2: Additional Features in Admin Center
- Lesson 6-3: Learning Activities for non-LMS Customers

Upon completing this unit, you will be able to:

- Approach the integration CDP and LMS
- Locate the features appearing in Admin Center after Integration
- Describe options regarding Learning Activities for non-SAP SuccessFactors LMS Customers

Lesson 6-1 - Integration of CDP and LMS

Lesson Overview

The goal for this lesson is to the approach needed to integrate Career Development Planning (CDP) and Learning Management System (LMS).

Lesson Objective

- Identify the next steps to integrate these two modules

What Actions must be taken to Integrate CDP and LMS?

Career Development Planning (CDP) is capable of integrating with the SAP SuccessFactors Learning Management System (LMS). However, you must have purchased the CDP and LMS modules as well as engage with Professional Services for this functionality. Once this implementation is completed, you will have additional capabilities within Admin Center if given the appropriate permissions.

Lesson Conclusion - Integration of CDP and LMS

In this lesson, you were introduced to the approach needed to integrate Career Development Planning (CDP) and Learning Management System (LMS).

Lesson 6-2 - Additional Features in Admin Center

Lesson Overview

The goal for this lesson is raise awareness of additional features after the integration between Career Development Planning (CDP) and Learning Management System (LMS) including the ability to import learning activity.

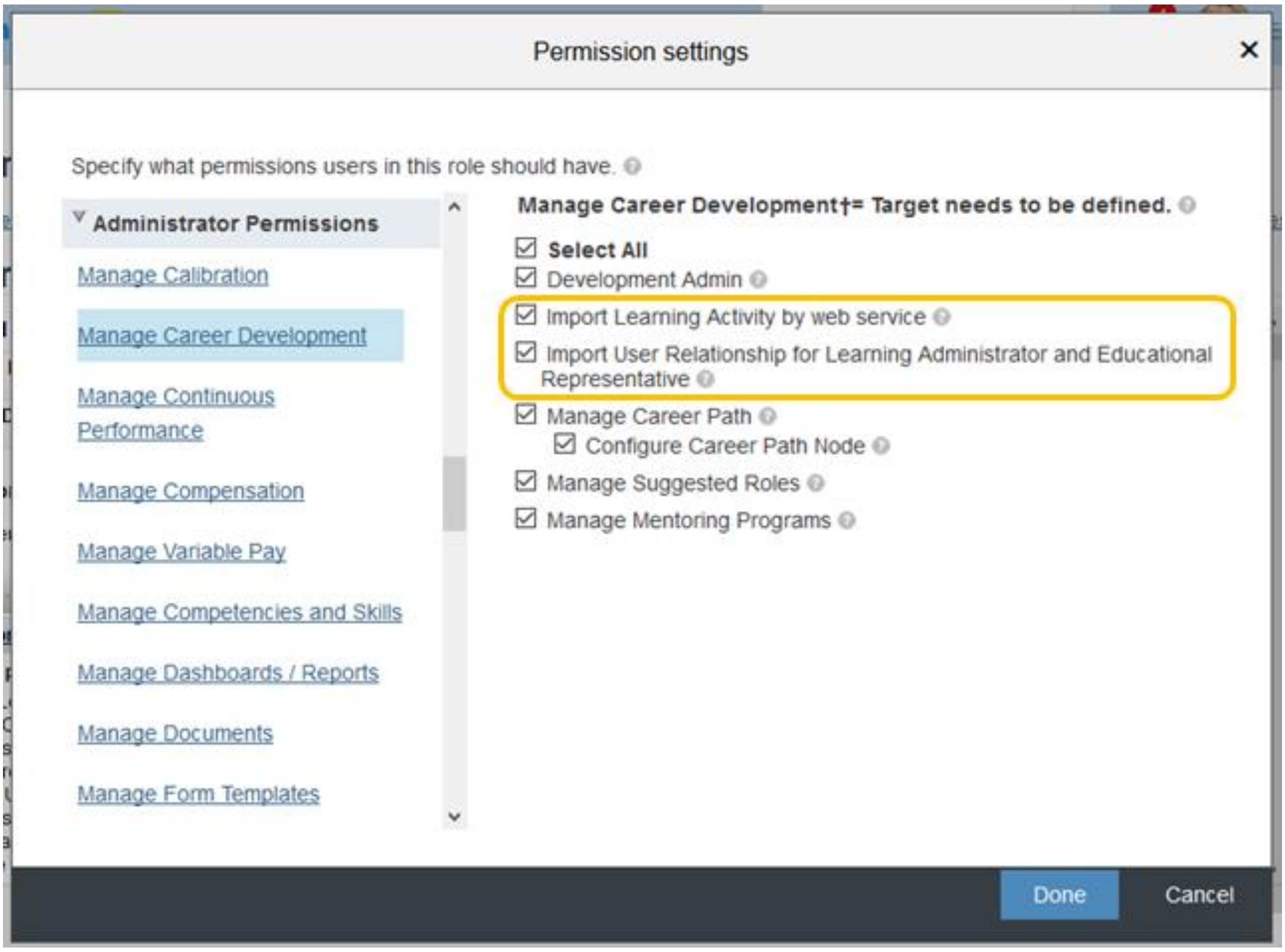
Lesson Objective

- Discuss the additional administration features after integration
- Import Learning Activities with Development Goals

What Admin Center Options Appear after CDP and LMS Integration?

After the integration of CDP and LMS is completed with Professional Services, the Administrator will have access to some new or additional features of Admin Center within Permissions and Development.

When navigating to **Admin Center > Set User Permissions > Manage Permission Roles**, select the admin role and the **permission** button. When finished, go to the **Administrator Permissions** and then **Manage Career Development** as seen below:

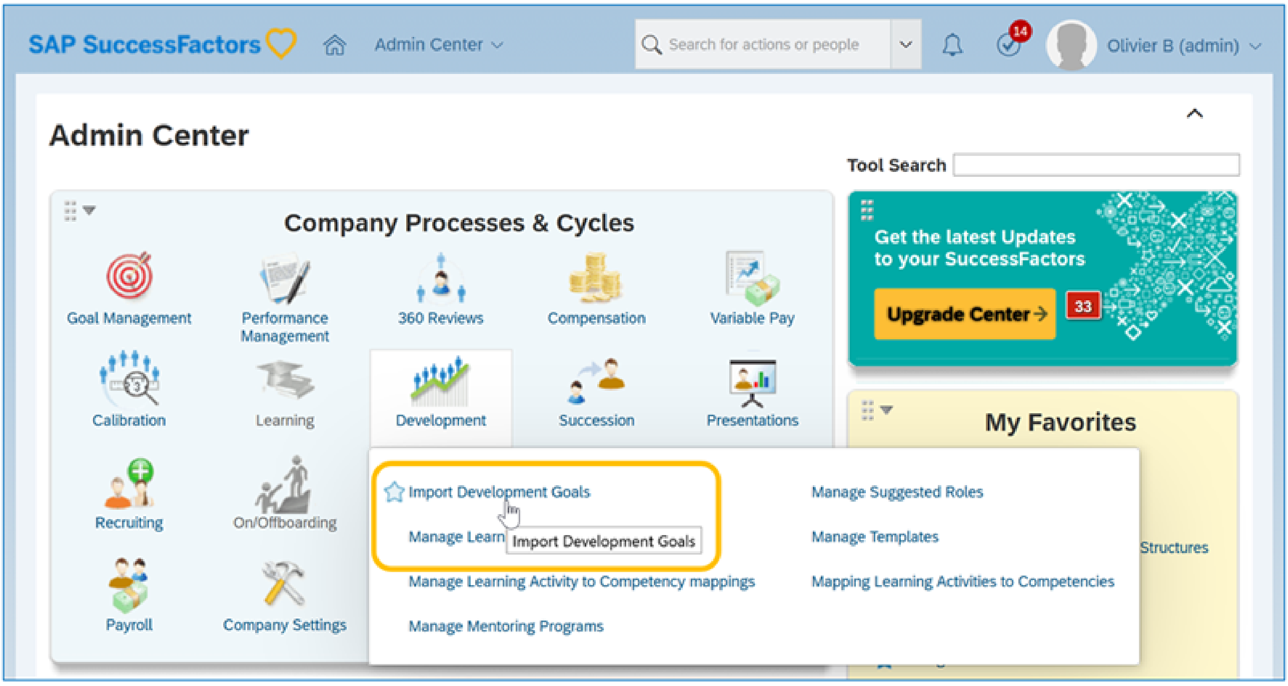


Now, you should see some permission options like **Import Learning Activity by web service** and **Import User Relationship for Learning Administrator and Educational**

Representative. These permissions are used to maintain the information shared or accessed in the integration.

Importing Development Goals with Learning Activities

When using the tool 'Import Development Goals', it is possible to download the csv template and complete it with development goals and learning activities.

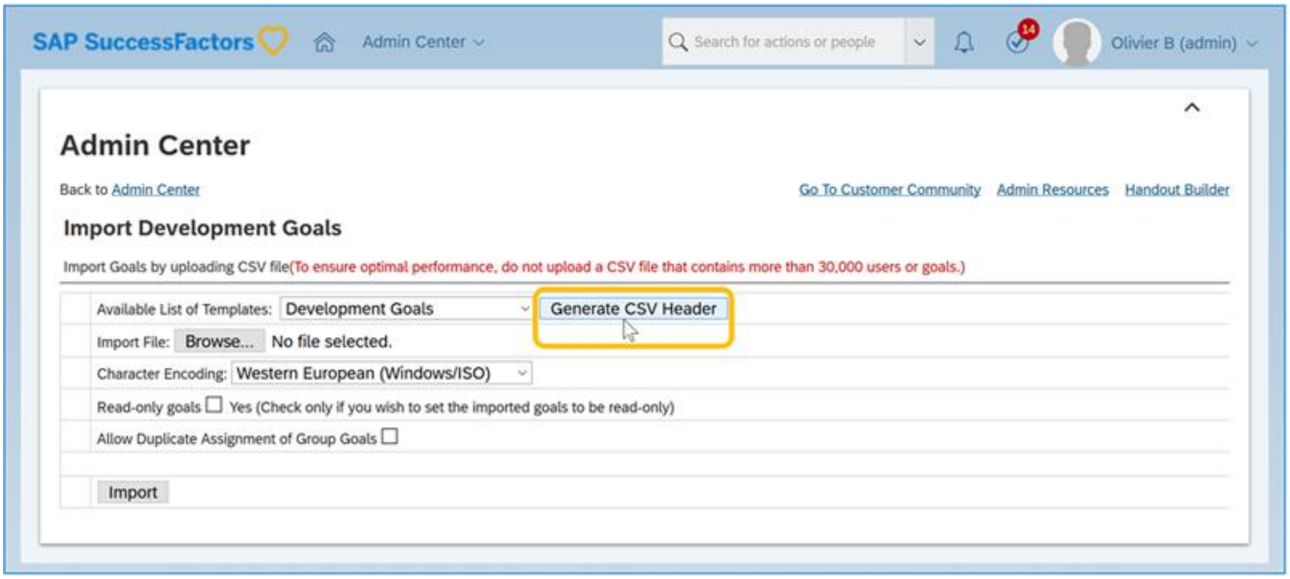


Importing learning activities with development goals is only available for customers that have enabled "Transcript" feature, which is the integration between CDP (Career Development Plan) and LMS (Learning Management System). This explains why customers who do not have the transcript enabled will see that development goals may be successfully imported but not the associated learning activities.

Moreover, it is only possible to add, update or delete custom learning activities. It is not possible to perform any actions on the learning activities from the LMS catalog.

Overview of the column content for the Import for Learning Activities:

- To import learning activities, the TYPE should be LEARNING
- GUID is the GUID of the goal and the SUBGUID is the GUID of the learning activity
- For the ADD action, leave SUBGUID, and the LEARNING_guid blank and the system will automatically generate a value
- You can add, delete and update all custom learning activities
- You cannot perform an add on a catalog learning activity



	Importing learning activities to a 'Completed Goal' will not work. You need to change the goal status to 'In Progress' or 'Not Started' and then import. If importing to a manually added goal, you can use the 'Goal ID' instead of the GUID. Manually added goals do not have GUIDs (only imported ones have it).

Lesson Conclusion - Additional Features in Admin Center

In this lesson, you were introduced to raise awareness of additional features after the integration between Career Development Planning (CDP) and Learning Management System (LMS) including the ability to import Learning Activities with Development Goals.

Lesson 6-3 - Learning Activities for non-LMS Customers

Lesson Overview

The goal for this lesson is to review the options about Learning Activities for non-SAP SuccessFactors LMS Customers.

Lesson Objective

- Describe options regarding Learning Activities for non-SAP SuccessFactors LMS Customers

Legacy Learning Activity Catalog for non-LMS Customers

The Legacy Learning Activity Catalog is represented in CDP as a listing of the learning activities (courses, books, job aids, video, instructor led training, etc.) that employees can associate with development goals. Typically learning activities are managed by a third-party Learning Management System (LMS).

The Learning Activity Catalog in SAP SuccessFactors is created and managed via an imported flat file. The import file includes a definition for the catalog itself and the learning activities included within a catalog. The file is imported in comma separated (CSV) format in Admin Center.

Integration Concerns between CDP and SAP SuccessFactors LMS

An instance cannot have both the integration between CDP and SAP SuccessFactors LMS where the users can add learning items in the LMS directly from CDP, and at the same time a Legacy Learning Activity catalog for the custom Learning Activities. This is not a supported configuration option. The two types of learning activities, integrated and legacy, are not designed to work together. The SAP SuccessFactors LMS has its own learning catalog.

There is an important note for customers who plan to use legacy learning activities and implement SAP SuccessFactors LMS at a later stage. If the transcript feature (LMS integration) is turned on, the legacy Learning activities are not visible any longer. The legacy learning activities are not deleted/lost when the transcript feature is turned on. If the transcript feature is disabled, the legacy learning activities reappear (if using the same/original learning activities template).

Therefore, if a customer has SF LMS on their roadmap for implementation and wants to integrate SF LMS learning with CDP learning activities, then it is not recommended to enable the legacy learning activities in CDP. Once LMS is implemented (or during the LMS implementation), then the SF LMS integrated learning activities within CDP should be implemented.

Scope of the Learning Activity Catalog

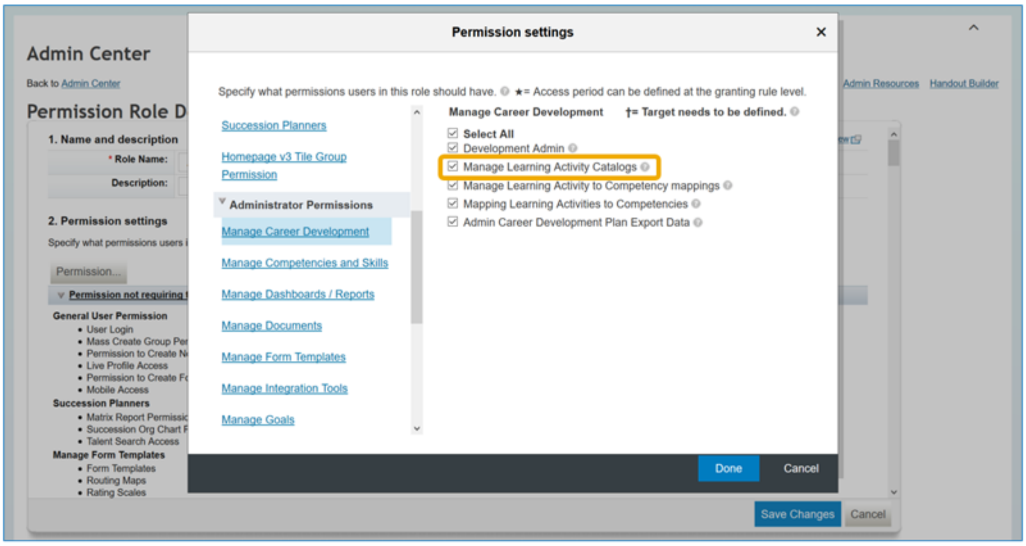
The Learning Activity Catalog import file described here allows to display, search, and in some cases launch learning activities associated with development goals.

- The catalog is defined by a numeric identifier and a name
- The catalog contains learning activities that are described by:
  - Globally unique numeric identifier
  - Descriptive text
  - Asset or content locale
  - Asset or activity type
  - Detail or launch URL
  - Identifier of the catalog this learning activity is included in
  - Whether the activity is active or inactive
- The entire catalog is available to all users who can create Development Goals
- The catalog is a single level structure (no hierarchies or categories/sub-categories)

- The catalog supports optional fields that can be used to describe additional learning activity attributes

Create a Legacy Learning Activity Catalog

The permission to manage learning activity catalogs can be found in Role-Based Permissions.



The catalog is created by importing the Learning Activity CSV file in Admin Center. Navigate to Admin Center > Development > Manage Learning Activity Catalogs.

From here you can:

- View available catalogs
- Import a new catalog
- Export an existing catalog
- Delete an existing catalog

Although multiple catalogs can be specified in a single import file, it is recommended that each import file only reference a single learning catalog.

For organizations that use competencies, Learning Activities must be mapped to competencies. To complete the linkage, there also needs to be a mapping for jobs to competencies. If competencies are specified with a development goal, the system can then initially display a subset of Learning Activities (those matching the competencies) when adding a learning activity to a development goal.

Update the Legacy Learning Activity Catalog

Any update must include the complete Learning Activity Catalog. Partial or incremental updates of Learning Activity Catalogs are not supported. Learning Activities are deleted from the Catalog if they are not specified in the import file.

Learning Activities are updated based on the learning activity GUID. If the GUID exists, the Learning Activity is updated according to the import file (any of the Learning Activity fields can be updated – name, description, URL, etc). If the GUID does not exist, a new Learning Activity is created within the catalog.

When updating a Learning Activity Catalog, we recommend first backing up the existing Learning Activity Catalog by exporting the active catalog then importing the new catalog file.

Updates to the learning activity catalog do not affect those learning activities already assigned on a Development Plan.

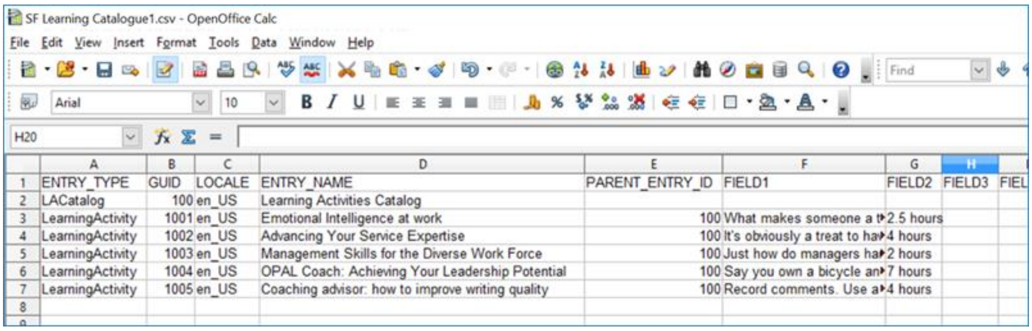
Legacy Learning Activity Catalog Restrictions

There are a few restrictions regarding the Legacy Learning Activity Catalog to keep in mind:

- SAP SuccessFactors supports multiple learning activity catalogs. The most common use of multiple catalogs is to support catalogs for different locales. Each development plan can only be associated with one learning activity catalog.
- Any user who has permission to Add Learning Activities to a Development Goal can access the entire Learning Activity Catalog (all or nothing). It is not possible to restrict parts of the catalog for access by subsets of users.
- The Learning Activity Catalog does not support hierarchies; it is a flat, single level collection of learning activities. The Catalog does not support the ability to specify categories and/or sub-categories to hierarchically organize learning activities libraries.
- GUIDs must be unique across learning activity catalogs and goal.

Legacy Learning Activity Catalog Import File

The import file format is CSV and should include the columns with a header row specifying the column names as in the 'Name' column.



	A	B	C	D	E	F	G	H	
1	ENTRY_TYPE	GUID	LOCALE	ENTRY_NAME	PARENT_ENTRY_ID	FIELD1	FIELD2	FIELD3	FIEL
2	LACatalog	100	en_US	Learning Activities Catalog					
3	LearningActivity	1001	en_US	Emotional Intelligence at work	100	What makes someone a t	2.5 hours		
4	LearningActivity	1002	en_US	Advancing Your Service Expertise	100	It's obviously a treat to ha	4 hours		
5	LearningActivity	1003	en_US	Management Skills for the Diverse Work Force	100	Just how do managers ha	2 hours		
6	LearningActivity	1004	en_US	OPAL Coach: Achieving Your Leadership Potential	100	Say you own a bicycle an	7 hours		
7	LearningActivity	1005	en_US	Coaching advisor: how to improve writing quality	100	Record comments. Use a	4 hours		
8									

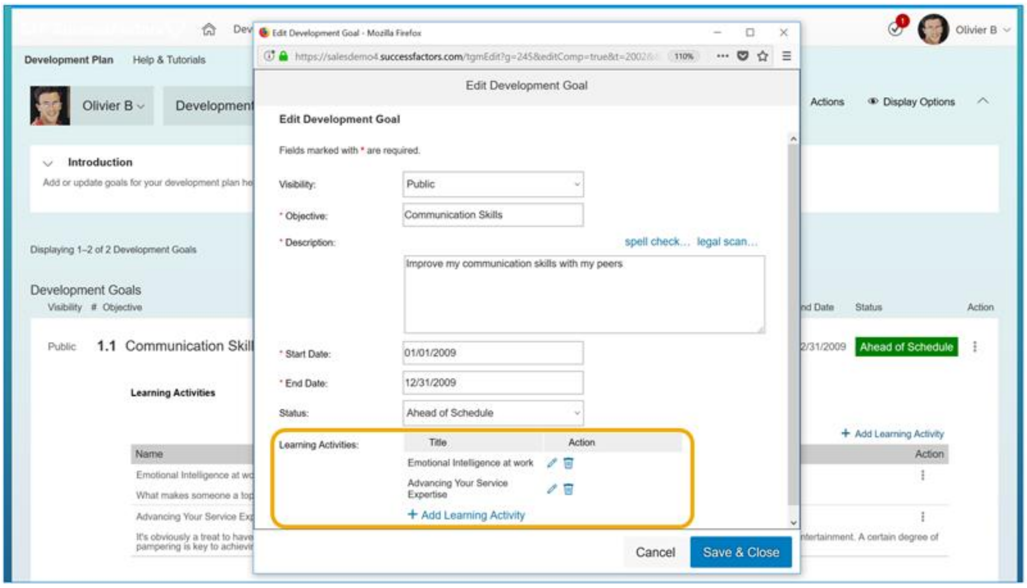
Common CSV formatting rules apply. For example, text strings that include commas must be surrounded by double quotes (""), and quotes within text strings should be escaped by doubling them.

Mapping the Legacy Learning Activity Catalog CSV File

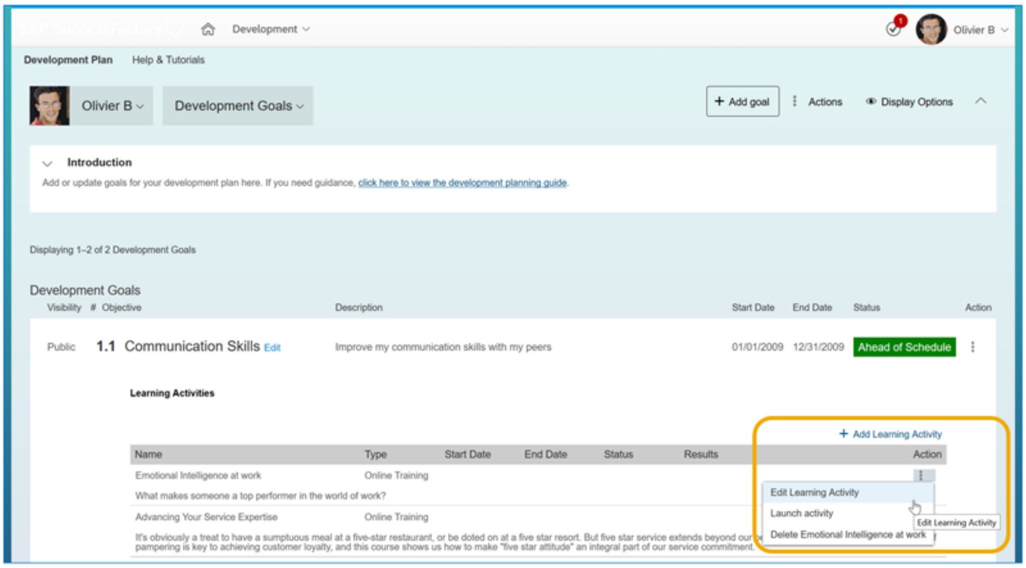
For end users to use the Legacy Learning Activity Catalog, the GUID catalog defined in the CSV file has to be mapped in the Learning Activities Template XML. This is therefore an action for the implementation consultant or someone who has access to the back-end of the application.

End User View for Legacy Learning Activities

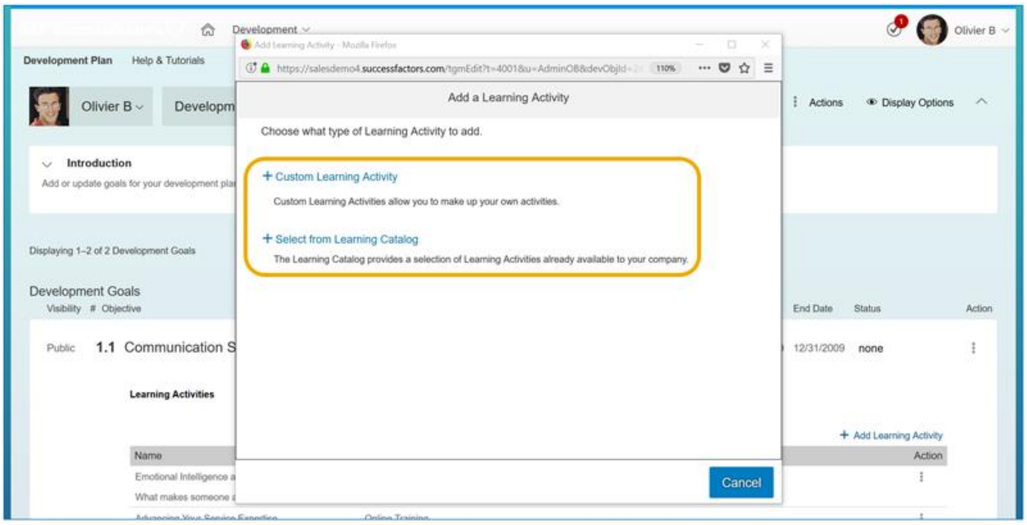
End users can go to their development plan and create or edit a new goal. In the goal pop up window, after the last field, they will be able to add a learning activity or edit and delete existing ones connected to this goal.



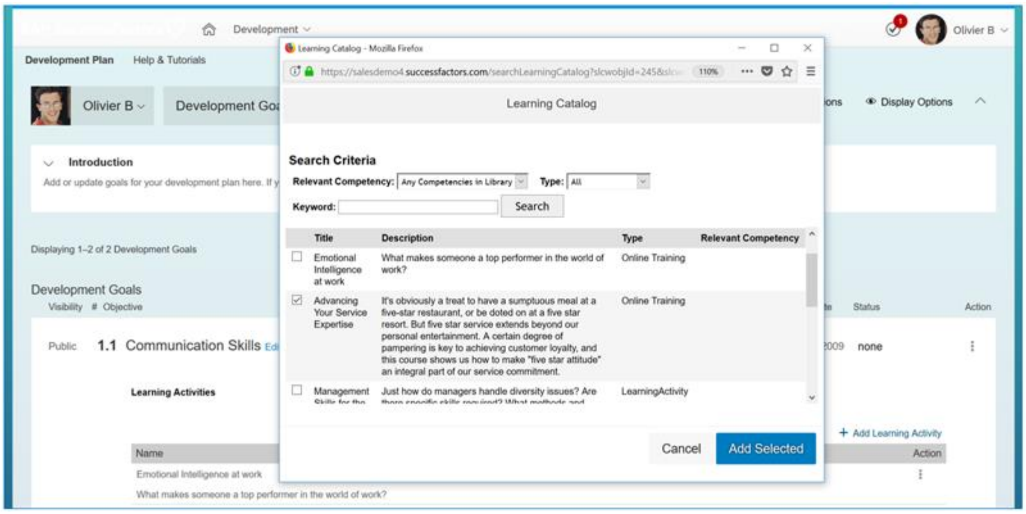
The same options also exist directly from the development plan so that end users do not have to edit existing goals to make changes to the learning activities or to add a new one.



When we click on Add Learning Activity from either places the development plan or the goal pop up window, we can choose between a Custom Learning Activity or to Select from Learning Catalog.



When selecting from the legacy catalog, there will be different search criteria available. End users will be able to search by competency if a mapping exist, by type or by keyword. They can also directly click the button Search without selecting any criteria to display all the learning activities available in the catalog. They can just check the box corresponding to the learning activity they want to add and they can click on the button Add Selected.

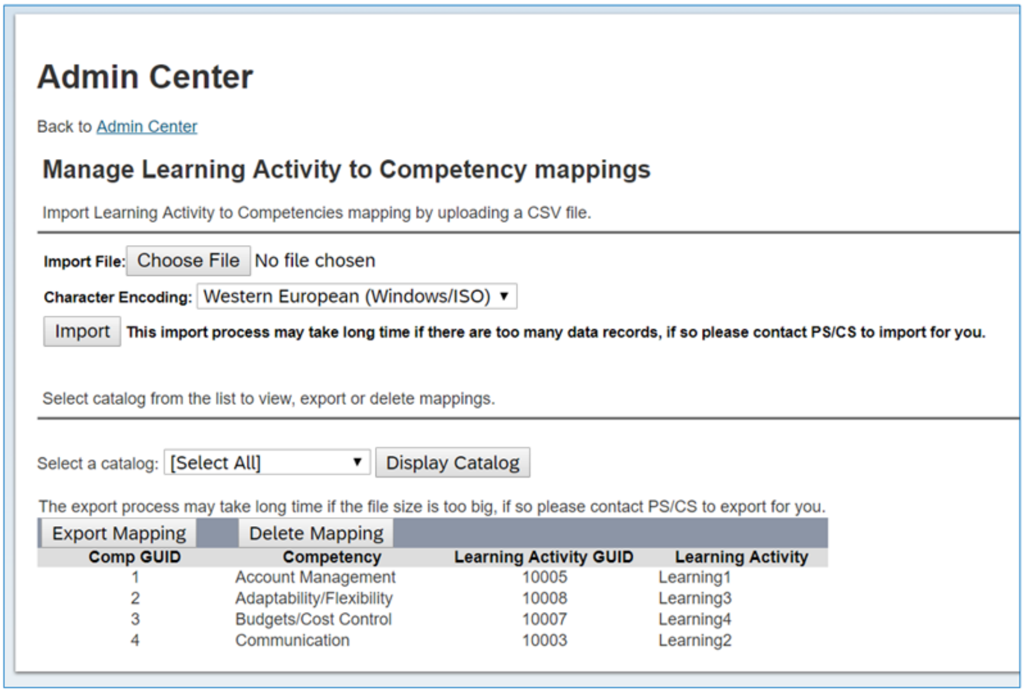


Learning Activities Mapped With Competencies

It is possible to map learning activities to competencies. You can use a csv file. It can be imported from Admin Center > Development > Manage Learning Activity to Competency mappings. This file includes:

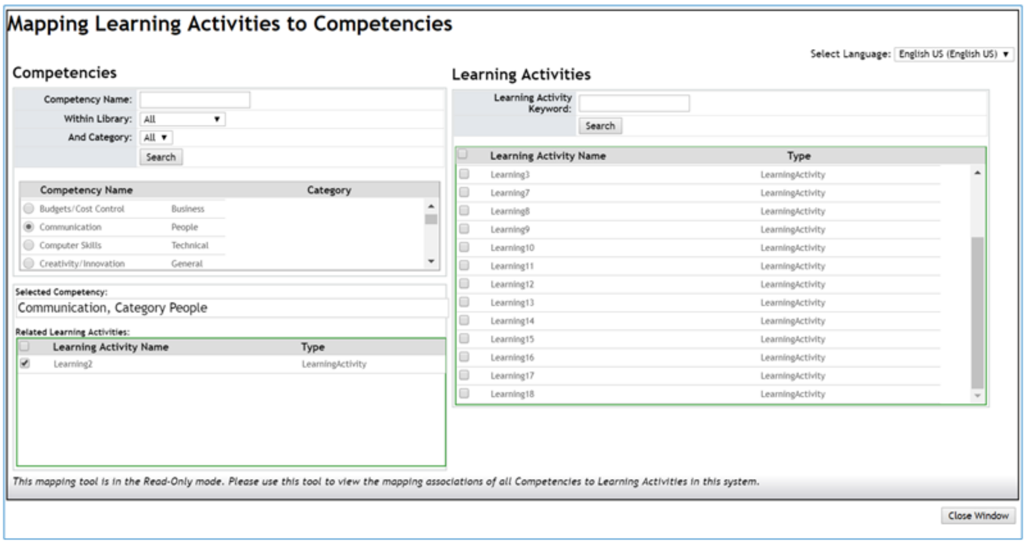
- COMPETENCY_GUID: it can be visible in the competency library
- ENTRY_ID: the GUID of the learning activity defined in the learning catalog
- ENTRY_TYPE: this is always 1

Existing mapping can be exported or deleted.



> If you are replacing an existing mapping, you should delete the mapping before performing the import. It is also recommended to export the mapping and saving the file as a back-up before making any changes.

You can also review the mapping associations of all Competencies to Learning Activities in the system. Go to Admin Center > Development > Mapping Learning Activities to Competencies.



Learning Activities to an External LMS

Learning activities can optionally include a field containing a URL that links to a course delivery or registration page within an external Learning Management System. Including the URL field is designed an external Learning Management System integration but it can also support linking to an external site or a company intranet.

This field has to be added in the Learning Activity Template from the back-end of the instance. Once configured, this field is populated from the catalog and hidden from the user, so it is not necessary to add it to the read or write field permissions. As long as the catalog contains URLs that populate the goto-url field, an icon will appear in the development plan and will link to the specified URL.

Lesson Conclusion - Learning Activities for non-LMS Customers

In this lesson, you were introduced to the options about Learning Activities for non-SAP SuccessFactors LMS Customers.

Unit Wrap-Up

In this unit, you covered:

- Lesson 6-1: Integration of CDP and LMS

- Lesson 6-2: Additional Features in Admin Center
- Lesson 6-3: Learning Activities for non-LMS Customers

You should now be able to:

- Approach needed integrate CDP and LMS
- Features appearing in Admin Center after Integration
- Describe options regarding Learning Activities for non-SAP SuccessFactors LMS Customers

Unit 7 - Mentoring Programs

Unit Objectives

This unit contains general lessons about Mentoring:

- Lesson 7-1: Activation of the Mentoring Features
- Lesson 7-2: Role-Based Permissions for Mentoring
- Lesson 7-3: Creating, Managing, and Archiving Mentoring Programs
- Lesson 7-4: Matching Interaction for Supervised Programs
- Lesson 7-5: Program Experience of the Mentor/Mentee
- Lesson 7-6: Additional Materials for Mentoring

Upon completing this unit, you will be able to:

- Upgrade to the Mentoring Feature
- Grant Permissions to Access Mentoring
- Create and Manage a New Program
- Locate Additional Material for the Use of Mentoring

Lesson 7-1 - Activation of the Mentoring Features

Lesson Overview

The goal for this lesson is to discuss the activation of the Mentoring features.

Lesson Objective

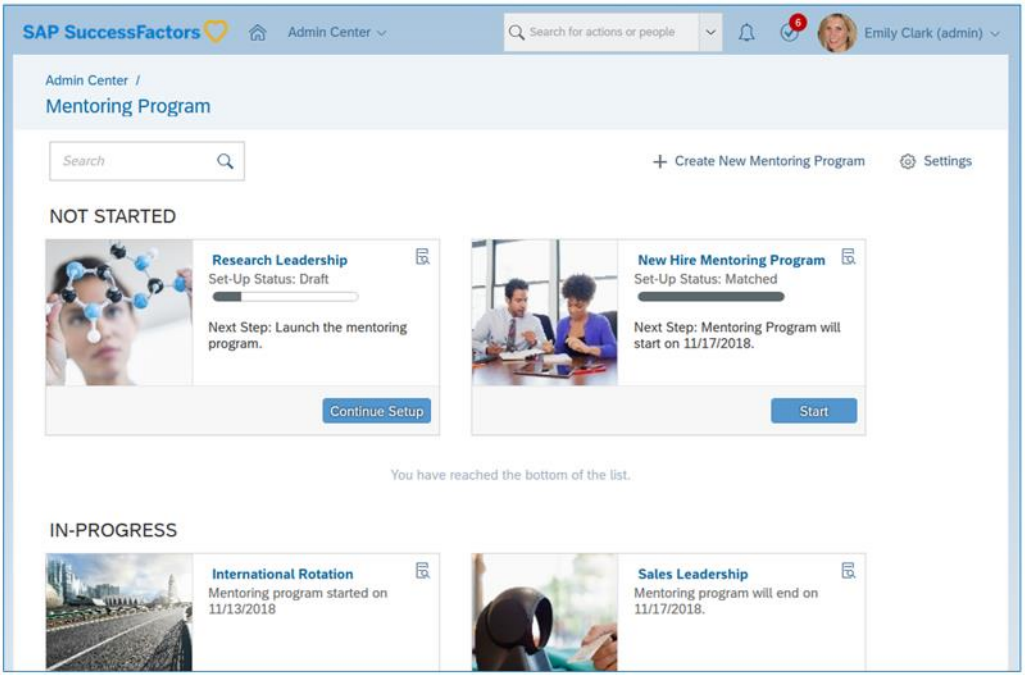
- Identify the next steps to use Mentoring

What is Mentoring and how can I Activate its Features?

The Mentoring solution from SAP SuccessFactors provides you with a central and integrated tool to set up and run programs to manage your organization's structured mentoring relationships. It provides you with a framework for your development program management and can be applied to your leadership development, coaching, enablement, or job shadowing programs, just to name a few:

- Mentoring is partnering with a more experienced colleague to enhance knowledge, skills and self-awareness in a certain area.
- The mentor supports the employee by giving advice based on own experiences or other structured ways to transfer knowledge.
- Now through Career Development Planning, you can formalize your mentoring process by using the program wizard to identify details, determine mentor and mentee groups, and set timelines for each individual program.

- Mentoring supports the creation and administration of mentoring programs, with automated recommendations & matching.

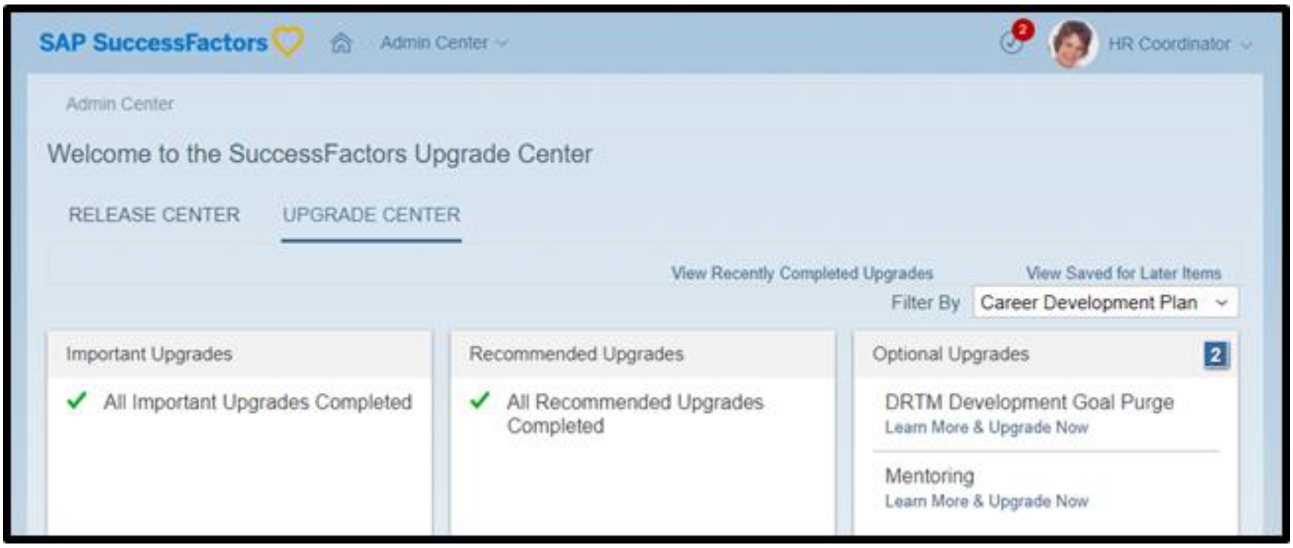


In order to use this feature, you must utilize the Metadata Framework (which is also called Generic Object), Role-Based Permissions, and the Attachment Manager.

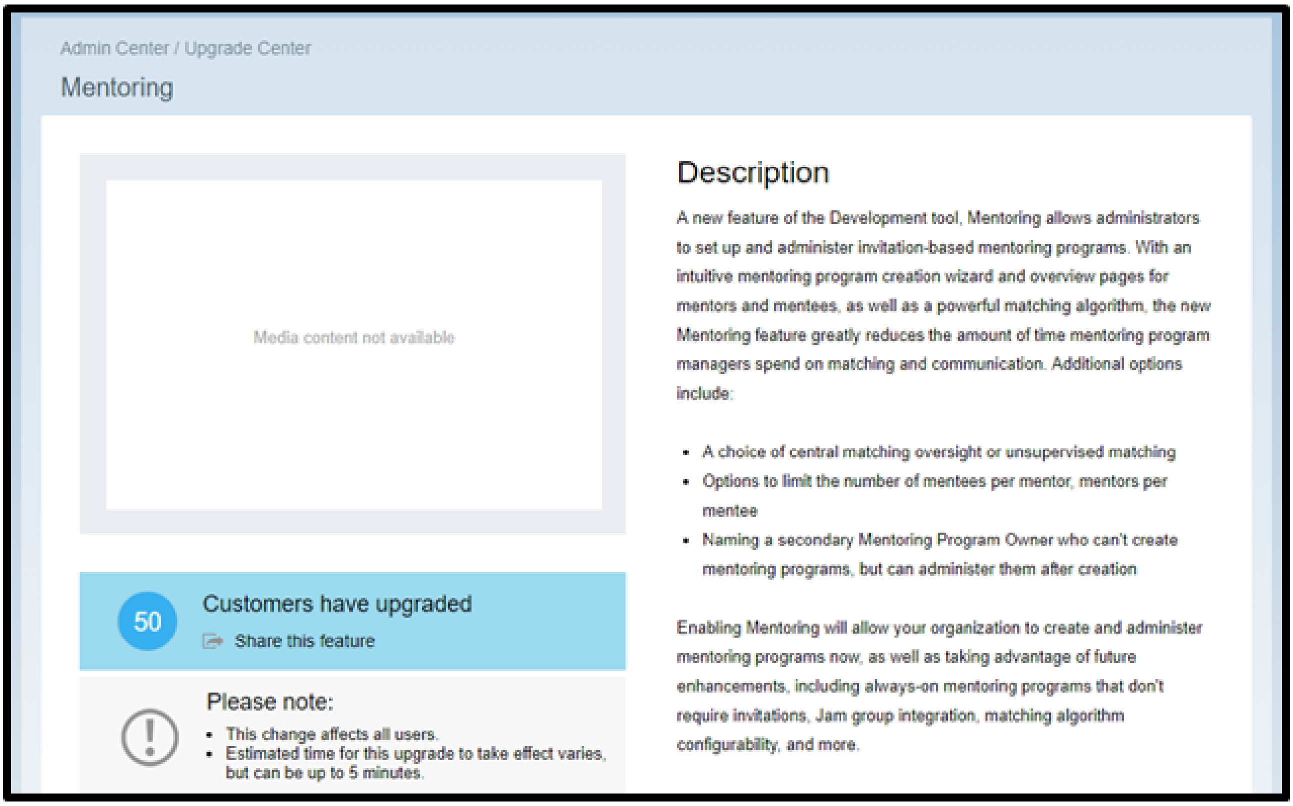
Mentoring can now be activated through the Upgrade Center within your instance if you have Administrator privileges.

To enable Mentoring via the Upgrade Center, do the following:

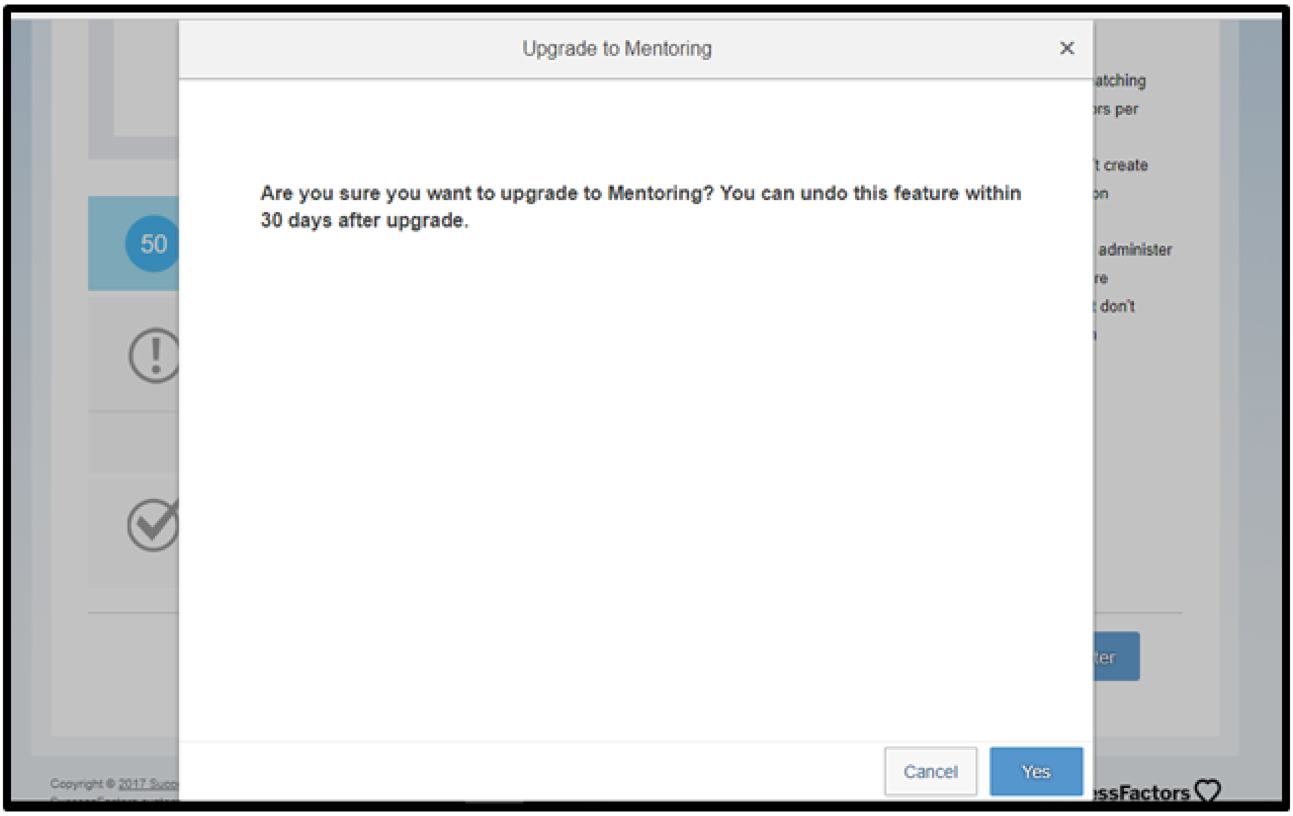
1. Login to your instance
2. Go to Admin Center
3. Go to the Upgrade Center
4. Filter on Career Development Plan
5. Select Learn More & Upgrade Now under Mentoring



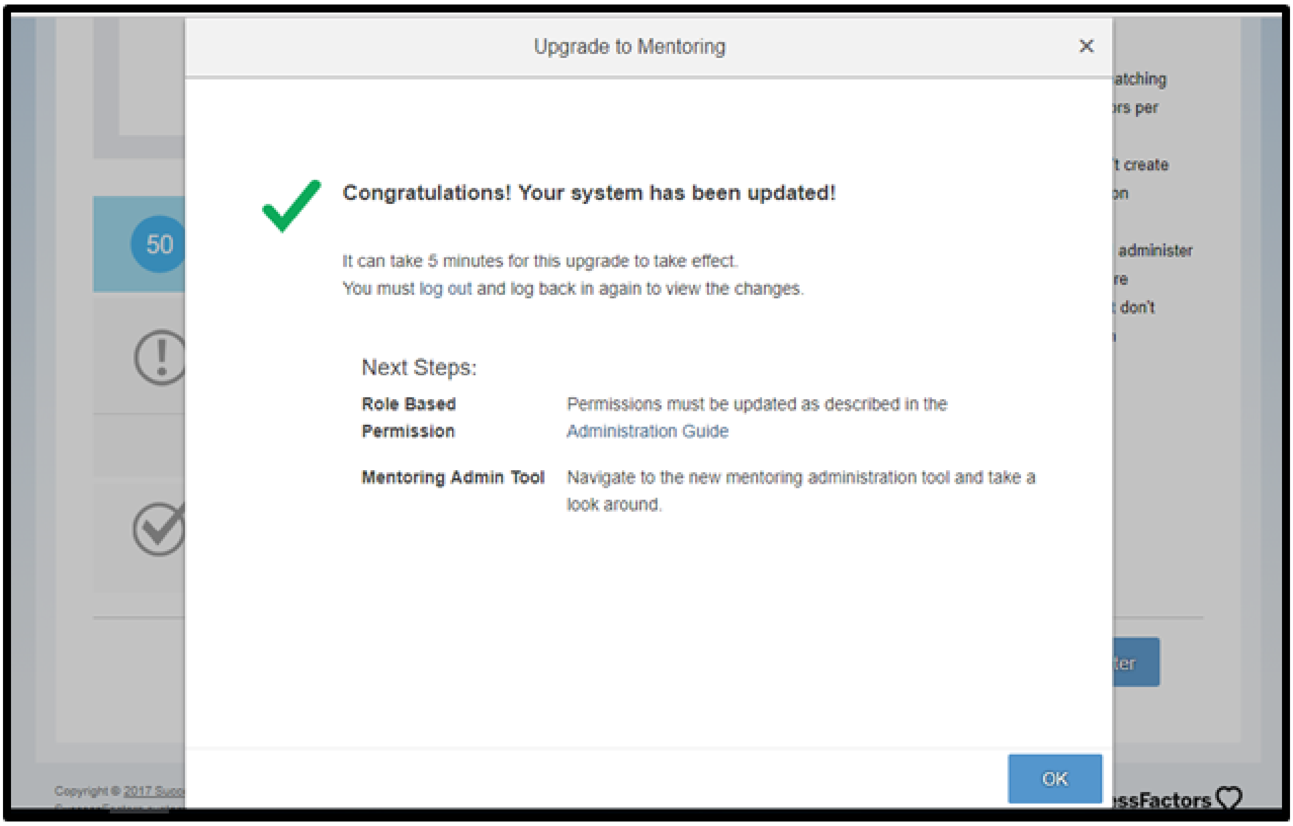
Review the description and select Upgrade Now at the bottom of the page



You will see a message to confirm that you want to upgrade to Mentoring and you can select Yes.



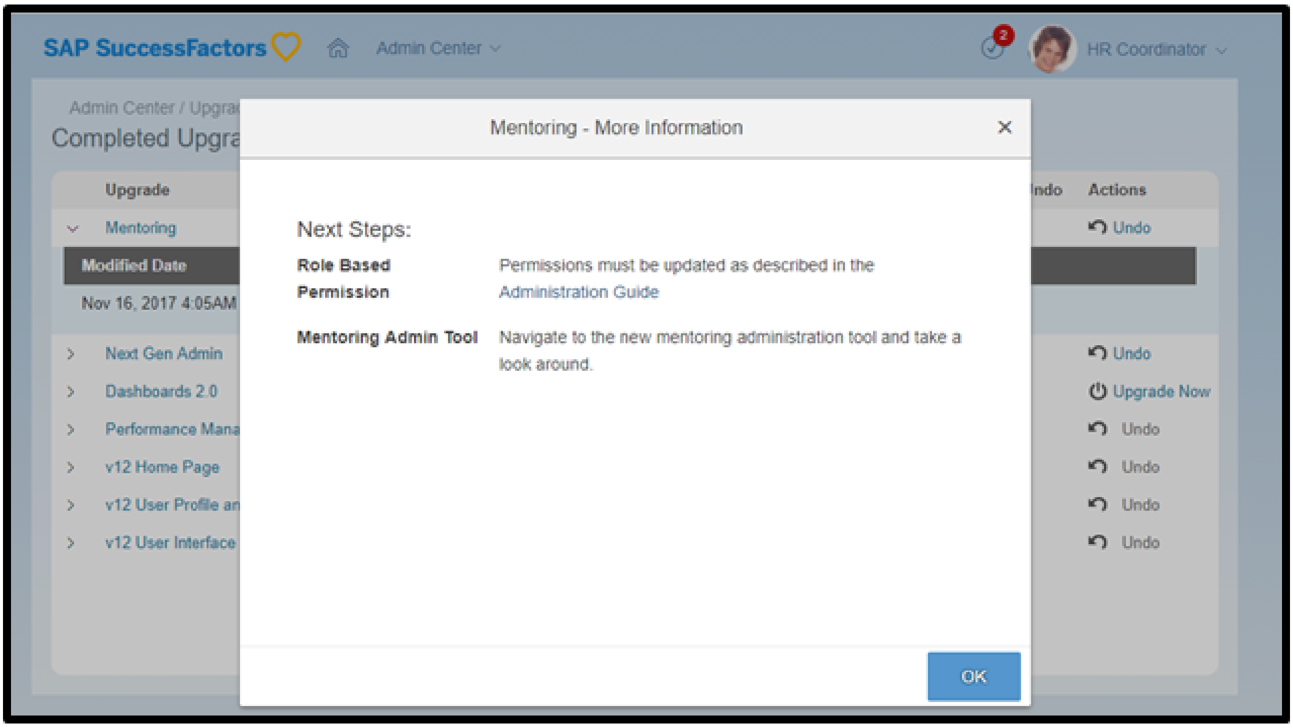
If your upgrade is successful, you should see the following message as in this screenshot and you can select OK.



***Be sure to allow five minutes for the changes to take effect. Logout and back in again to view the changes.*

Next Steps after Upgrade Center

1. Log back into instance
2. Go to Admin Center
3. Select Upgrade Center and then on View recently completed upgrades
4. Find Mentoring and select View Next Steps



Now, you have two final steps to move forward with Mentoring:

1. Give yourself the proper permissions to view the Mentoring options
2. Setup Mentoring within Admin Center > Development

Lesson Conclusion - Activation of the Mentoring Features

In this lesson, you were introduced to the steps involved in the activation of Mentoring features.

Lesson 7-2 - Role-Based Permissions for Mentoring

Lesson Overview

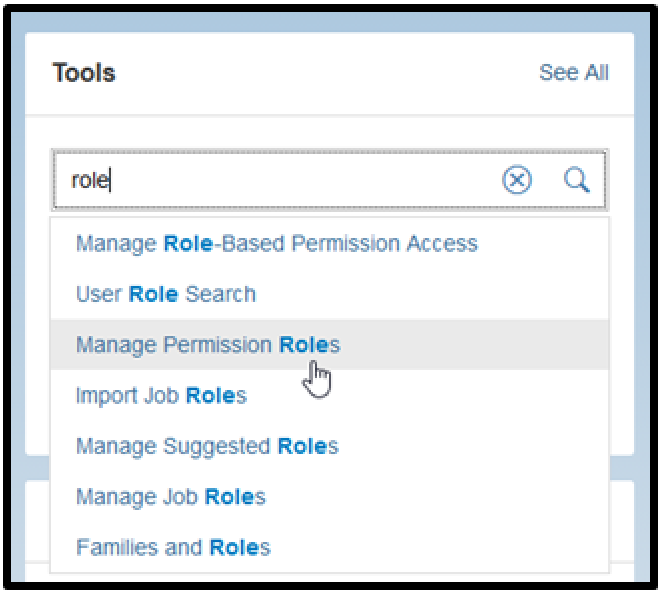
The goal for this lesson is to show the necessary permissions for Mentoring.

Lesson Objective

- Identify the specific permissions to enable within Admin Center

What Permissions are Needed to Utilize Mentoring?

Assign the role-based permissions necessary for all mentoring administrators. Using Action Search, locate Manage Permission Roles and select the role.



Under the Administrator Permissions section, select the following:

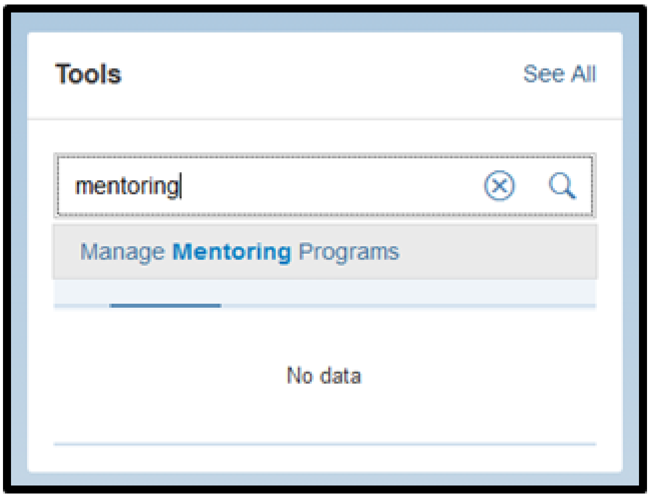
- Manage Career Development > Manage Mentoring Programs
- Manage Integration Tools> Allow Admin to Access OData API through Basic Authentication
- Metadata Framework > Access to non-secured objects (previously known as 'Read/Write Permission on Metadata Framework')
- Manage User > Manage Employee Dynamic Groups

Still for the Administrator role, go to the User Permission section and select the following:

- Career Development Planning > Mentoring Programs Access Permission (this permission provides access to the Mentoring tab under Development)
- Employee Data > First Name > View
- Employee Data > Last Name > View
- General User Permission > Company Info Access > User Search (this permission allows users to search mentees and mentors)

	You can restrict mentor and mentee searches by setting a target population.

Once the appropriate Administrator Permissions are granted the Manage Mentoring Programs option should be available in Admin Center.



	After enabling Mentoring and giving the required permissions, an application error may appear when you go to Manage Mentoring Programs in Admin Center. CAUSE: This application error happens because the MDF (Metadata-Framework) cache still has not been refreshed and the MDF objects required by Mentoring are still not active. RESOLUTION: After some time, the MDF cache will refresh and the MDF objects required by Mentoring will be active. Please wait up to 24 hours for this to happen. If you are still facing the issue after 24 hours, please contact support, including the error information and the version information of your current screen.

Now, the proper permissions are ready for the Administrator and End User role to journey through the Mentoring program wizards.

Lesson Conclusion - Role-Based Permissions for Mentoring

In this lesson, you were introduced to the permissions needed to utilize Mentoring.

Lesson 7-3 - Creating, Managing, and Archiving Mentoring Programs

Lesson Overview

The goal for this lesson is to create a new mentoring program from Admin Center.

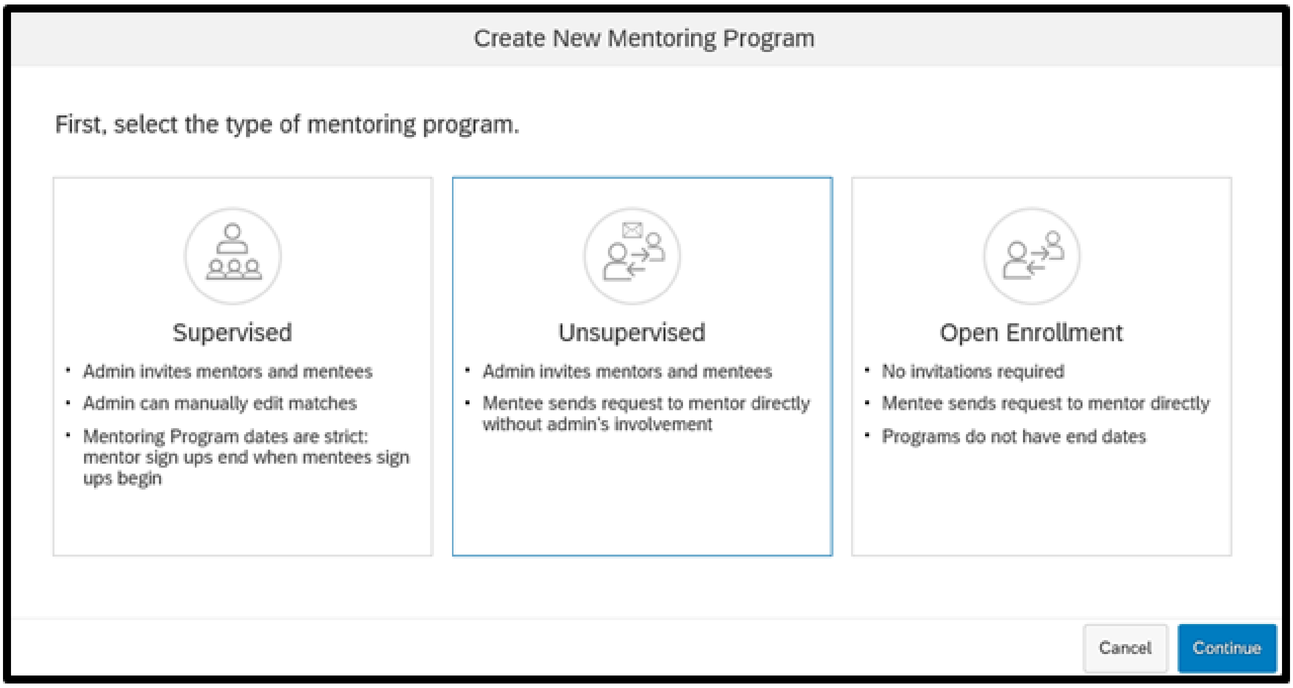
Lesson Objectives

- Demonstrate the creation of new mentoring program using the setup wizard
- Define open enrollment mentoring programs and how to validate mentors

How do I build a Mentoring Program as an Administrator?

To create a program, navigate to Admin Center > Development and select Manage Mentoring Programs or use the Action Search by typing the name.

Select the type of Mentoring Program: Supervised, Unsupervised, or Open Enrollment. Open Enrollment is the most flexible mentoring program option. Unsupervised is semi-structured and Supervised is highly structured.

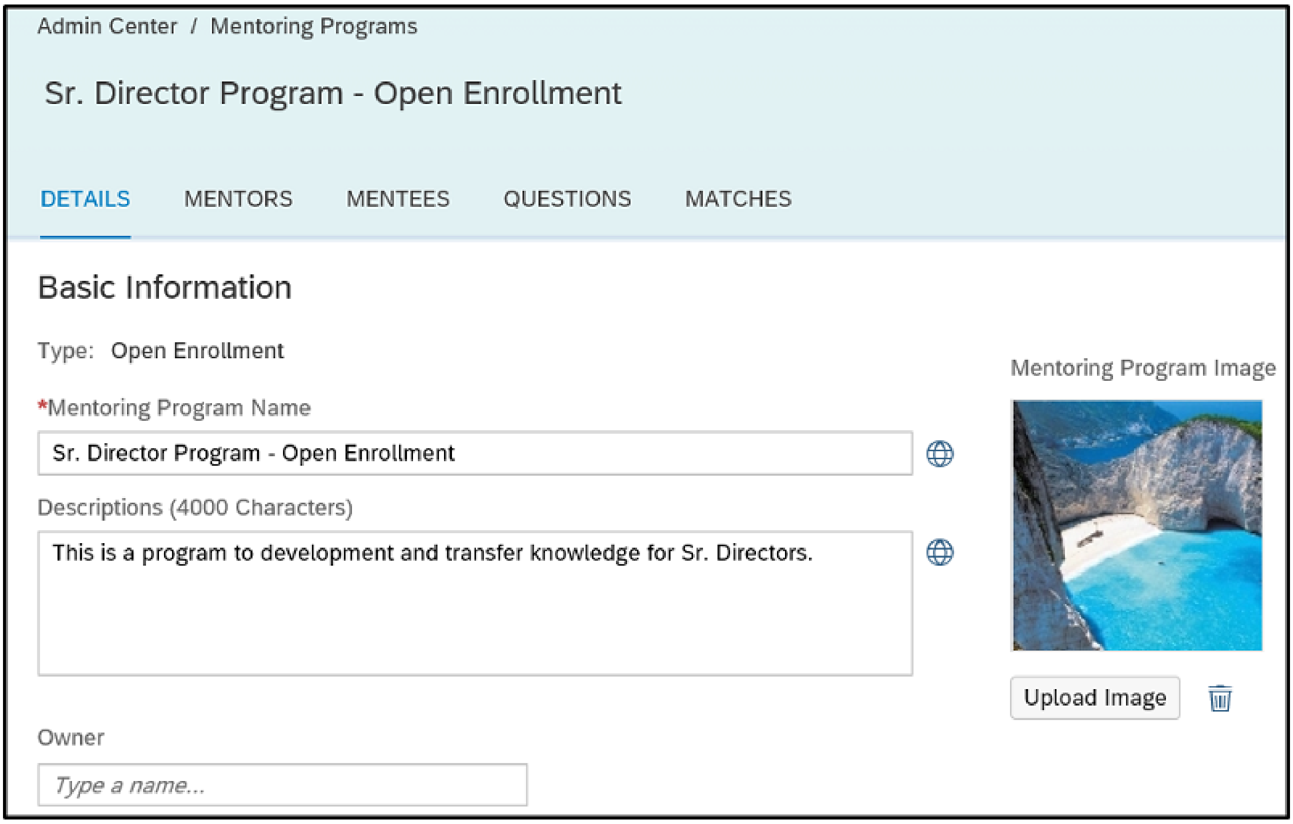


Depending on the program selected, the creation wizard may display varying information. Simply begin filling out the information necessary to your program such as:

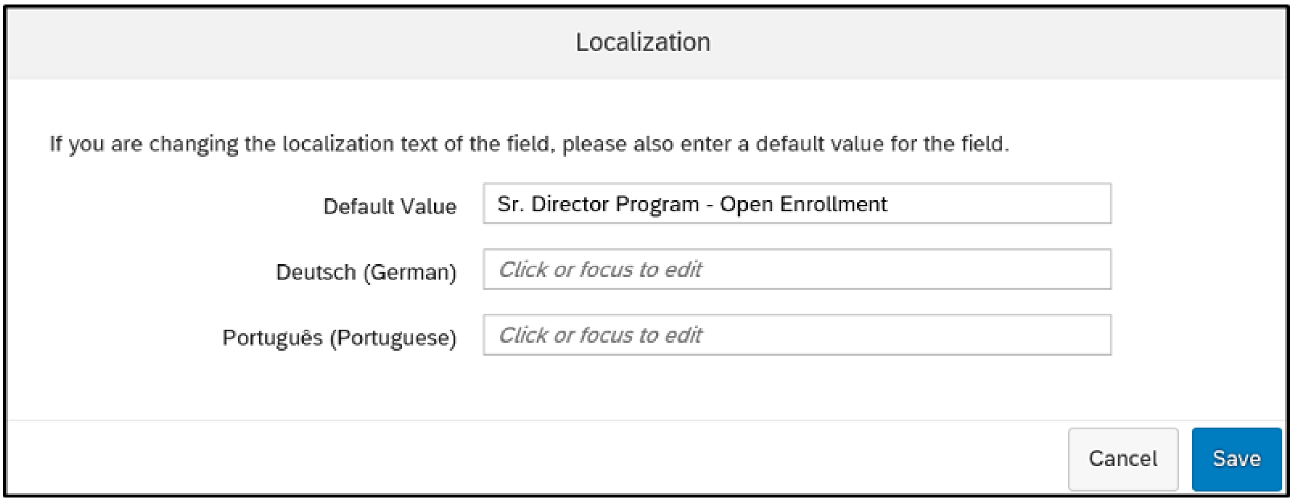
- Program name
- Program Description
- Program Owner

You can also brand your program and upload an image if you prefer.

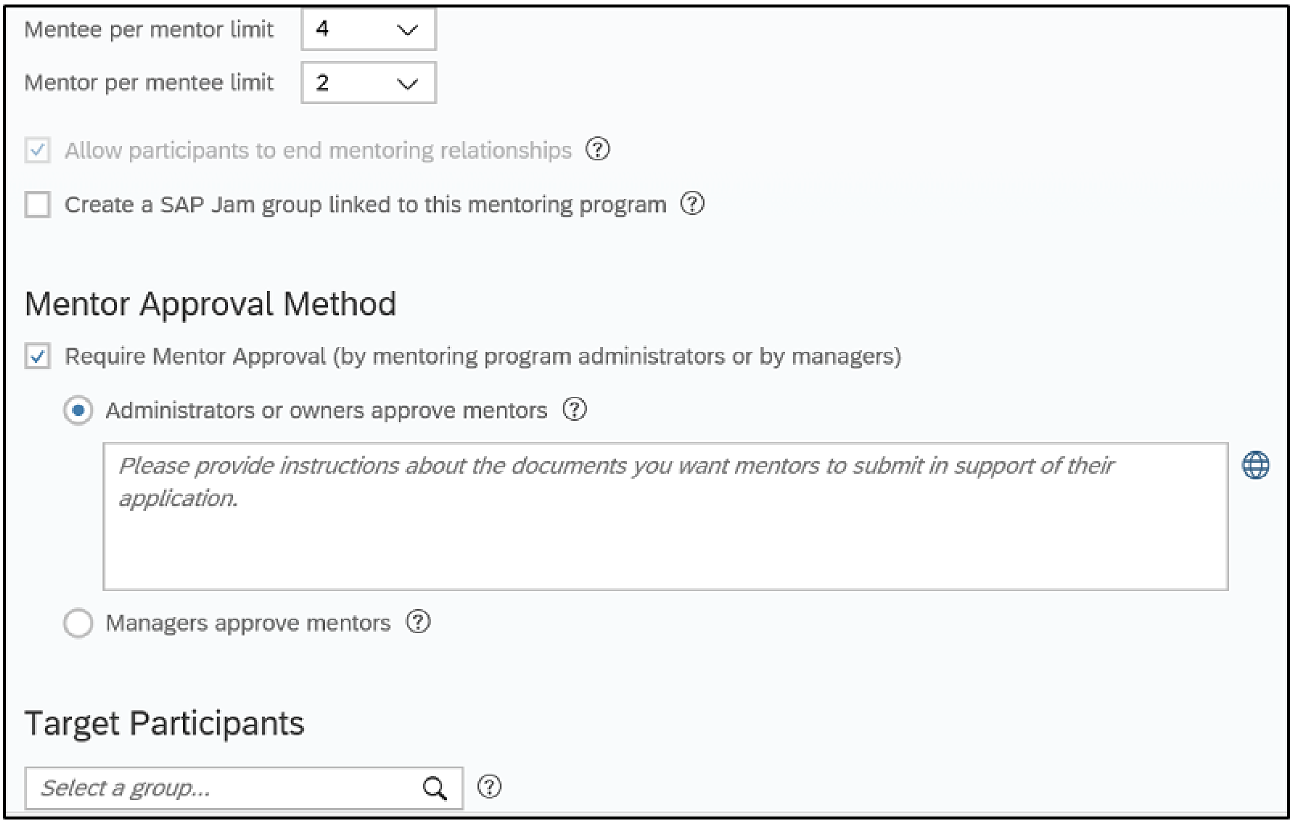
An example of an open enrollment program is as follows:



To access localization, click on the globe symbol to enter language translations. The languages enabled by your Professional Services consultant during implementation are the ones displayed. To access additional languages, you will need to consult Customer Support or Professional Services. Right to left translations are supported as well:



When a Mentoring Program Administrator defines the parameters within Manage Mentoring Programs, a maximum threshold of mentors and mentees determines the number of mentors per mentee or mentees per mentor allowed. These guidelines create a hard stop to the number of mentors or mentees a participant can have within this program.



Within this same area, you may activate additional feature options like:

- Allow participants to end mentoring relationships
- Create a SAP Jam group linked to this mentoring program
- Require Mentor Approval (by mentoring program administrators or by managers)
- Select a group of target participants (otherwise available to all employees)

Mentor / Mentee Limits

As a program is created or in-progress, admins and program owners can change the limits in program overview pages. In addition, when mentors sign up for a mentoring program, they can also adjust the number of mentees they wish to be paired with, up to the limit you've defined for the program.

In a specific mentoring program, a particular mentee can have more than one mentor. Similarly, a particular mentor can have more than one mentee.

Allow Participants to End Mentoring Relationships

If the “allow participants to end the mentoring relationship” is enabled, the system will adjusts the number allotted to create opportunities to continue accepting new relationships.

Also important to note: When creating an open enrollment mentoring program, this feature is automatically selected in order to facilitate either party ending the relationship. Since a program administrator performs a less active role in this type of program, the system allows the participates to drive the relationship. Relationships can end for reasons like a participant takes leave or cancels frequently on the other party.

Create a SAP Jam group linked to this mentoring program

Mentoring includes an integration with SAP Jam, allowing mentoring administrators to create SAP Jam groups when creating mentoring programs.

Requirements:

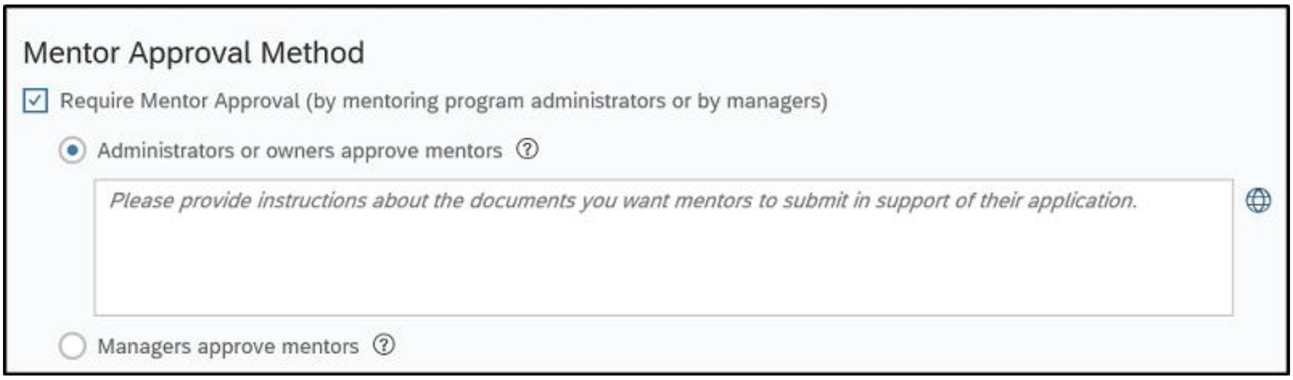
- You have SAP Jam enabled.
- You have SAP Jam Advanced Plus licenses for all users who participate in mentoring programs.
- You have SAP SuccessFactors Succession and Development licenses for all users who participate in mentoring programs.
- You have assigned SAP Jam Access role-based permissions to all users who participate in mentoring programs.

The integration with SAP Jam provides an additional platform for collaboration, training, and discussions. If the requirements are met, mentoring administrators have the option of creating a new SAP Jam group along with their mentoring program. The group inherits the mentoring program name unless a group with the same name already exists, then (and only then) the system gives you the option to edit the SAP Jam group name.

The SAP Jam group is created once you launch the mentoring program. The mentoring administrator and any mentoring program owners are then automatically invited to the group and added as group administrators. Then, once mentors and mentees are matched, they are also invited to the SAP Jam group. And finally, the SAP Jam group feed is displayed on the mentor and mentee overview pages for the mentoring program.

Require Mentor Approval

When utilizing the approval feature, several options are described below:



Option	Description
Mentors	Select your preferences and complete any free text fields. **Open Enrollment**: In open enrollment programs, your participation as a mentor may require approval by the program administrator or your manager. ◦ If administrator approval is required, upload supporting documentation with your mentor signup. The program admin or owner will review your documents and either accept or decline your participation. ◦ If manager approval is required, you will receive an e-mail notification once they approve or decline your participation.
Mentees	In addition to selecting general preferences, you can select a preferred mentor in the following ways: ◦ The **Show Recommended Mentors** button: When you choose the button, up to 10 available mentors are displayed. In the mentor card, you can view the mentor's profile information, mentoring preferences, and scoring items. Some signup form questions are defined as key questions by the program admin, and the recommended mentors are all qualified for matching in those questions, so the matching results of those questions are not displayed under **Scoring Items**. ◦ The **Search for a mentor** box: You can search for mentors by inputting username in the search box. The auto-complete function in the **Search for a mentor** box is removed, so you need to choose the "search" icon or use the Enter key to submit the search. Since the mentor you search for is not recommended by system matching, you can only view the mentor's profile information and mentoring preferences in the card.

Select a Group of Target Participants

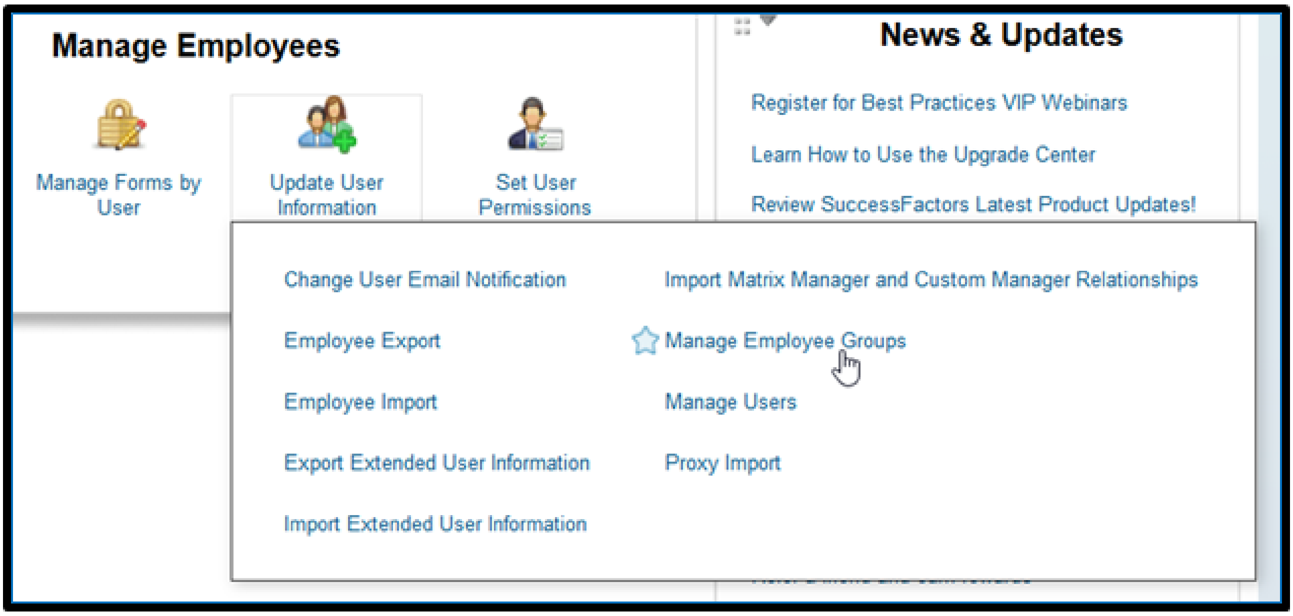
Adding mentors & mentees to a program can be accomplished one at a time or by central dynamic group.

You can add dynamic employee groups to mentoring programs to manage participants. For supervised and unsupervised programs, which send out invitations on a single date, the groups are a snapshot of the group members on the day the group is added to the program. For open enrollment programs, the dynamically-changing population of group members is applied. On any given day, a user who is a member of an assigned group can see and sign up for the open-enrollment program.

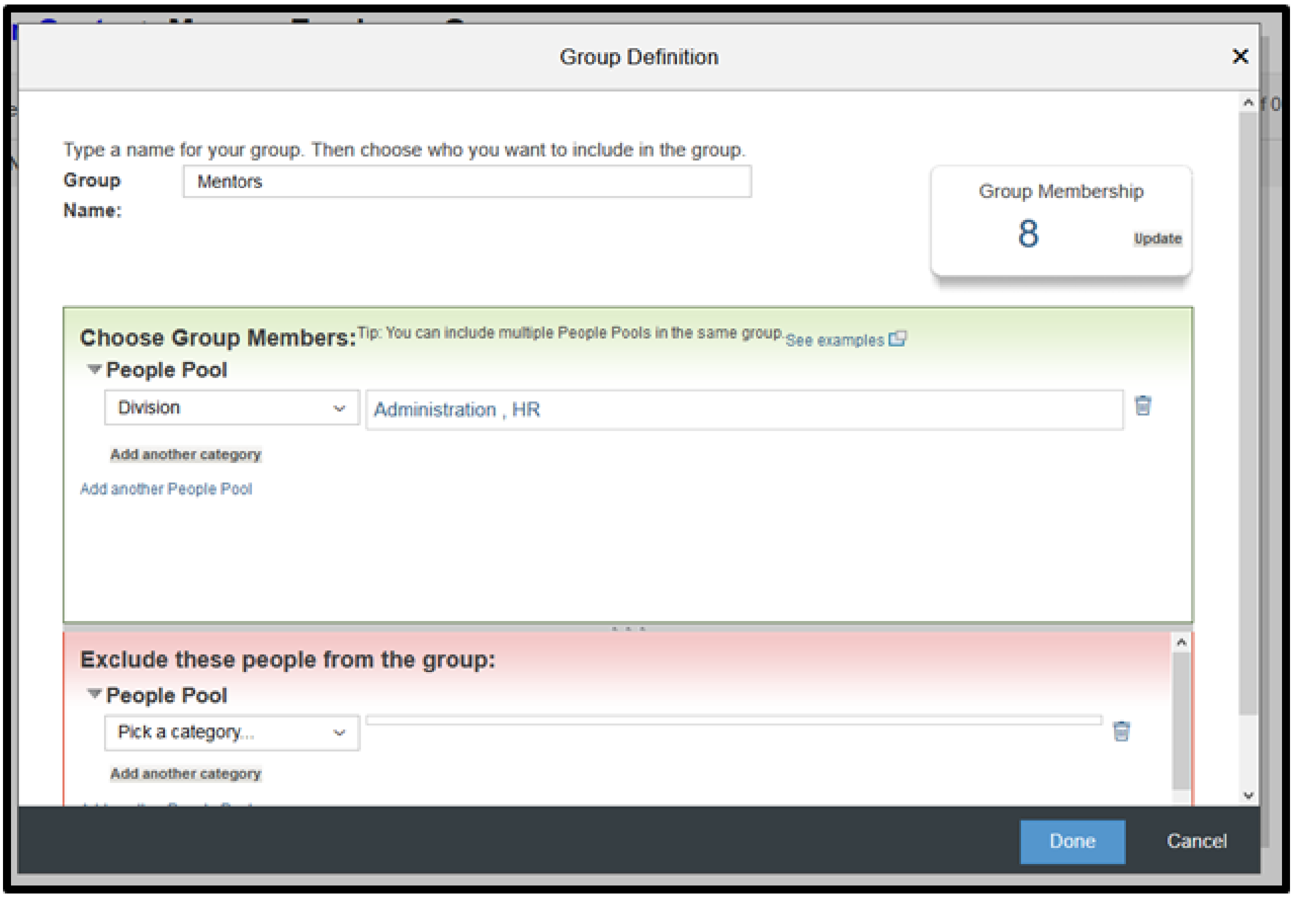
Creating Dynamic Groups

It is possible to create central dynamic groups for use across several mentoring programs. These groups can also be shared with multiple administrators. Static groups can also be created by CSV upload.

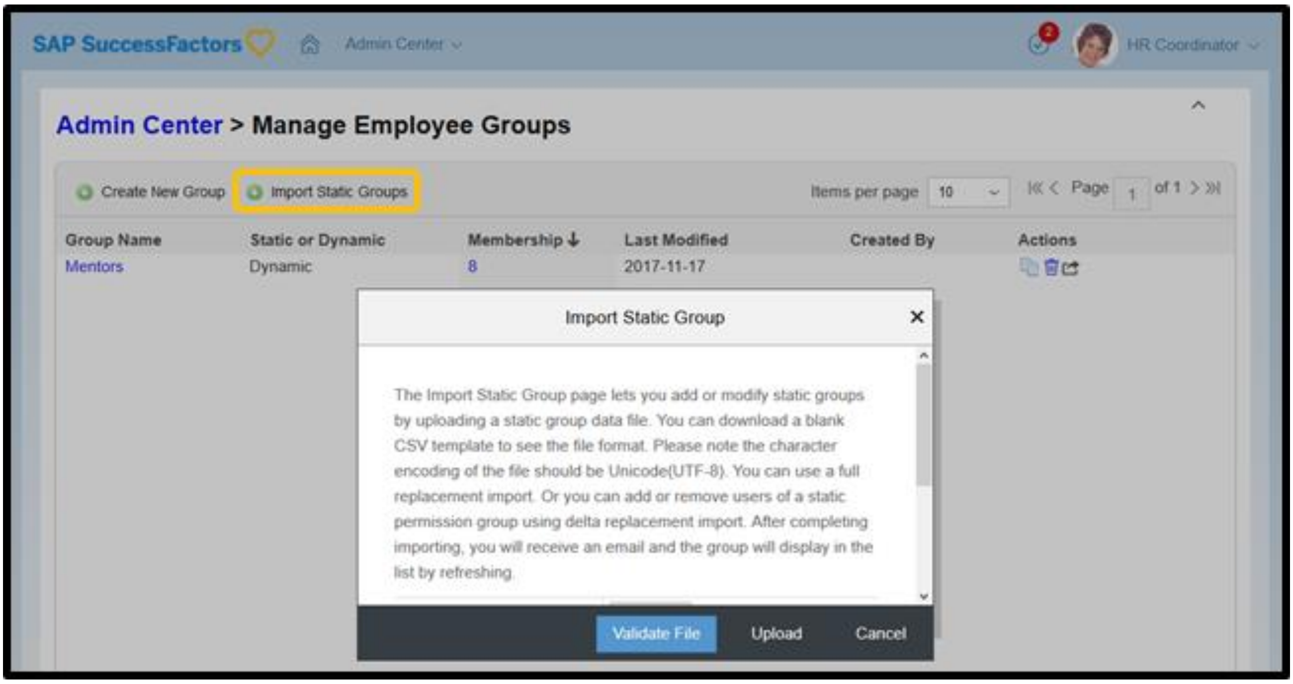
To create a central dynamic group, use the Action Search to locate Manage Employee Groups..



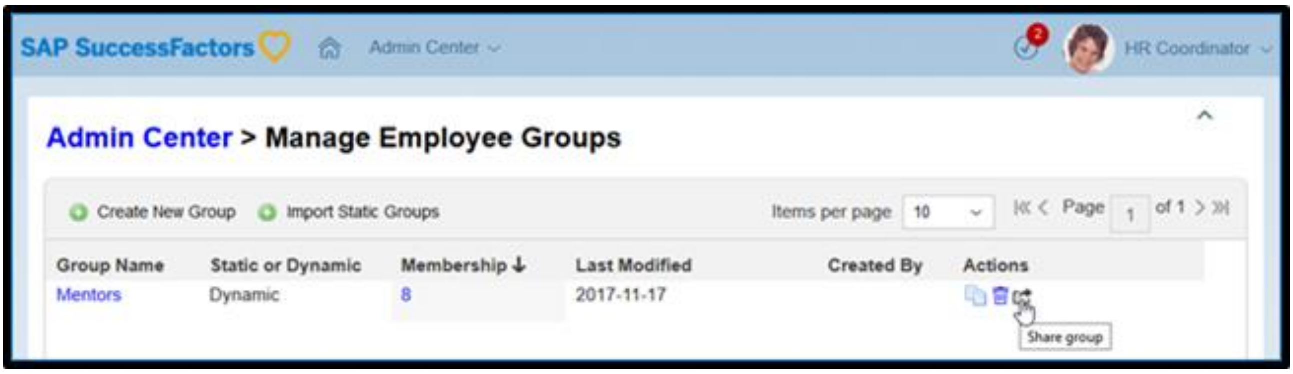
Select your criteria to create your group.



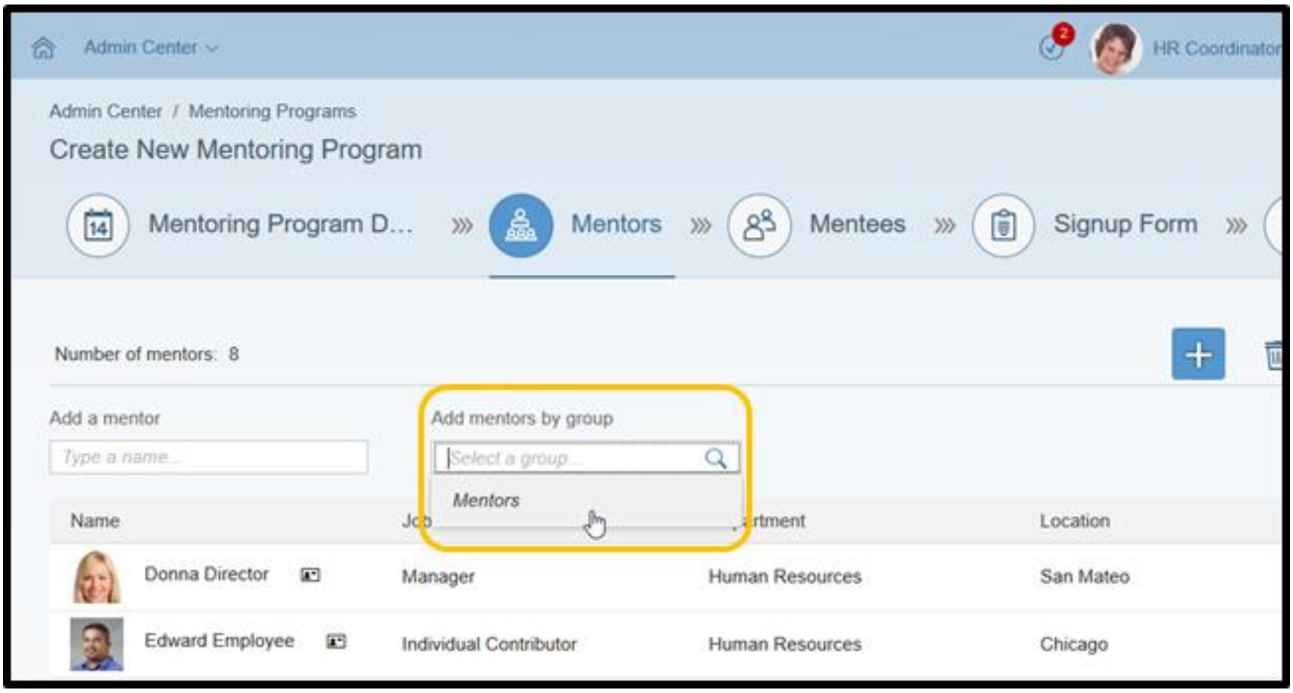
Or upload a CSV file for static groups.



Groups can be shared with other mentoring administrators if necessary:

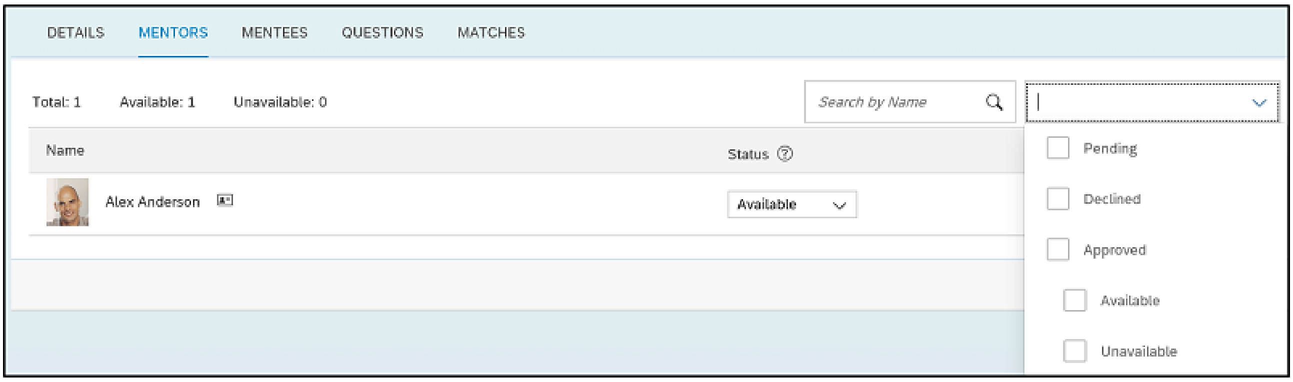


The group becomes available when selecting mentors and mentees:



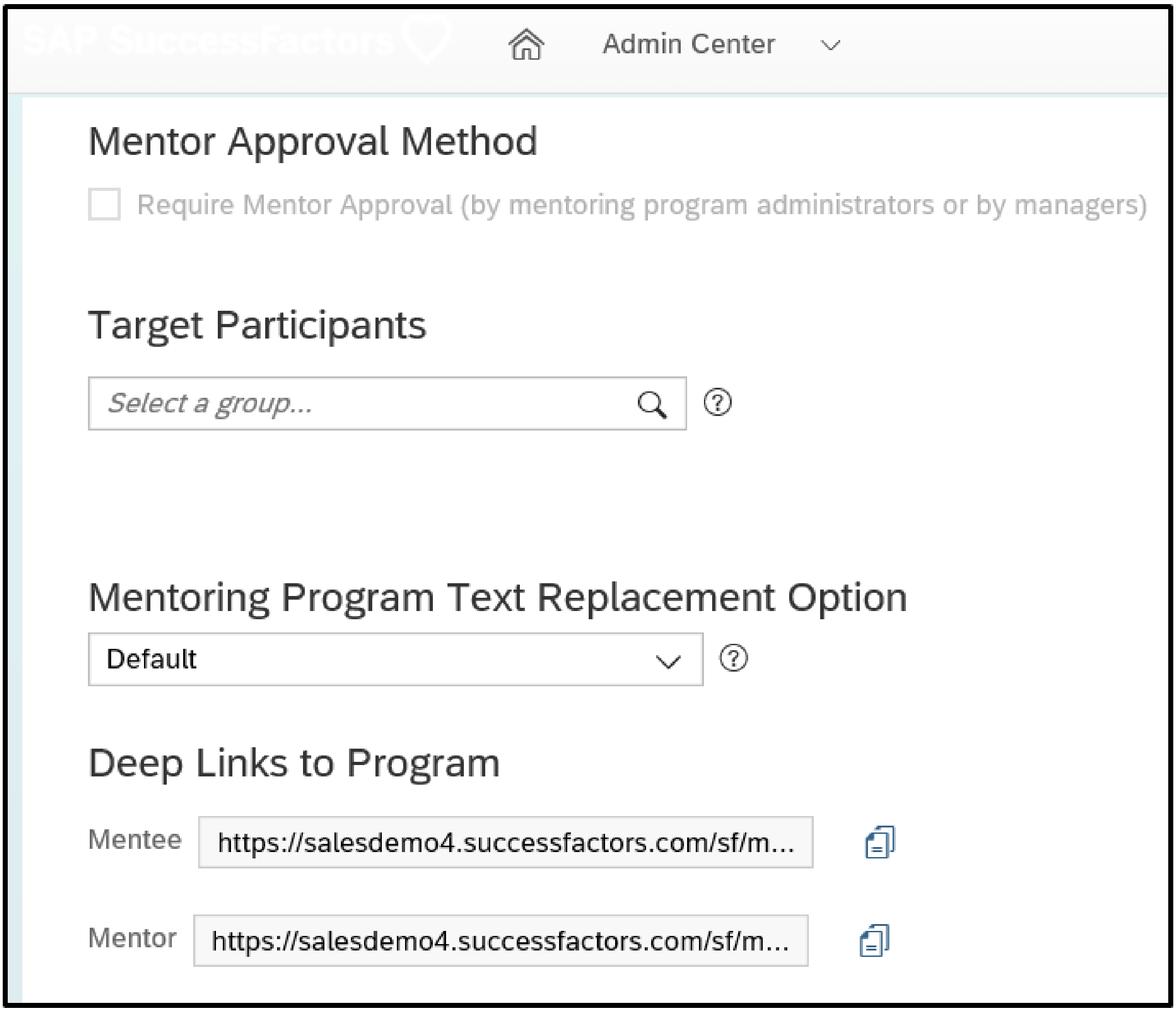
Filter Options within Mentor Tab

When managing the participation of mentors within a program, filter options in the Mentor tab allow Administrators to review all pending requests by status and approve conveniently from this area. The filters give the Administrator the ability to see the status of Pending, Declined, Accepted, Available, and Unavailable as below:



Deep Links within Manage Mentoring Programs

Deep links enables administrators to share open enrollment programs conveniently with potential participants.



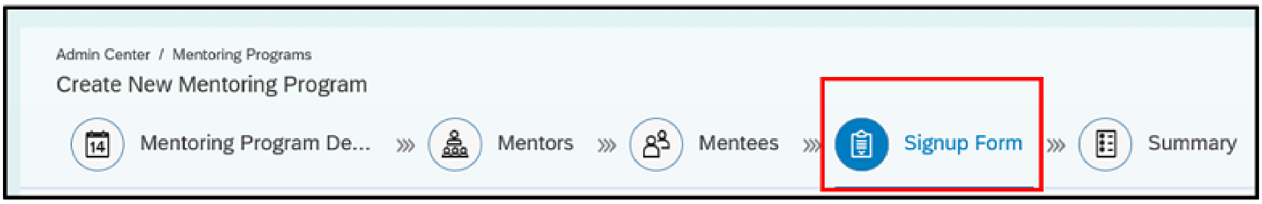
You may include a deep link to the specific mentoring program in the communication to be used in email, an intranet page, even an LMS item, or any other medium. Clicking on this deep link takes the user directly to the sign-up page for a mentoring program. Links can be generated for mentee and mentor sign-up pages as well. **However, the links will not be seen in this area until after the program has moved to the in-progress state**.

Signup Form and Matching Questions Rules

When using the sign-up form, detailed information is suggested to complete.

- Available criteria depend on your data model like:
  - Department
  - Job Family
  - Competency
- Free text answers are supported but not included in matching criteria
- Add questions indicating what displays to mentor or mentee
- Access to edit invitation email templates for communication of program

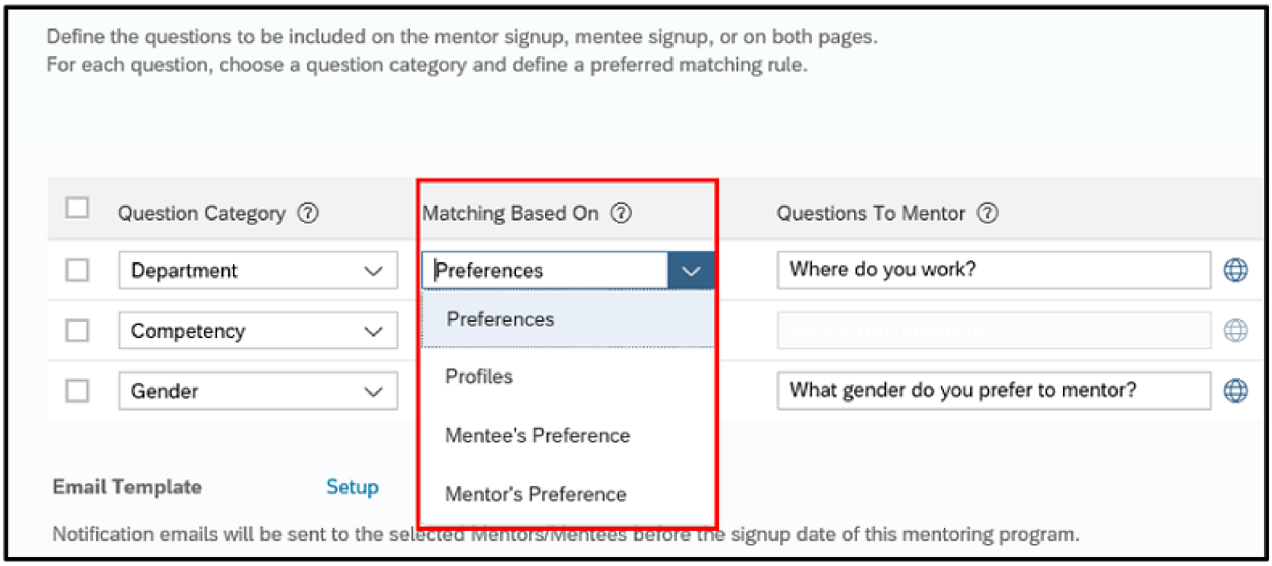
Now within the Create New Mentoring Program wizard in Admin Center, mentoring provides more matching options in the signup form step. The signup form is where an administrator defines questions presented to the mentor or mentee when registering for a program.



Matching Rules for Mentor SignUp Forms

Matching Based On

In the signup form, you also define a matching rule for each question.



Matching is based on the criteria defined below:

Preferences - You define questions both for mentors and mentees. They are matched based on the answers to the questions.

Mentee’s Preference - You define questions for mentees only. Mentors and mentees are matched based on mentees’ answers and mentors’ employee profiles.

Mentor’s Preference - You define questions for mentors only. Mentors and mentees are matched based on mentors’ answers and mentees’ employee profiles.

Profiles - You don’t define questions for mentors and mentees. They are matched based on employee profiles.

Note:
For matching based on preferences, you can use both standard and custom picklists. For matching based on mentee's preference, mentor's preference, and profiles, you can only use standard picklists.

Key Questions

Key questions may also be setup in the signup form of the wizard. Enabling key questions is as simple as a checkbox. Yet, this functionality plays an important role in the matching process. If mentors and mentees do not satisfy the matching rule of the key question, they will not be matched. To ensure that mentors are recommended to mentees, you cannot define all questions as key questions.

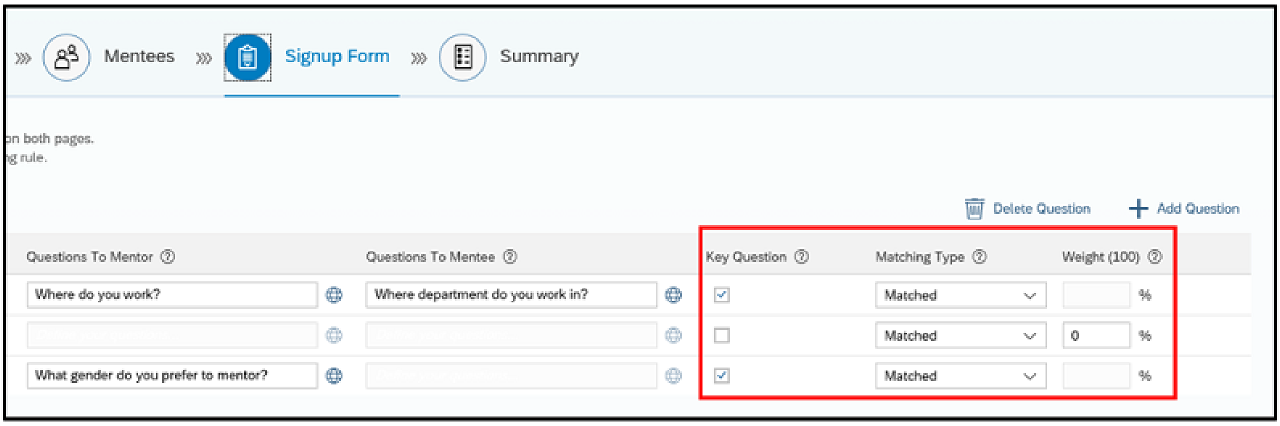
Matching Type

Administrators may also decide the matching type

Matching Type	Description
Matched (default)	Mentors get match scores when their answers or employee profiles are **matched** with those of mentees.
Not Matched	Mentors get match scores when their answers or employee profiles are **not matched** with those of mentees.

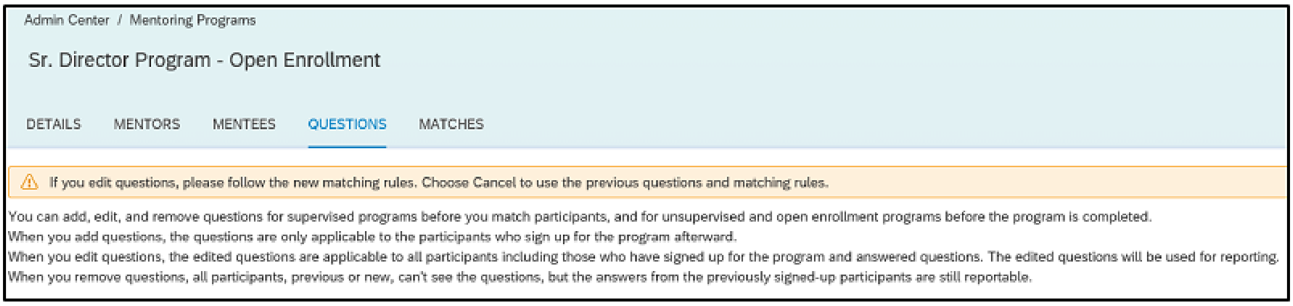
Weight

Weighting questions allows the administrators to give higher or lower emphasis based on importance. You cannot give weights for key questions or the questions that are answered with free text. If you want to apply different weights and do not want a specific question to be included for matching, leave the weight field of the question empty. Make sure that the weights of all required questions add up to 100%.



As the system starts matching, it finds the best fits between mentors and mentees based on those matching rules.

Even with previously launched programs, a message displays to warn the administrator of the new matching rules and options.



Modifying Matching Questions after Launching Mentoring Programs

Mentoring Program Administrators greatly benefit from increased flexibility in handling the matching questions or react to new needs coming up. They can edit, add, or delete questions, including their translations. When creating a supervised program, administrators can edit the questions before any matching is started allowing for more refining when designing a program. With unsupervised and open enrollment programs, administrators can modify questions before the program ends.

When you add questions after a program is launched, the questions are only applicable to the participants who sign up for the program after the modifications. When you edit questions, the new version of the question is applicable to all participants including those who have signed up for the program and answered previous questions. The edited questions will be used for reporting. When questions are removed, all participants, previous or new, can no longer see the questions but the answers from the previously signed-up participants are still reportable.

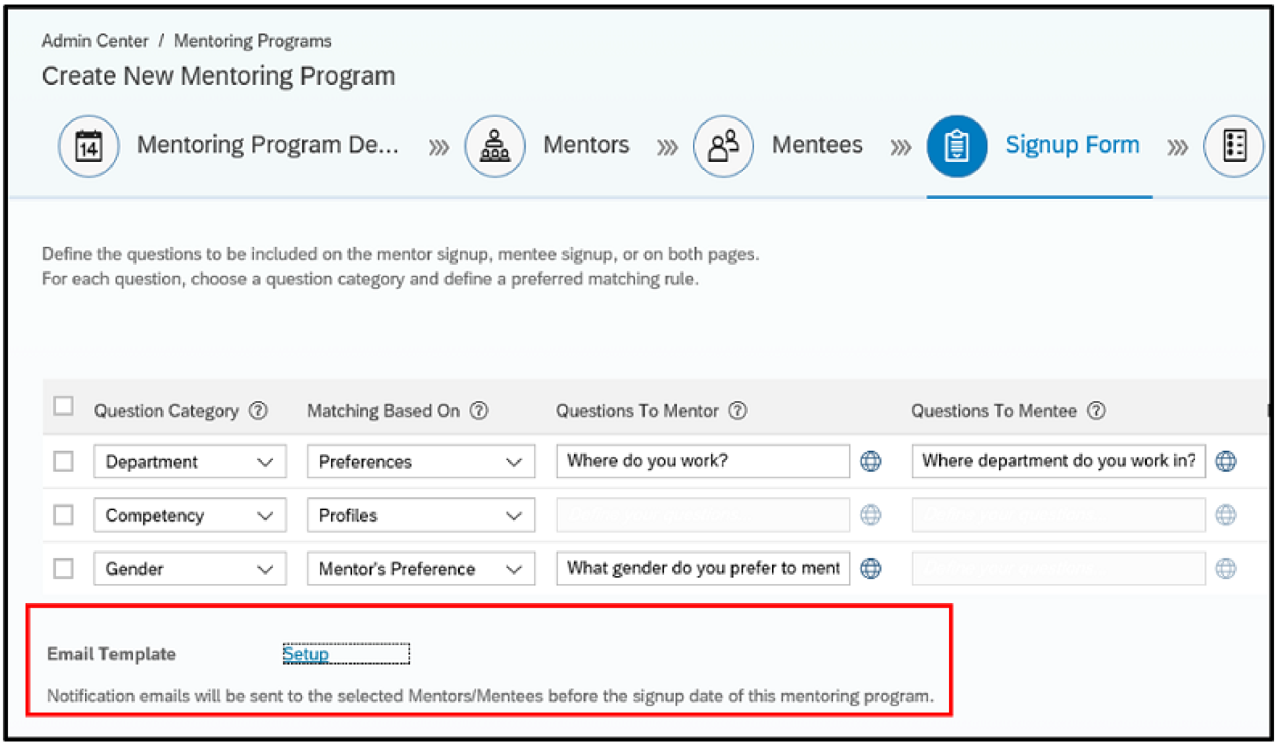
E-mail Notifications within Mentoring

Mentoring utilizes e-mail notifications to communicate actions taken or needed for the mentor or mentee. There are many various templates which trigger based on the type of program chosen as well as the integration to Jam.

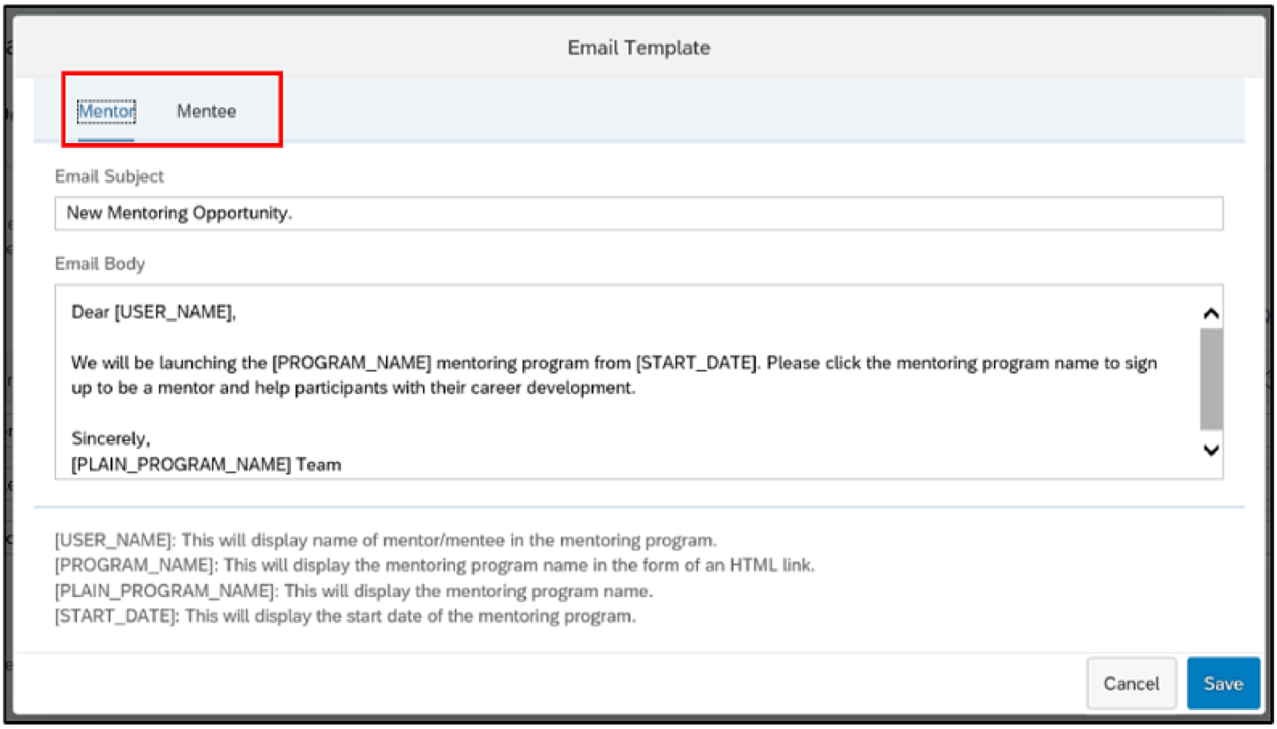
Although many of the notifications are not configurable, the invitation notifications are configurable within Admin Center and control the mentor / mentee invitation.

Recipient	Action	Subject	E-Mail Content
Mentor	Mentor invitation i Note You can customize the content of this e-mail while creating the mentoring program.	New Mentoring Opportunity	Dear [USER_NAME], We will be launching the [PROGRAM_NAME] mentoring program from [START_DATE]. Please click the program name to sign up to be a mentor and help participants with their career development. Thanks, Mentoring Team
Mentee	Mentee invitation i Note You can customize the content of this e-mail while creating the mentoring program.	New Mentoring Opportunity	Dear [USER_NAME], We will be launching the [PROGRAM_NAME] mentoring program from [START_DATE]. Please click the program name to sign up for the program and look for mentors to help you with your career development. Thanks, Mentoring Team

Within Admin Center or the Action Search, locate Manage Mentoring Programs and create a program which utilizes invitations. Within the wizard, go to the setup link on the signup form to modify the template.



Once you click on the Setup link, the invitations can be configured with specific text and tokens.



When using a program that matches the Mentor and Mentee, automatic emails are triggered based on actions taken with the matching process like below:

Mentor	Mentor is matched to mentee in a supervised program	Mentoring Match	Dear [MENTOR_NAME], You have been matched with [MENTEE_LIST] in [PROGRAM_NAME]. The mentoring program will begin on [START_DATE]. Please go to [PROGRAM_NAME] to view your match details and get in contact with your mentees. Sincerely, [PROGRAM_NAME] Team
Mentee	Mentee is matched to mentor	Mentoring Match	Dear [MENTEE_NAME], You have been matched with [MENTOR_NAME] in [PROGRAM_NAME]. The mentoring program will begin on [START_DATE]. Please go to [PROGRAM_NAME] to view your match details and get in contact with your mentor. Sincerely, [PROGRAM_NAME] Team

Other emails are generated during the approval or decline process to offer next steps:

Mentor	Mentee requests mentor	Mentoring Match Approval Request	Dear [MENTOR_NAME], Thank you for agreeing to participate in [PROGRAM_NAME]. The following mentees will be matched with you after your approval: [MENTEE_LIST]. Please go to [PROGRAM_NAME] to approve or decline the requests. Sincerely, [PROGRAM_NAME] Team
Mentee	Mentor declines request	Match Request Declined	Dear [MENTEE_NAME], Your request to be matched with [MENTOR_NAME] in [PROGRAM_NAME] has been declined. [MENTOR_NAME] shared the following reason with you: [DECLINE_MESSAGE] To request for a new mentor, please go to [PROGRAM_NAME]. Sincerely, [PROGRAM_NAME] Team
Mentee	Auto-decline due to mentor availability	Match Request Declined	Dear [MENTEE_NAME], Your request to be matched with [MENTOR_NAME] in [PROGRAM_NAME] has been declined automatically because they are no longer available. To request for a new mentor, please go to [PROGRAM_NAME]. Sincerely, [PROGRAM_NAME] Team

In addition, there are notifications regarding the availability of the mentor. In different scenarios, both mentors and mentees receive email notifications:

- Mentees and pending mentees receive an email notification when the availability status of mentors is changed.
- Mentors receive an email notification only when administrators change their availability status.

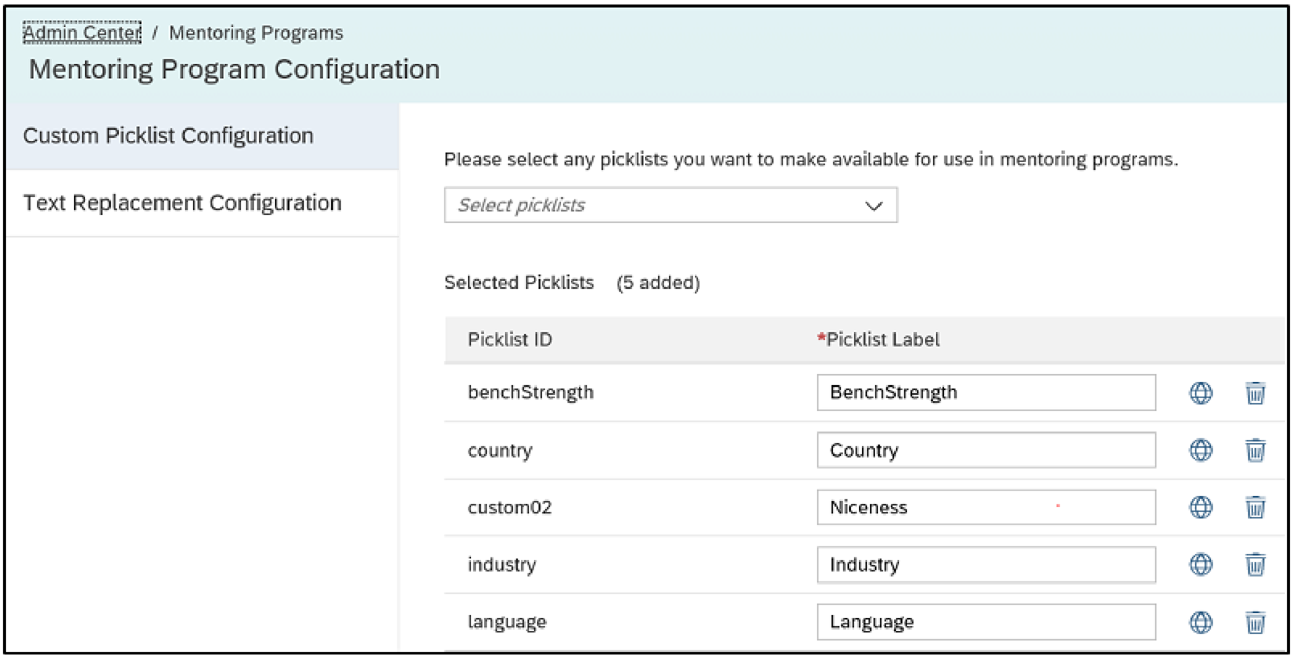
Mentor	Mentor becomes unavailable	You are now unavailable as a Mentor in [PROGRAM_NAME]	Dear [MENTOR_NAME], Your status in [PROGRAM_NAME] has been set to unavailable until [START_DATE]. This means you cannot be searched or selected as a mentor in the mentoring program during this period. To make changes to your availability status or dates, go to the [PROGRAM_NAME] page. Sincerely, [PROGRAM_NAME] Team
Mentee	Mentor becomes unavailable	Your mentor is unavailable	Dear [MENTEE_NAME], Your mentor [MENTOR_NAME] is unavailable in [PLAIN_PROGRAM_NAME] until [MENTOR_UNAVAILABLE_END_DATE]. To request for a new mentor, please go to [PROGRAM_NAME]. Sincerely, [PLAIN_PROGRAM_NAME] Team
Pending mentee	Mentee sent a request to a mentor The mentor becomes unavailable	The mentor you requested is unavailable	Dear [MENTEE_NAME], The mentor [MENTOR_NAME] is unavailable in [PLAIN_PROGRAM_NAME] until [MENTOR_UNAVAILABLE_END_DATE]. To request for a new mentor, please go to [PROGRAM_NAME]. Sincerely, [PLAIN_PROGRAM_NAME] Team

Mentee	Mentor becomes available	Your mentor is available again	Dear [MENTEE_NAME], Your mentor [MENTOR_NAME] is available again in [PLAIN_PROGRAM_NAME]. To get in contact with your mentor, please go to [PROGRAM_NAME]. Sincerely, [PLAIN_PROGRAM_NAME] Team
Pending mentee	Mentee sent a request to a mentor The mentor became unavailable The mentor becomes available again	The mentor you requested is available again	Dear [MENTEE_NAME], The mentor [MENTOR_NAME] is available again in [PLAIN_PROGRAM_NAME]. Please wait for the approval. To change the request, go to [PROGRAM_NAME]. Sincerely, [PLAIN_PROGRAM_NAME] Team
Mentor	Mentor will become available tomorrow	You will be available as a Mentor tomorrow in [PROGRAM_NAME]	Dear [MENTOR_NAME], This is a reminder that your status in [PROGRAM_NAME] will be set to available tomorrow. This means that, starting tomorrow, you may be selected as a mentor.

For a full listing of the Mentoring notifications, reference the Mentoring Admin Guide located in the Career Development Planning section at help.sap.com.

Custom Picklists for Mentoring

Custom picklists created using either the legacy or the Metadata Framework (MDF) tools can be configured for use in mentoring programs.



Procedure

1. Navigate to Admin Center > Manage Mentoring Programs.
2. Click (Settings).
3. On the Custom Picklist Configuration tab, use the dropdown to select the picklists you want to make available for use in mentoring programs.
4. Assign a Picklist Label and click (View Translations) to view or edit label translations.

Note: The (Remove) function does not delete the picklist from your system. It just removes the setting that makes the picklist available for use in new mentoring programs. Any existing mentoring programs that were created using the custom picklist will not be affected.

5. Save your changes.

The custom picklist is available when setting up new mentoring programs. When you are creating the mentoring sign-up forms, the custom picklists are listed alphabetically after the standard field picklists.

Search and Display Behaviors in Program Overview Pages

On the Mentors or Mentees tabs of administrator program overview page, the system displays the first 200 matches or 500 participants automatically. For mentors and mentees that are not shown, the admin can search for a mentor or mentee by name or display a filtered list by matching level. (Matching level is available for supervised program only.) In order to assure that any user can be displayed, you can search for users by their user name or full name.

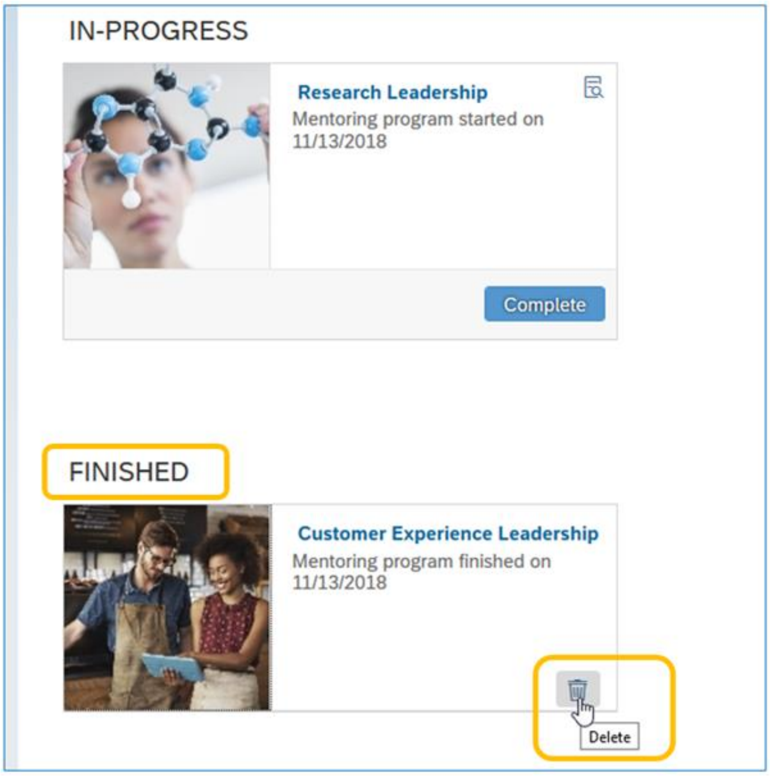
On the Matches tab, all adjustments by the administrator will be saved immediately and reflected in the user interface in real time. With the latest changes, there is no need for a cancel or save button on this tab for all mentoring types.

And when the administrator clicks Assign from the Matches tab, a pop up modal allows them to find and assign a new mentor or mentee. No more than 200 results are displayed before a message will be shown asking the user to refine the search criteria.

And when using a supervised mentoring program, the functionality can only support up to 3,000 mentors and 3,000 mentees; however, the system will validate the number of invitees and prevent the saving and launching of a program with too many invitees.

Archiving a Program

Mentoring administrators may archive a program, thereby removing it from their view in Manage Mentoring Programs. For completed programs only, this feature removes the program from admin view, but does not delete data related to users' participation in the programs. Reporting and future functionality that is intended to show historical participation will not be affected.



Lesson Conclusion - Creating, Managing, and Archiving Mentoring Programs

In this lesson, you were introduced to basics of creating a new mentoring program. You should also be able to define an open enrollment mentoring program and describe the options to validate the mentors.

Lesson 7-4 - Matching Interaction for Supervised Programs

Lesson Overview

The goal for this lesson is to provide guidance for the matching interaction for supervised programs.

Lesson Objective

- Define the steps for the matching interaction for supervised programs

Matching Interaction Procedure

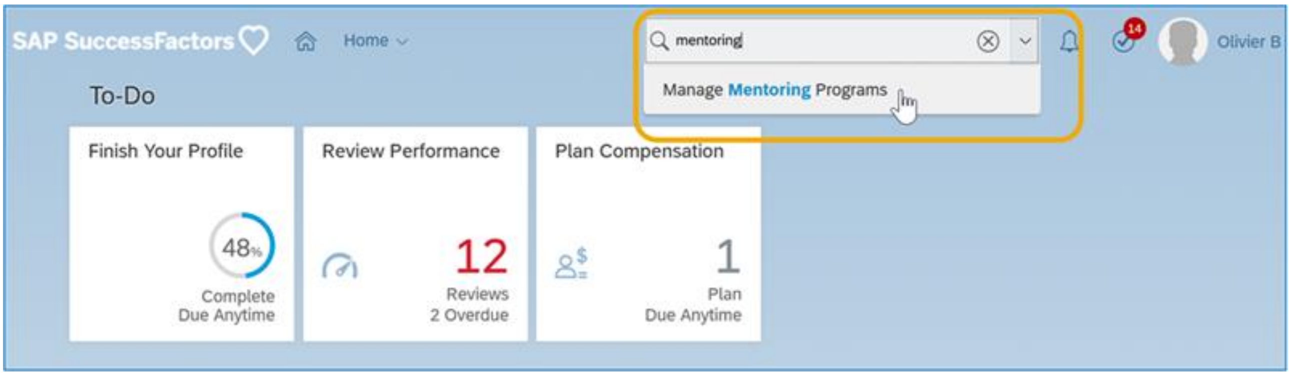
When you run matching on a supervised mentoring program, the system uses an algorithm to compare preferences and profile data to suggest matches for mentors and mentees.

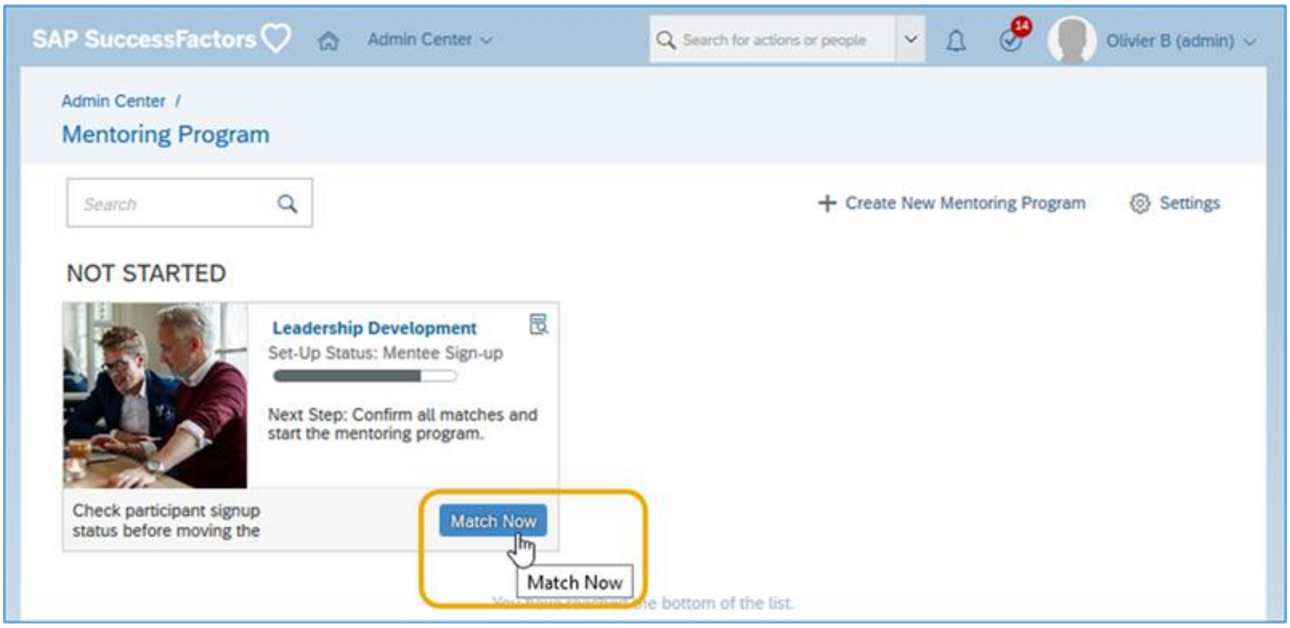
Once a program has mentors and mentees signed up, you can click on Match Now and a backend matching job will start.

⚠	Due to processing intensity, we are recommending that no more than 3,000 mentors and 3,000 mentees be invited to a supervised mentoring program. It is planned to enforce this limit. If the number of matched participants in supervised mentoring programs is huge, it might take a long time for the back-end matching job to complete.

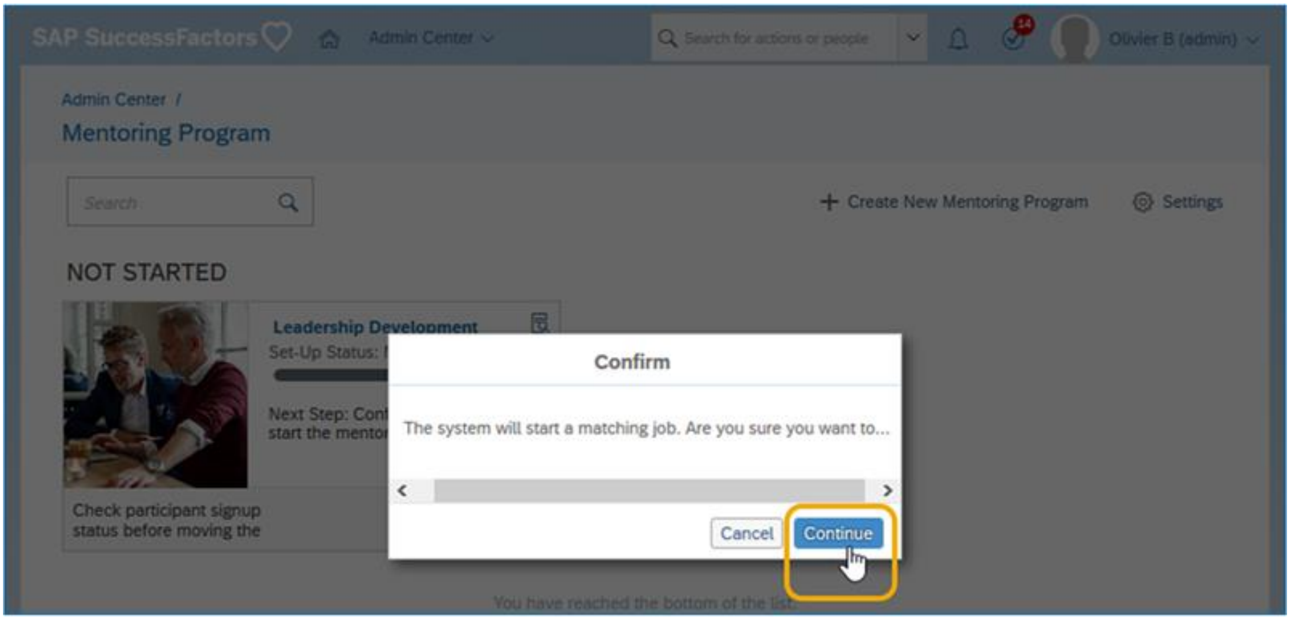
1. With the Action Search, go to *Manage Mentoring Programs*.

2. Locate the mentoring program in the Set Up section and click Match Now.

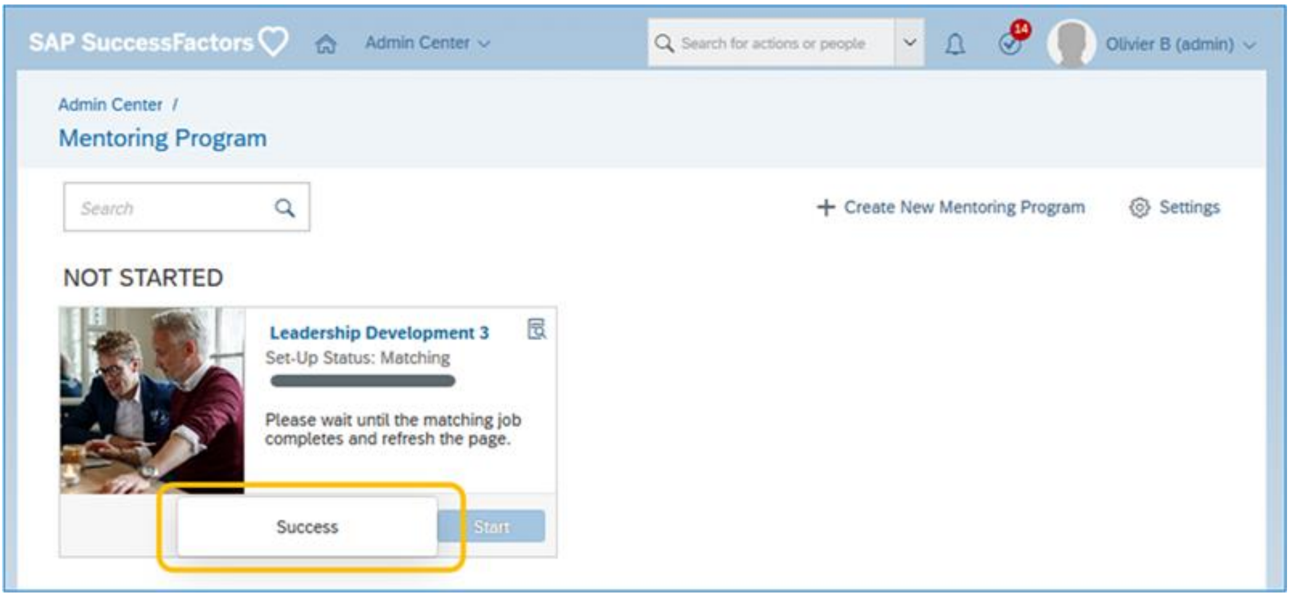


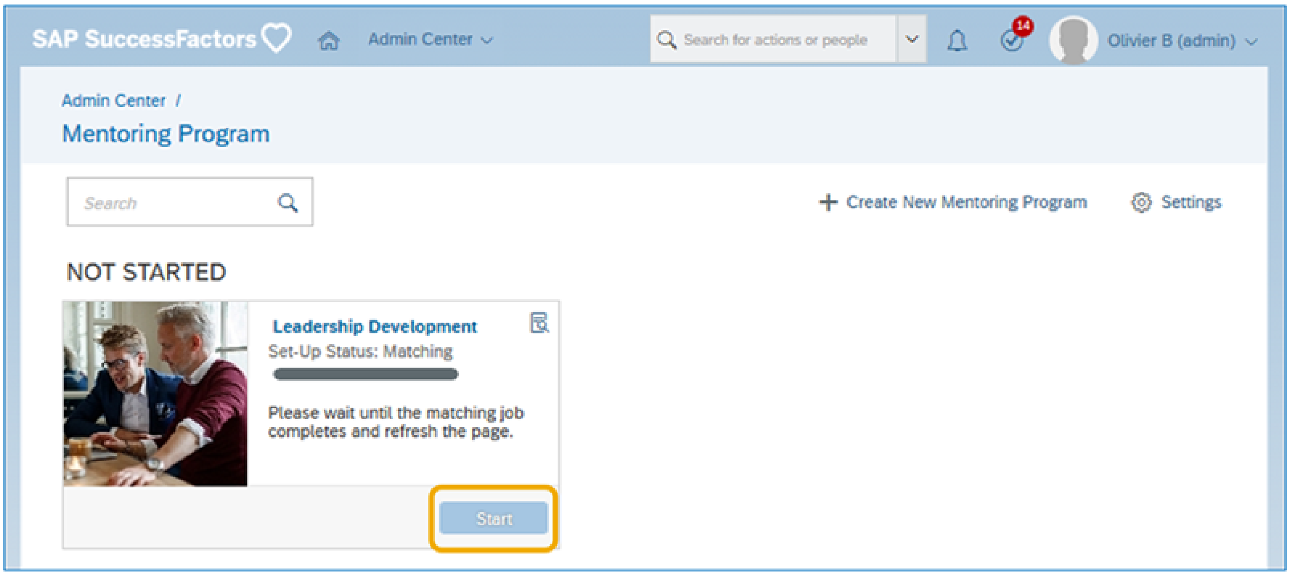


3. There is a pop up message to confirm that we want to proceed and that the system should start the matching job. Click on Continue.



4. A very quick message shows on the program card saying “Success”. The job starts. The program is still in the Not Started section but the button *Start* is not clickable.

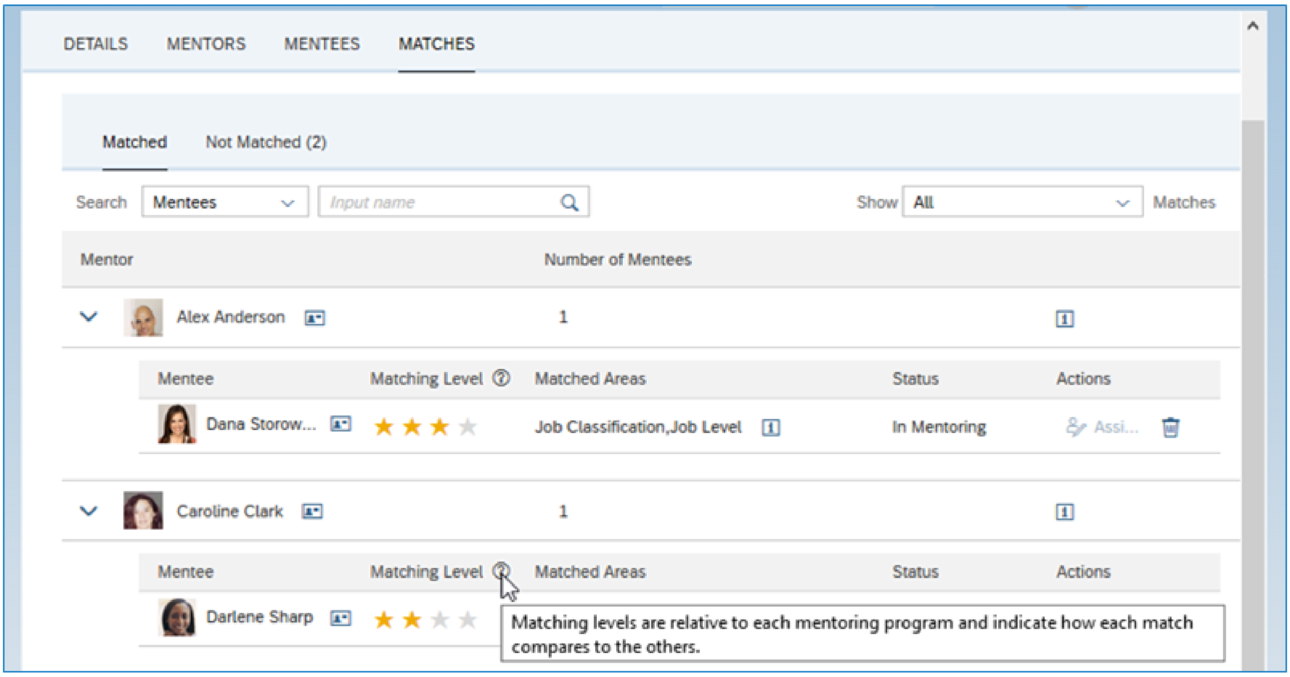




5. Click on the Program Name to review the matches

The matching algorithm goes through mentor and mentee records to find matches based first on preferences and then on profile data. The system assigns the following match levels to the resulting matches:

- **Preferred** (four stars): The mentee has been matched with one of the preferred mentors selected during sign-up.
- **Excellent** (three stars): The mentee has been matched with a mentor with whom he or she has a 75% or higher matching score.
- **Good** (two stars): The mentee has been matched with a mentor with whom he or she has a 74.99% to 50% matching score.
- **Average** (one star): The mentee has been matched with a mentor with whom he or she has a 49.99% or lower matching score.



6. After the matching job completes, review and edit the matches on the program overview page.

You can either save the edited matches for later completion or start the program after making changes. You can also adjust matches from the program overview page after the mentoring program has started.

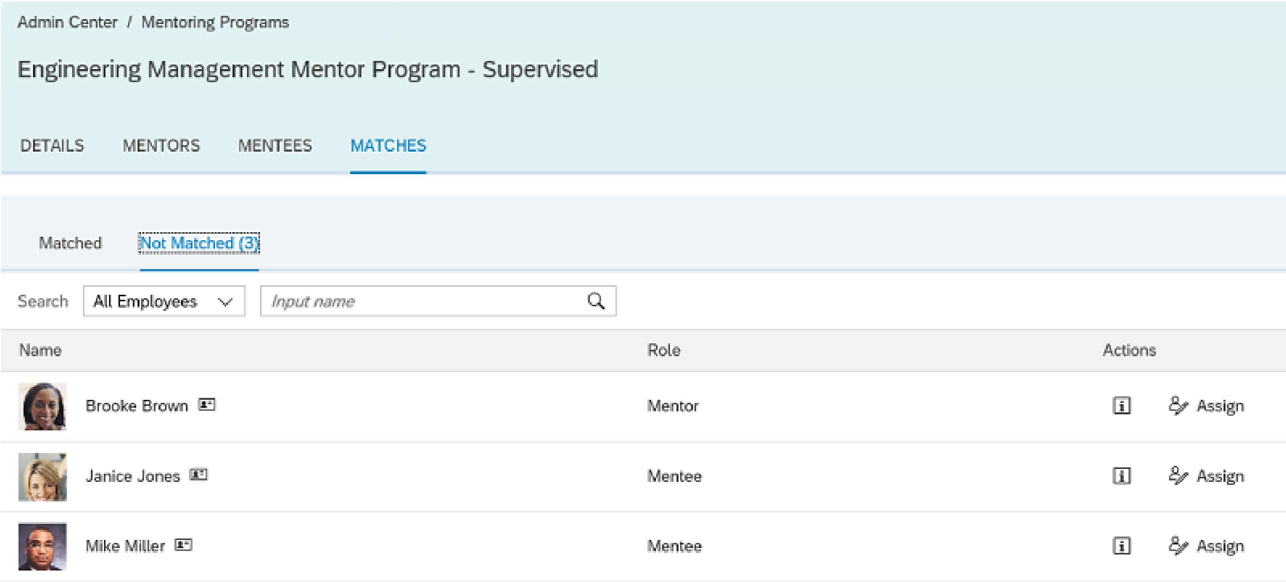
a) To change a match, go to the mentee card and click the *Remove* icon to remove a match or the *Assign* icon to assign a new mentor. The mentee and mentor move to the *Not Matched* tab where you can assign a new match.

If the mentor is matched with more than one mentee, then the mentor is only moved to the Not Matched if you remove all mentee matches.

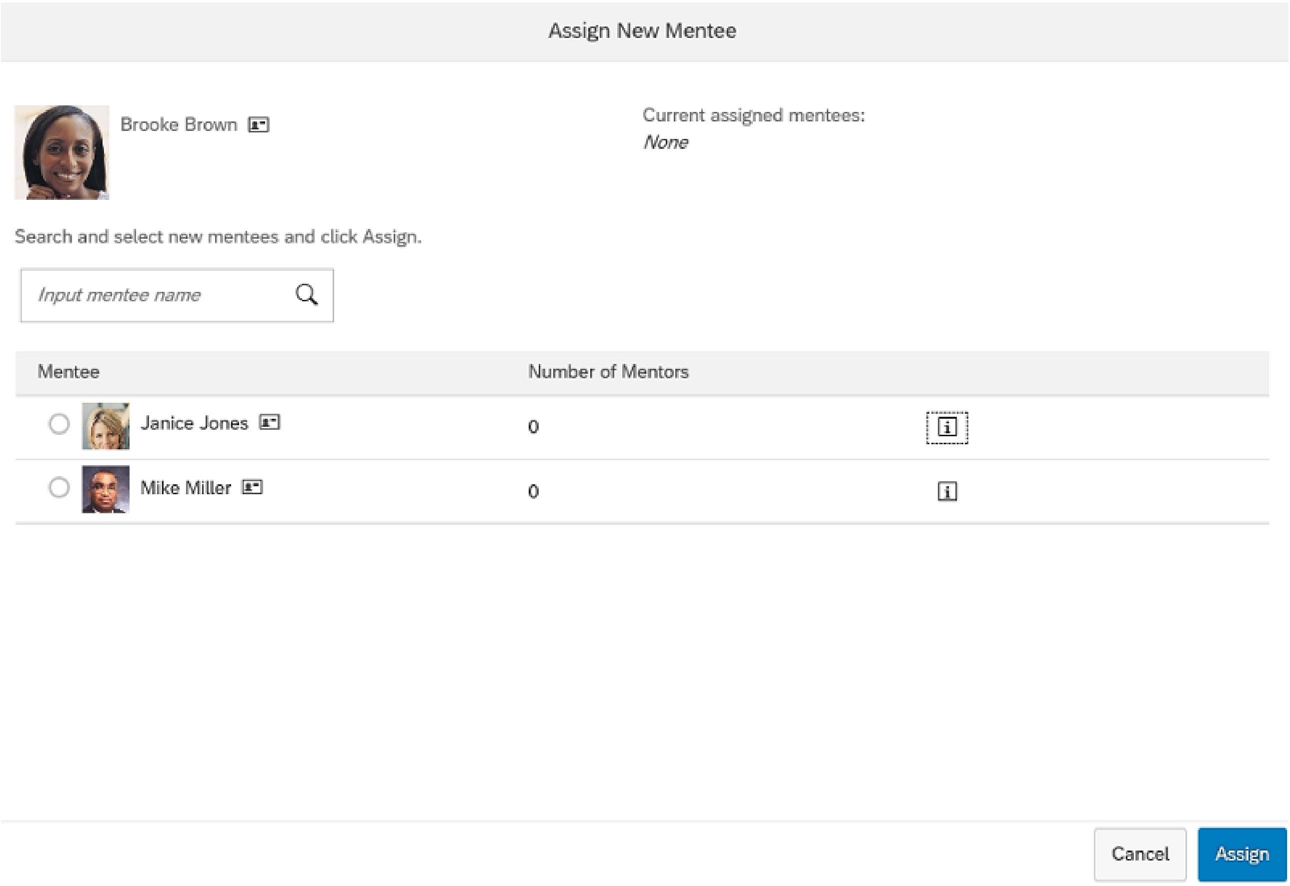
b) Review the *Not Matched* tab for any mentees remaining unmatched.

The matching algorithm may return initial results with some mentees and mentors unmatched. The circumstances for this result may include:

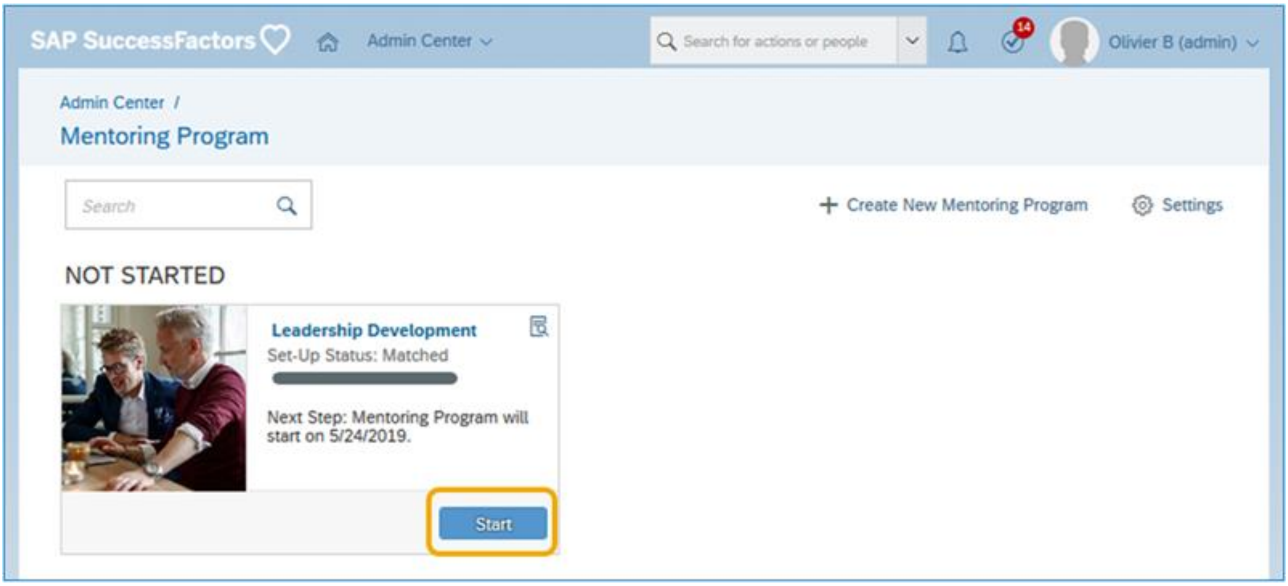
- More mentors than mentees signed up for the program
- Not enough mentors signed up for the program



7. When selecting the Assign button is button, additional matching opportunities are available and actions are automatically saved.



8. If necessary, refresh the page and the button Start becomes clickable.



9. When ready, go to the program card and click *Start*. From the confirmation popup window, click *Continue*. This moves the program status to *In-Progress*. The Mentoring Match e-mail is sent to all matched mentors and mentees informing them of the match. They can view the match details on the Mentoring page.

Lesson Conclusion - Matching Interaction for Supervised Programs

In this lesson, you were introduced to different steps for the matching interaction for supervised programs.

Lesson 7-5 - Program Experience of the Mentor/Mentee

Lesson Overview

The goal for this lesson is to demonstrate the expected experience of the Mentor/Mentee.

Lesson Objective

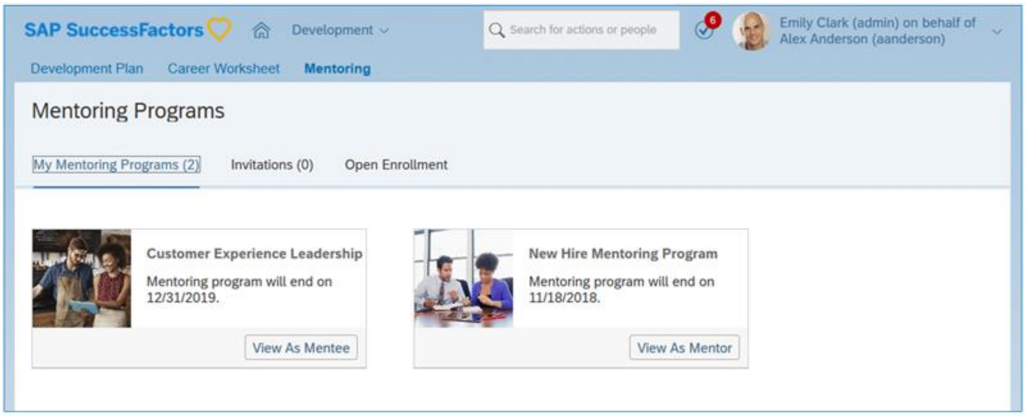
- Define the steps and process of the Mentor/Mentee Experience

Where does the Mentor/Mentee Experience Begin?

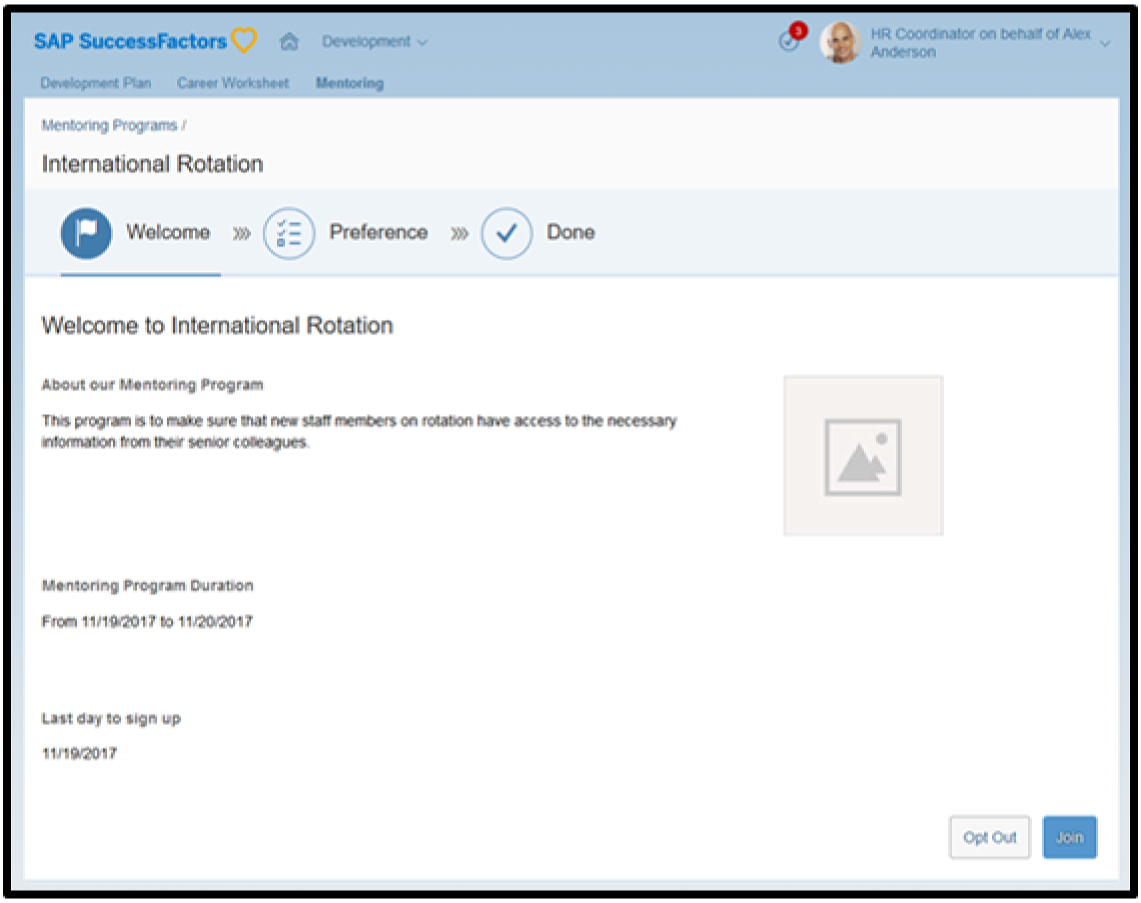
Within a Mentoring Program, the experience of the user varies based on the defined role of Mentor or Mentee. To begin, navigate to Home > Development and select Mentoring. If the Mentoring option does not exist, check to see if the employee is listed in the program and has the proper permissions.

The mentoring home page for the end users divided into different sub-tab

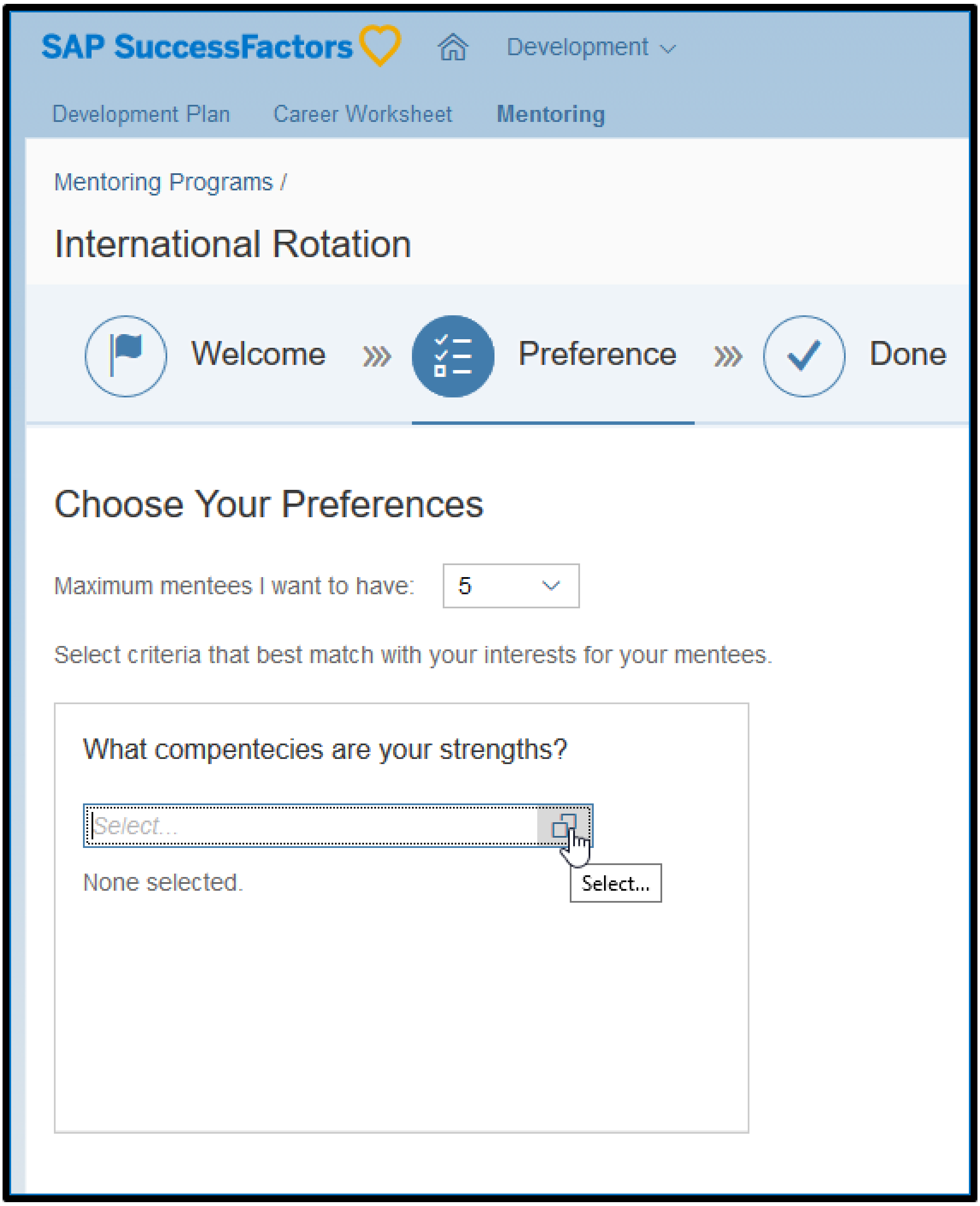
- My Mentoring Programs
- Invitations
- Open Enrollment



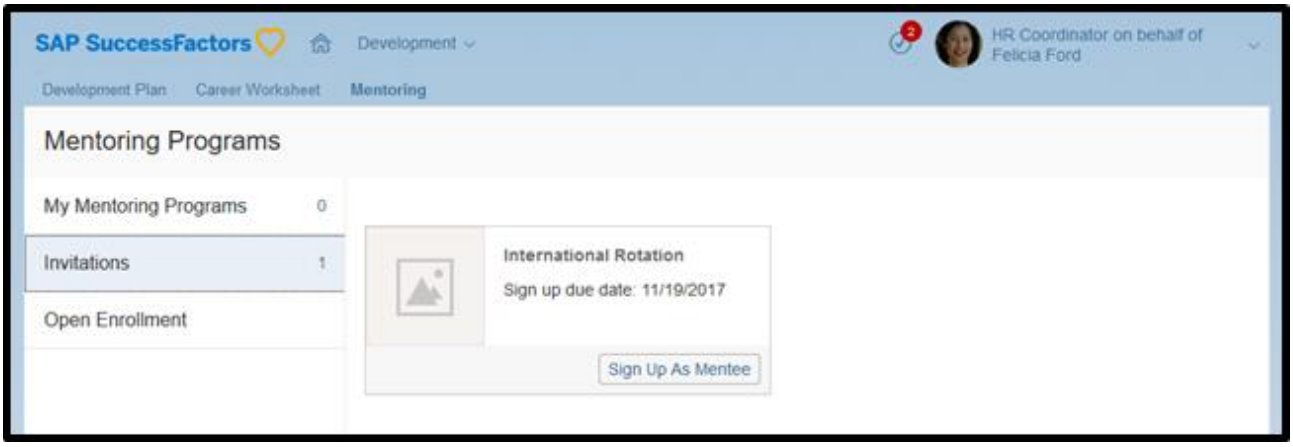
In order for the mentor to sign up, the employee must be invited to be a mentor within the specific mentoring program. The invitation holds some of the most important program information like description, duration and deadline dates for sign up.

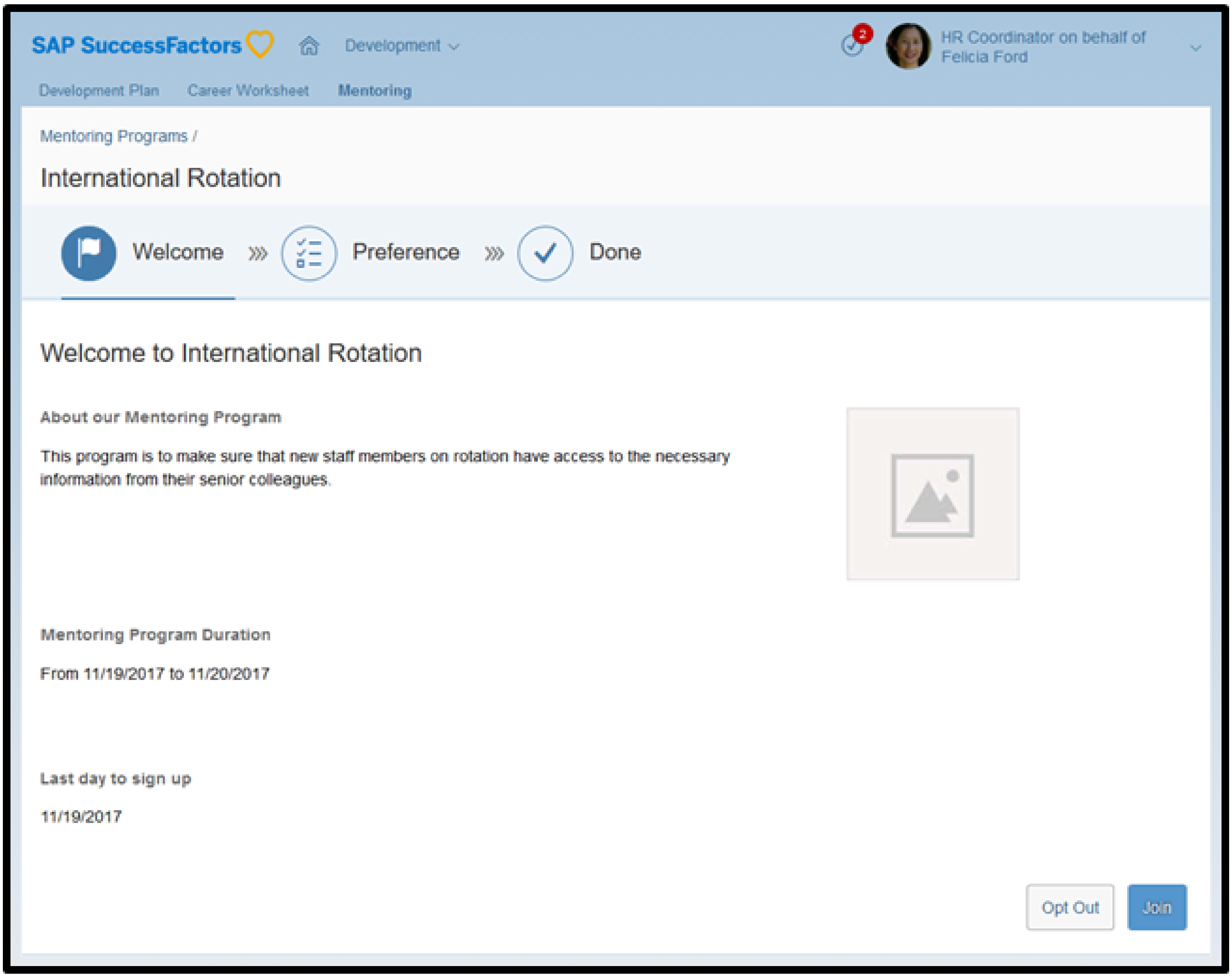


Following the mentor sign-up wizard, the employee may choose preferences like department, job family, and competencies in which he or she feels capable and willing to work with mentees. This offers the opportunity to include departments other than his or her own to transfer experience working with people throughout the company.
Note that for any criteria he does not choose preferences for the algorithm will match based on what’s in his or her employee file-his department, job, family, etc.



The mentee sign-up experience begins with an invitation to be a mentee in the specifically designated program. The employee reads about the program, reviews the dates, and decides to sign up.





In turn, the mentee can do the following:

1. Choose the departments, job family, and competencies of greatest interest.
2. Select a preferred mentor and complete sign up.

- For unsupervised programs, preferred mentors receive a match request.
- For supervised programs, the preferred mentors are promoted by the matching algorithm.

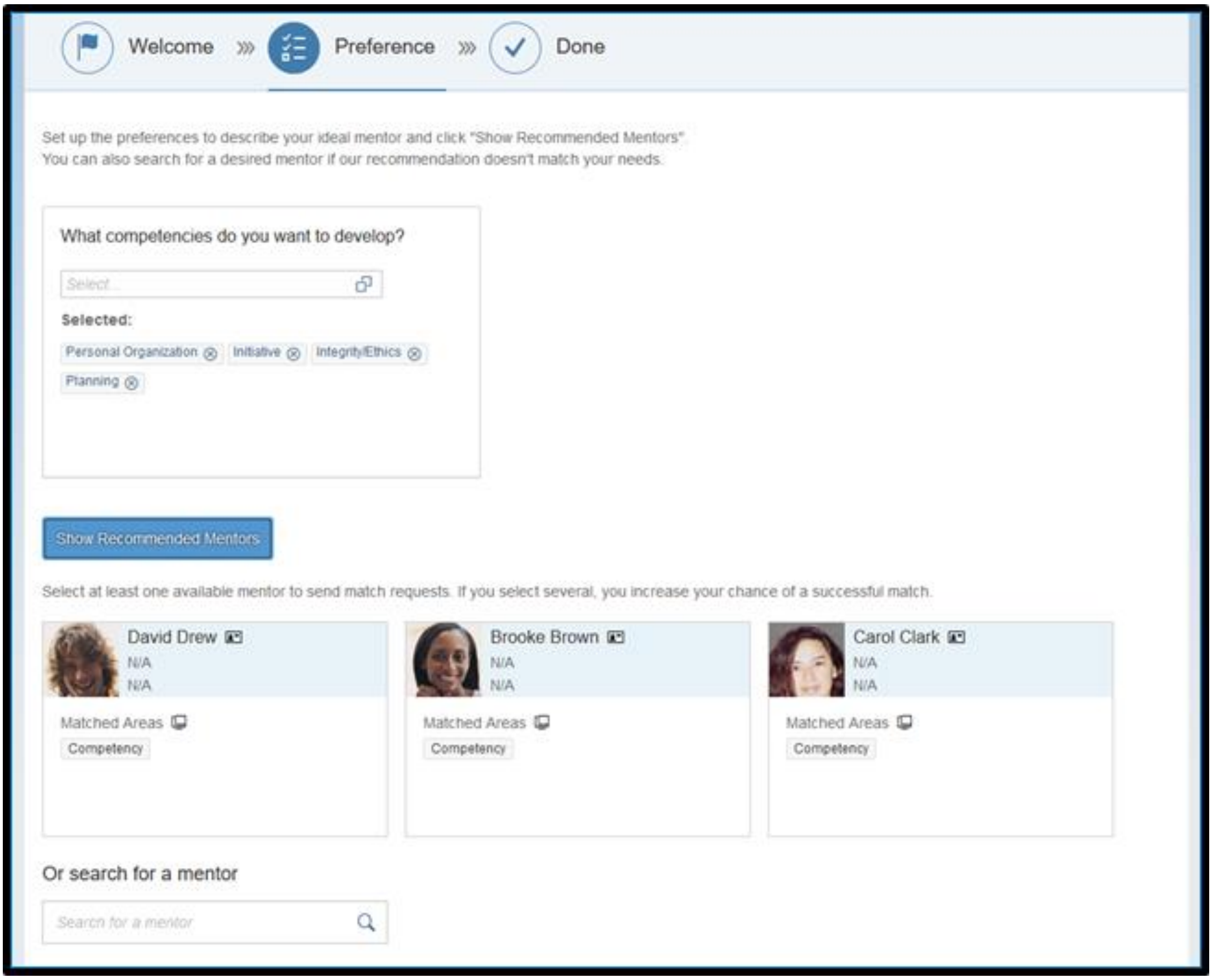
When mentees click "Show Recommended Mentors" on the mentee sign-up form or in the "Invite Other Mentors" popup, the result page loads no more than two rows of mentors at a time.

The number of mentors shown in each row depends on the size of web browser window. Mentees can click "View More" to load other available mentors.

Only up to 10 mentors can be displayed.

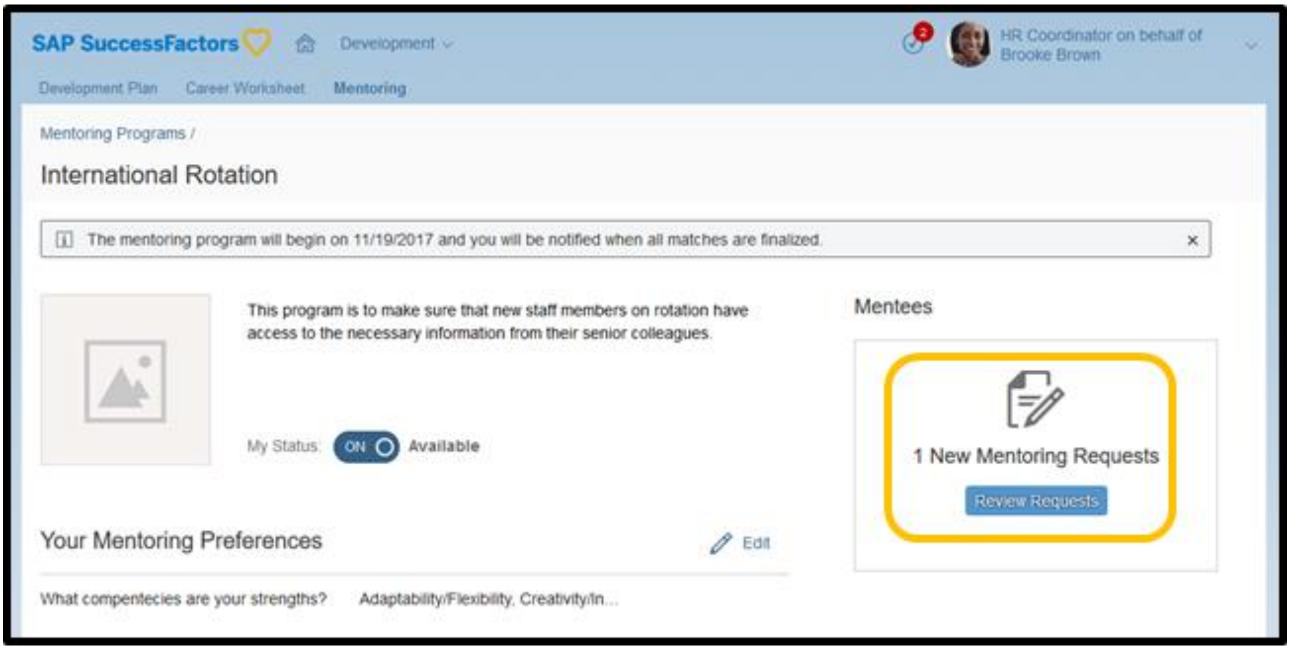
The mentee could also seek out and request a mentor who is not on the recommended list.

Simply use the search feature to find of select a different person as your mentor.



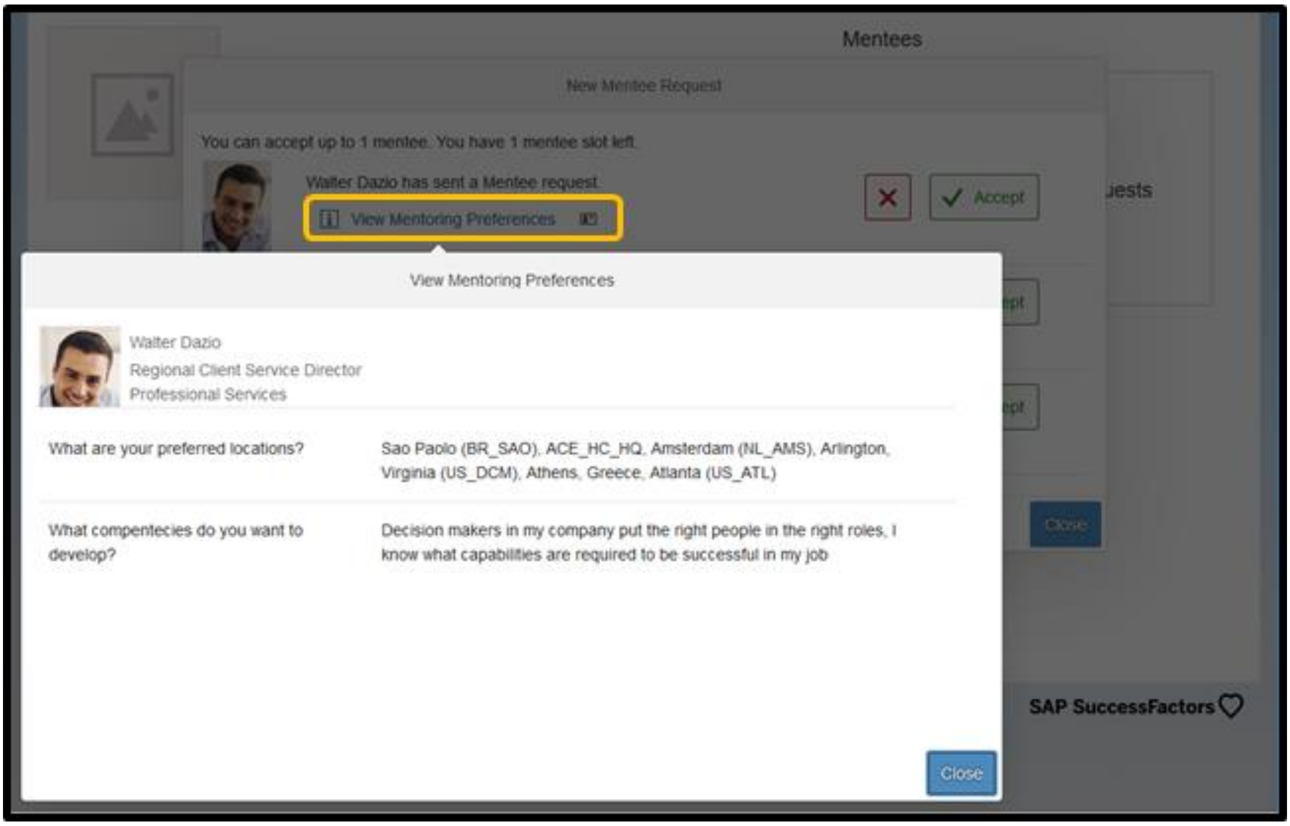
Reviewing Mentoring Requests

When a mentor signs up in unsupervised or open enrollment mentoring programs, mentees send you mentoring requests that they can accept or decline. When a mentee requests to a potential mentor, this potential mentor receive an e-mail notification.

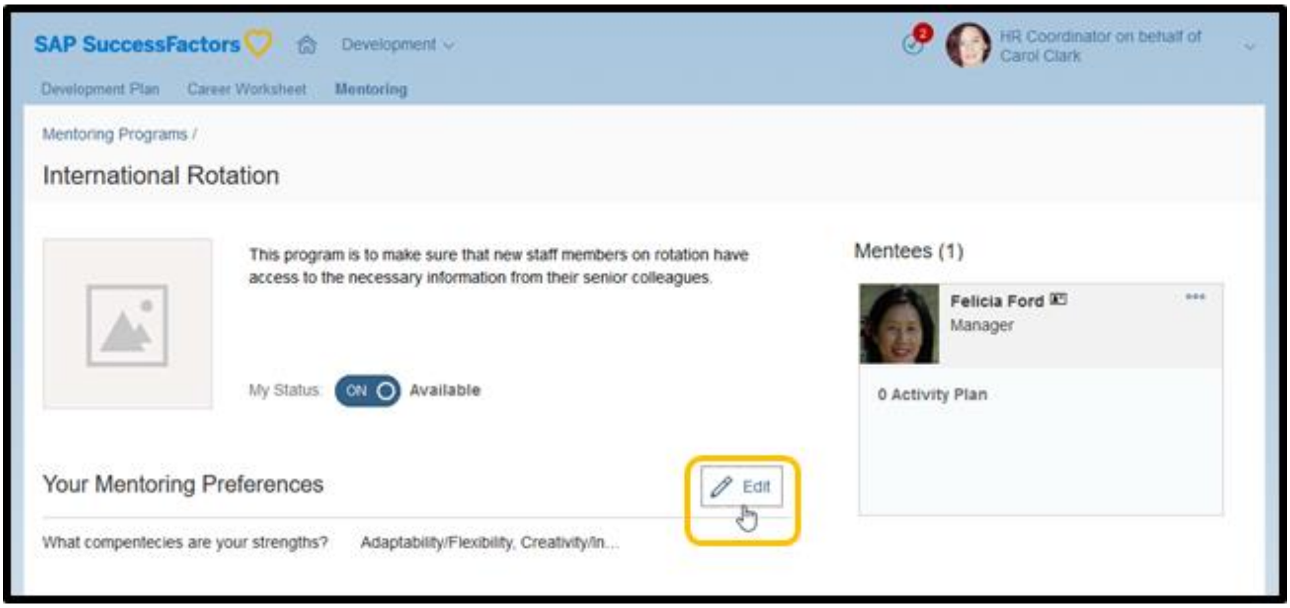


With the mentoring request, mentors will be able to review the mentoring preferences, including free text answers.

- When they choose to decline the mentoring request, mentors can add a note that will be included in the notification email to the mentee.
- When they choose to accept the mentoring request, mentors are matched to the mentee until one of them ends the relationship or the mentoring program ends.



Mentors and Mentees can easily edit their matching preferences after the program start date.



	Mentors in open enrollment or unsupervised programs can receive up to 20 mentoring requests at a time.

When a mentor or mentee has been successfully matched, their mentoring program overview page will show a card with their mentor/mentee's details, including matched criteria and any development goals.

A 5-item Activity Plan can be populated and edited by either mentor or mentee.

Lesson Conclusion - Program Experience of the Mentor/Mentee

In this lesson, you were introduced to the expected experience of the Mentor/Mentee.

Lesson 7-6 - Additional Materials for Mentoring

Lesson Overview

The goal for this lesson is to provide the location of the Mentoring Administration Guide.

Lesson Objective

- Identify the location of the Mentoring Administration Guide

Where is the Mentoring Administration Guide?

Once the initial activation is completed, please reference the Mentoring Administration Guide located at http://help.sap.com for further details regarding the next steps taken by the Administrator to configure and utilize Mentoring. Also, this is the conclusion of the Career Development Planning (CDP) Administration Guide.

Lesson Conclusion - Additional Materials for Mentoring

In this lesson, you were introduced to provide the location of the Mentoring Administration Guide.

Unit Wrap-Up

In this unit, you covered:

- Lesson 7-1: Activation of the Mentoring Features
- Lesson 7-2: Role-Based Permissions for Mentoring
- Lesson 7-3: Creating, Managing, and Archiving Mentoring Programs
- Lesson 7-4: Matching Interaction for Supervised Programs
- Lesson 7-5: Program Experience of the Mentor/Mentee
- Lesson 7-6: Additional Materials for Mentoring

You should now be able to:

- Upgrade to the Mentoring Feature
- Grant Permissions to Access Mentoring

- Create and Manage a New Program
- Locate Additional Material for the Use of Mentoring