SAP SuccessFactors

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# Implementing and Managing Goal Management



THE BEST RUN SAP

# Content

# Change History

Learn about changes to the documentation for Goal Management in recent releases.

## 1H 2023

| Type of Change | Description | More Info |
|---|---|---|
| **June 16, 2023** | | |
| Added | We added a note about the integration with Performance Management forms and 360 Reviews forms. | Overview of the Latest Goal Management [page 184] |
| **June 2, 2023** | | |
| Changed | We specified the need of template conversion for the latest Goal Management to be integrated with other modules. | Overview of the Latest Goal Management [page 184] |
| Changed | We added information about module integration in the short description. | Converting Existing Goal Plan Templates [page 195] |
| **April 21, 2023** | | |
| Changed | • We adjusted the order of supported features for end-users.<br>• We added these features that are currently supported for end-users:<br>  ◦ View the audit history of goals<br>  ◦ Manage milestones for goals<br>  ◦ Create personal goals from a goal library<br>  ◦ Search for people by advanced criteria to cascade or assign goals<br>  ◦ Legal Scan<br>• We updated supported features for administrators.<br>• We added the supported integration with Dynamic Teams. | Overview of the Latest Goal Management [page 184] |

| Type of Change | Description | More Info |
|---|---|---|
| Changed | • We removed some features that are currently supported:<br>  ◦ Goal audit<br>  ◦ Milestones<br>  ◦ Adding goals from the goal library<br>  ◦ Advanced user search by criteria<br>  ◦ Legal Scan<br>• We added a restriction of goal plan. | Reduced Scope of the Latest Goal Management [page 187] |
| Added | We added several features that are unsupported in Mobile apps:<br>• View the audit history of goals<br>• Advanced user search by criteria<br>• Legal Scan<br>• Integration with Dynamic Teams | Reduced Scope for Mobile Apps [page 188] |
| Added | • We added the elements supported in the latest Goal Management, and also updated the supported attributes.<br>• We added unsupported field types for milestones.<br>• We marked two fields that are supported for performance goals only. | Changes to Goal Plan Templates [page 188] |
| Added | We added a note for the *Delete Assigned Team Goals* permission. | Permissions for the Latest Team Goals [page 198] |
| Changed | We updated the prerequisites for adding a SMART goal wizard. | Adding Goal Wizard [page 62] |
| Changed | We removed the unsupported type `emun` for `name` and `desc` fields. | Standard Goal Fields [page 31] |
| Changed | We updated the support for People Analytics. | Custom Fields [page 40] |
| Added | We added a note about generation of home page cards. | Important Notes About Goal Management on the Latest Home Page [page 181] |
| Changed | We moved `id` and `type` from the subelement table to attribute table. | Subelements and Attributes of Fields [page 28] |
| Added | We added configuration details about the `control-category-element` attribute. | Defining Category and Default-Category [page 65] |

| Type of Change | Description | More Info |
|---|---|---|
| Added | We added information and links about features supported and not supported in the latest Goal Management. | Using Goal Management on Mobile Apps [page 202] |
| Changed | We deprecated several topics with outdated information. | |
| Changed | We corrected linguistic errors or typos. | Assigning or Unassigning a Team Goal [page 112]<br>Assigning a Group Goal [page 105]<br>Sharing or Unsharing a Team Goal [page 111] |

## 2H 2022

| Type of Change | Description | More Info |
|---|---|---|
| **February 17, 2023** | | |
| Added | We added information about the integration with Multiple Employment. | Integrating with Multiple Employment [page 176] |
| Changed | We added the character limit and other information for the "comment" field in the latest Goal Management. | Enabling Goal Feedback [page 74]<br>Changes to Goal Plan Templates [page 188] |
| Changed | We added an important note explaining the necessity of setting `complete` as the last value for the `state` field. | Important Notes About Goal Management on the Latest Home Page [page 181] |
| Added | We added a note about the permission validation for deleting goals from the Performance Management form when auto-sync is enabled. | Integrating with Performance Management [page 174] |
| **December 9, 2022** | | |
| Changed | We removed the "comment" field from the Unsupported Fields table because it's now supported. | Changes to Goal Plan Templates [page 188] |
| Changed | We updated the DTD file download path. | DTD for Goal Plan Templates [page 18] |
| Changed | We called out unavailability of the dynamic assignment feature. | Enabling the Latest Team Goals [page 197] |
| Changed | We specified the optional step for enabling Goal Management. | Enabling Goal Management [page 14] |
| Changed | We added a supported feature for end-users: Automatic population and calculations. | Overview of the Latest Goal Management [page 184] |

| Type of Change | Description | More Info |
| --- | --- | --- |
| Changed | We reorganized information about Goals Management on the latest home page into two pages. | Goal Management on the Latest Home Page [page 177]<br>Important Notes About Goal Management on the Latest Home Page [page 181] |
| Changed | We deleted the page about how to show the Goal Management tile on the legacy home page because the legacy home page is no longer supported. | |
| **October 28, 2022** | | |
| New | We deleted the page about how to show the Goal Management tile on the legacy home page because the legacy homeWe added a new chapter about team goals in the latest Goal Management. | Team Goals in the Latest Goal Management [page 196] |
| Changed | We updated a note about template containing data of group goals. | Converting Existing Goal Plan Templates [page 195] |
| Changed | We added a note about the `max-weight-per-obj` and `min-weight-per-obj` attributes. | Changes to Goal Plan Templates [page 188] |
| Changed | • We removed some features that are currently supported:<br>  ◦ Team and group goals<br>  ◦ Commenting on goals<br>  ◦ Adding goals by copying from other goal plans<br>• We added a note about the unavailablity of creating goals through the SMART Goal Wizard.<br>• A feature limitation is added: Searching for inactive users | Reduced Scope of the Latest Goal Management [page 187] |
| Changed | We added the following supported features for end-users:<br>• Create, edit, delete, assign, unassign, and share ownership of team goals<br>• Add, edit, and delete threaded comments on goals<br>• Copy personal goals from goal plans | Overview of the Latest Goal Management [page 184] |
| Changed | We added a note to clarify that only English-idiomatic writing rules are supported in the CSV file. | CSV File Format [page 89] |

| Type of Change | Description | More Info |
|---|---|---|
| Changed | • We removed content about the `field-mapping` attribute due to its deprecation.<br>• We added a note to clarify that only custom goal libraries are supported in the latest Goal Management. | Mapping of Goal Library Content to Goal Plans [page 98] |
| Changed | We removed content about the `field-mapping` attribute due to its deprecation. | Adding Goal Wizard [page 62] |
| Changed | We updated the quick action name from *Manage Goals* to *My Goals*. | Goal Management on the Latest Home Page [page 177] |
| Changed | We updated the caution content with feature limitations mentioned. | Working with the Latest Goal Management [page 183] |
| Changed | We added permissions required to copy goals. | Copying and Exporting Goals [page 114] |
| Changed | We updated information and screenshot about the *Summary* section. | My Goals View [page 100] |
| Changed | We corrected information about the required role-based permission. | Integrating with Continuous Performance Management [page 175] |
| Changed | We removed Career Development Planning switches that are not related to goal plan templates. | Goal Plan Template Switches [page 25] |
| Changed | We added columns that only the Milestone table has. | Table Fields [page 35] |
| Changed | We updated the answer to the question "Is Team Goal stored as a type of goal that we can report on, like Group vs Personal? What reporting schema will be available for Team Goal?" | Team Goals [page 106] |
| Changed | We added a note about goal comment integration with Performance Management forms and 360 Reviews forms. | Enabling Goal Feedback [page 74] |
| Changed | We removed the note about the *TGM Version 10 UI* option. | Enabling Goal Management [page 14] |
| Changed | We removed outdated information. | Import File Processing [page 94] |
| Changed | We corrected linguistic errors or typos. | Understanding Goal ID, GUID, & SUB-GUID [page 93]<br>Goal Import Limitations [page 92]<br>Import File Processing [page 94] |

# 1 Goal Management Overview

SAP SuccessFactors Goal Management enables employees and managers to align individual goals with company business objectives.

SAP SuccessFactors Goal Management helps organizations ensure that all employees are aligned and work on the things that matter most. Therefore, the organizations can bridge the strategy and execution gap and stay on the path to success.

## Main Features of Goal Management

- Goals Library of more than 500 SMART (Specific, Measurable, Attainable, Realistic, and Timely) goals provides instant recommendations.
- Goals can be reinforced everyday with intuitive updating of effort, success probability, and comments.
- Compliance is improved by providing evidence of an objective review process. Plus, Legal Scan helps facilitate compliance with Sarbanes-Oxley and other regulations.
- Managers can set cascading goals and see individual, team, or company-wide progress.

## Target User Groups for This Guide

- Implementation partners who implement Goal Management for customers
- Solution consultants who set up demo systems

# 2 Recommended Implementation Sequence for Goal Management

To help you with your implementation, we recommend following this proven formula. This formula is based on Professional Services expertise.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

| Step Number | Name | Description |
|---|---|---|
| 1 | Set up Goal Management in Provisioning | The initial configuration task to set up Goal Management. For more information, see Enabling Goal Management [page 14]. |
| 2 | Download and configure goal plan template | Download the goal plan template that is used to define the fields and sections that users fill out for their goal plans. You import the template, review, and carry out iterative edits on the XML. For more information, see:<br>• Importing a Goal Plan Template [page 58]<br>• Exporting a Goal Plan Template [page 61] |
| 3 | Define goal categories | Create goal categories that are used to segment the goal plan. For more information, see Defining Category and Default-Category [page 65]. |
| 4 | Define goal fields and actions | Define goal fields and actions including names, start date, metrics, and so on. You configure the visibility and function of those fields and actions. For more information, see Goal Plan Template Elements and Attributes [page 18]. |
| 5 | Define subtables: Targets, Tasks, Milestones, and Comments | Define subtables for the goal field definitions. For more information, see Goal Plan Template Fields [page 26]. |
| 6 | Define Goal Visibility | Set up goal visibility, which determines whether goals are public or private. For more information, see CSV File Format [page 89]. |
| 7 | Define SMART goal wizard | Enable the SMART goal wizard if necessary. For more information, see Adding Goal Wizard [page 62]. |
| 8 | Define Goal Alignment Chart | You can use Goal Alignment Chart to take your large, strategic company goals and break them down so that your employees understand how their daily tasks connect with your overall strategy. For more information, see Goal Alignment Chart [page 120]. |
| 9 | Set up goal library mapping | Define a goal library that can be used to create individuals goals. For more information, see Mapping of Goal Library Content to Goal Plans [page 98]. |
| 10 | Set up goal alignment | Goal alignment creates the connection, sometimes called linkage, between goals on the goal plans of people throughout a company. |

| Step Number | Name | Description |
|---|---|---|
| 11 | Set up role-based permissions | Set up the authorization concept of role-based permissions. For more information, see Role-Based Permissions for Goal Management [page 15]. |
| 12 | Set up field and action permissions | The definitions of field and action permissions specify who can see certain fields and actions, read, and edit them. You define and configure read, write, or no permission to fields and actions on the goal plan by relationship to the subject of the form. For more information, see Permissions for Goal Plan Templates [page 41]. |
| 13 | Define goal plan and form layout | Define the plan layout, which controls how the fields look in Goal Management – on the Goal Plan itself. In addition, the form layout controls how goal fields appear in the Performance Management (PM) form if goals are pulled from the goal plan into the PM form. For more information, see Goal Plan Template Fields [page 26]. |

# 3 Getting Started

## 3.1 Enabling Goal Management

To use Goal Management features, you need to enable related Goal Management options in Provisioning.

### Context

When you enable *Total Goal Management* for a customer, you enable *Total Goal Management* for the entire company. That is, any user accessing *Goals* or *Objectives* within the application invokes the Total Goal Management module.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

### Procedure

1. Log in to Provisioning.
2. Select the company where you want to enable Total Goal Management.
3. Under *Edit Company Settings*, choose *Company Settings*.
4. Select *Goal Management Suite* and *My Goals Tab*.
5. **Optional:** Choose the term, **Goal** or **Objective**, the customer prefers to use from the dropdown list next to the *Change Goal into* option. The option may show as *Change Objective into* according to the last saved settings.

    > i Note
    >
    > - Replacing the text **Objective** with the text **Goal** in an instance can impact Action Search results. Thoroughly test search results after switching from one term to the other. You can add customized search terms using the *Manage Action Search* tool in *Admin Center*.
    > - You can use this option when **only** US English language is needed. If there are other languages enabled for customers, this option applies the US English term Goals to all other languages, overriding the local translation for Objectives. The best practice is to update labels with *Text Replacement*.

## 3.2 Role-Based Permissions for Goal Management

You can access the *Goals* module and manage goal plans by enabling the role-based permissions for Goal Management.

Role-based permissions provide flexibility that allows you to manage permissions based on roles. Users who change roles or positions within your organization automatically lose or inherit permissions.

For details about available role-based permissions for Goal Management, change the filter to adjust your view: List of Role-Based Permissions.

# 4 Working with Goal Plan Templates

A goal plan template is specified in an XML file, defining categories and fields for users' goal plans.

Many behaviors of the Goal Management product are configured through goal plan templates. When you edit goal plan templates, make sure that you use the correct HTML formatting.

> **i Note**
>
> SAP SuccessFactors makes no commitments to any support services for customized HTML formatting. Test and validate your customized HTML formatting.

## Goal Plan Template Elements

A goal plan template consists of the following elements:

- File header
- Template Configuration Options containing Objective Plan Data including:
    - Goal plan id
    - Internal name of the goal plan
    - Optional description of the goal plan
    - Last-modified date
    - Start date of the goal plan
    - Due date of the goal plan
- An option to automatically number goals
- An option to define goal categories and a default or catch-all category
- (For performance goals only) An option to use the Goal Wizard
- Options to replace text
- (For performance goals only) An option to use a goal library
- Definition of the fields to be used in the goal plan and the order in which they're displayed
- Permission settings for modifying a goal plan
- Definition of the goals on a Performance Management form layout
- (For performance goals only) Metric lookup tables
- (For performance goals only) Rules
- (For performance goals only) Calculations

## Goal Plan Template Functions

In a goal plan template, you can do the following:

- Specify the name of the plan.
- Define the goal categories.
- Define the fields to be used in the goal plan.
- Specify which roles have READ and WRITE permissions for each field in the goal plan.
- (For performance goals only) Assign permissions to use Goal Management features, such as Cascade Selected and Delete Selected.
- Define the appearance of goals in the goal plan.
- Define the appearance of goals in a Performance Management form.
- Define which fields are listed and the order in which they appear in the *Add Goal* window.
- Define which fields are required. The red asterisk next to a field name indicates that the user must enter data in the field.

> **i Note**
>
> - The *Swap-Goal-Link* option is not supported in the DTD for Goal Management v12.
> - Goal Management does not support competencies.

## 4.1 Basics About Goal Plan Templates

Learn about the basic concepts related to goal plan templates.

DTD for Goal Plan Templates [page 18]
The Document Type Definition (DTD) file for the SAP SuccessFactors Objective Management 4.0 (`objective-template_4_0.dtd`) defines the structure and all legal elements and attributes of the goal plan template XML file.

File Header [page 18]
The file header is the first element in the goal plan template.

Goal Plan Template Elements and Attributes [page 18]
The `<obj-plan-template>` tag is the root element of a goal plan template. This tag contains various elements and attributes.

Goal Plan Template Switches [page 25]
Switches are used to enable or disable features in a goal plan template. The default value of the switches is `off`.

Goal Plan Template Fields [page 26]
The `<field-definition>` element defines each of the fields in a goal.

### 4.1.1 DTD for Goal Plan Templates

The Document Type Definition (DTD) file for the SAP SuccessFactors Objective Management 4.0 (`objective-template_4_0.dtd`) defines the structure and all legal elements and attributes of the goal plan template XML file.

Because not all of the attributes are included in the default XML file, you can refer to this DTD file to find additional required attributes and the correct order.

To download the latest DTD file, go to Partner Portal. Go to *Products* > *Human Capital Management* > *SAP SuccessFactors HXM Suite* > *Implement*, and under *Top Assets*, choose *Access SAP SuccessFactors DTD configuration files*.

### 4.1.2 File Header

The file header is the first element in the goal plan template.

The file header declares the DTD for the SAP SuccessFactors Objective Management 4.0 deployment descriptor. All such deployment descriptors must include a `DOCTYPE` of the following format:

```
<!DOCTYPE obj-plan-template PUBLIC "-//SuccessFactors, Inc.//DTD Objective Template
4.0//EN" "objective-template_4_0.dtd">
```

### 4.1.3 Goal Plan Template Elements and Attributes

The `<obj-plan-template>` tag is the root element of a goal plan template. This tag contains various elements and attributes.

The definition for the basic `<obj-plan-template>` tag in the DTD file is as follows:

```
<!ELEMENT obj-plan-template (obj-plan-id?, obj-plan-type?, obj-plan-name+,
obj-plan-desc?, obj-plan-lastmodified?, obj-plan-start?, obj-plan-due?, obj-plan-
numbering?, category-config?, add-wizard?, text-replacement*, obj-library?,
learning-activities?, category*, default-category?, field-definition+, permission*,
field-permission*, plan-layout, form-layout, pdf-layout?, details-layout)>
<!ATTLIST obj-plan-template
spellchk (true | false) “false”
instructions-viewdefault (on | off “off”
alerts-viewdefault (on|off “off”
cascade-parent-viewdefault (on | off | disable) “off”
cascade-child-viewdefault (on | off | disable) “off”
new-obj-share-status-public (true | false) “false”
share-confirm  (true | false) “false”
unshare-confirm (true | false) “false”
allow-group-goal (true | false) “false”
goal-tree-link (true | false) “false”
pager-max-objs-per-page CDATA #IMPLIED
pager-max-page-links CDATA #IMPLIED
pager-max-children-per-parent CDATA #IMPLIED
display-alignment-format (names | goals) “names”
use-text-for-privacy (true | false) “false”
>
```

### 4.1.3.1 Elements of a Goal Plan Template

This table describes elements that you can specify in the `<obj-plan-template>` tag.

| Elements | Description | Additional information |
|---|---|---|
| obj-plan-id | The unique number that identifies the goal plan | Numbers are assigned as follows:<br>• 1–1000 for Total Goal Management<br>• 2001–3000 for Individual Development Plan<br>• 4001–5000 for Learning Activity<br>• 5001–5099 for Career Worksheet |
| obj-plan-type | Goal plan type | This element is used to differentiate between the types of plans. Values for this field are as follows:<br>• Business (Indicates goal plan)<br>• Development (Indicates development plan)<br>• LearningActivity (Indicates link between learning and development plan or link between learning and performance goal plan)<br>• CareerWorksheet (Used for competency of the current or future job role, short as "CWS") |
| obj-plan-name | Name of the goal plan | This name appears in the UI. The user selects the name in a dropdown list.<br>**i Note**<br>Do not include special or non-English characters within the `obj-plan-name` tag. For example, # or é. You might encounter errors when you export the goal plan. |
| obj-plan-desc | Goal plan description | The description does not appear in the UI. |
| obj-plan-lastmodified | Last-modified date | This field is automatically updated when the XML file is successfully uploaded into Provisioning. |
| obj-plan-start | Start date of the goal plan | Format must be MM/DD/YYYY. This element establishes the default value for the start date for each goal. |
| obj-plan-due | Due date of the goal plan | Format must be MM/DD/YYYY. This element establishes the default due date for each goal. |
| obj-plan-numbering | Option to automatically number goals | For further information, see Enabling Automatic Goal Numbering [page 67]. |

| Elements | Description | Additional information |
|---|---|---|
| add-wizard | (For performance goals only) Option to use the Goal Wizard | For further information, see Adding Goal Wizard [page 62]. |
| text-replacement | Option to replace text | See the example in Text Replacement in a Goal Plan Template [page 24]. |
| obj-library | (For performance goals only) Option to use a goal library | For further information, see Mapping of Goal Library Content to Goal Plans [page 98]. |
| category | Option to define goal categories | For further information, see Defining Category and Default-Category [page 65]. |
| default-category | Option to define a default or catch-all category | For further information, see Defining Category and Default-Category [page 65]. |
| field definition permission | A list of general permissions | For further information, see Goal Plan Template Fields [page 26]. |
| field-permission | A list of goal field permissions | For further information, see Goal Plan Template Fields [page 26]. |
| plan-layout | The layout specification of a goal plan | For further information, see Goal Plan Template Fields [page 26]. |
| form-layout | Option to define how goal plan fields appear on a Performance Management form | For further information, see Defining Goal Plan Field Layout in a Performance Management Form [page 77]. |
| pdf-layout | Not used | |
| details-layout | Not used | |
| learning-activities template-id | (For development goals only) Option to associate a goal with learning activities | For further information, see Importing Learning Activity Templates. |

## 4.1.3.2 Attributes of a Goal Plan Template

This table describes attributes that you can specify in the `<obj-plan-template>` tag.

| Attributes | Valid Values | Description | Default |
|---|---|---|---|
| spellchk | true | A *Spell Check* link is displayed above the field. Only applies to fields of the type textarea. | false |
| | false | Disables the spelling check for all goals. | |
| new-obj-share-status-public | true | Goals are created as shared or public goals. | false |
| | false | Goals are created as private goals. | |

<table>
<tr><th>Attributes</th><th>Valid Values</th><th>Description</th><th>Default</th></tr>
<tr><td rowspan="2">instructions-viewdefault</td><td>on</td><td>Sets the Display Options checkbox to automatically display Instructions to new users.</td><td rowspan="2">off<br><br>Note<br><br>This attribute only works with Goal Management (GM) v11. Do not use this attribute if you're using GM v12.</td></tr>
<tr><td>off</td><td>Instructions are not displayed until users select the Display Options Instructions checkbox.</td></tr>
<tr><td>alerts-viewdefault</td><td>on</td><td>Selects the Alerts option in the Display Options dropdown list to automatically display alerts to users.<br><br>Note<br><br>In the goal plan XML template, alerts can be configured to display by default. Alerts appear when any of the following events occur on the goal plan:<ul><li>Goal is created by another user on your plan.</li><li>Goal is aligned to another goal by another user.</li><li>Goal is modified by another user.</li><li>Aligned up goal is modified by the goal owner.</li><li>Aligned up goal is deleted by the goal owner.</li><li>Aligned up goal is unaligned by another user.</li><li>Aligned down goal is modified by the goal owner.</li><li>Aligned down goal is deleted by the goal owner.</li></ul></td><td>on</td></tr>
</table>

| Attributes | Valid Values | Description | Default |
|---|---|---|---|
| | off | On-plan alerts are not displayed until the user selects the *Alerts* option in the *Display Options* dropdown list. | |
| (For performance goals only) cascade-parent-viewdefault | on | In the current version, only `off` or `disable` is allowed to meet accessibility requirements. | off |
| | off | | |
| | disable | | |
| (For performance goals only) cascade-child-viewdefault | on | In the current version, only `off` or `disable` is allowed to meet accessibility requirements. | off |
| | off | | |
| | disable | | |
| new-obj-share-status-public | true | Sets newly created goals as public. | false |
| | false | Sets newly created goals as private. | |
| expand-collapse-categories | true | When the value is set to `true`, users can expand or collapse categories on the Goal Management page. This attribute only works when `pager-max-objs-per-page` is set to `0`. | |
| | false | | |
| share-confirm | true | Displays a Windows dialog box prompting the user to confirm changing the state of a goal from `unshared` to `shared`. | false |
| | false | Allows users to change the state of a goal from `unshared` to `shared` without further confirmation. | |
| unshare-confirm | true | Displays a Windows dialog box prompting the user to confirm changing the state of a goal from `shared` to `unshared`. | false |
| | false | Allows the user to change the state of a goal from `shared` to `unshared` without further confirmation. | |
| (For performance goals only) allow-group-goal | true | Allows the goal administrator to create and assign group goals. This attribute enables goals for workgroups reporting to the same manager. | false |
| | false | Group goals are disabled. | |

| Attributes | Valid Values | Description | Default |
|---|---|---|---|
| (For performance goals only) goal-tree-link | true | Creates an icon that links users to the *Goal Alignment Spotlight* report directly from their goal plan. | false |
| | false | The icon is not enabled. | |
| pager-max-objs-per-page | <number> | Sets the number of goals displayed per page on the goal plan. If the value is set to 0, all goals are displayed on one page. | |
| pager-max-page-links | <number> | Obsolete | |
| pager-max-children-per-parent | <number> | Obsolete | |
| (For performance goals only) more-details-child-format | original | Displays aligned down goals as a list, showing only the full name, user name, and goal name.<br><br>See the example in more-details-child-format=original [page 24]. | original |
| | goal-plan | Displays aligned-down goals in a format similar to viewing goals in a plan.<br><br>See the example in more-details-child-format=goal-plan [page 25]. | |
| show-goal-id | true | Displays `goal-id` on the Goal Plan page as a column, on the Goal Detail page, and on the Edit Goal page. | false |
| | False | Does not display the `goal-id`. | |
| (For performance goals only) display-alignment-format | names | Displays the goal owner name and contains a link to view the goal on that user's plan. | |
| | goals | Displays the owner, goal name, and other fields that are hard coded to display. | |
| use-text-for-privacy | true | Text is displayed to show goals as public or private. Additionally, a goal can be set as public or private when the goal is created. | false |
| | false | Icons are displayed to show goals as public or private. | |

## 4.1.3.3 Examples of Elements and Attributes

Refer to examples of some elements and attributes.

### First Part of a Goal Plan Template

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE obj-plan-template PUBLIC "-//SuccessFactors,  Inc.//DTD Objective
Template 4.0//EN""objective-template_4_0.dtd">
<obj-plan-templatespellchk="true"new-obj-share-status-public="true"instructions-
viewdefault="on"alerts-viewdefault="on"cascade-parent-viewdefault="off"cascade-
child-viewdefault="off"pager-max-objs-per-page="10"pager-max-page-links="9"pager-
max-children-per-parent="0"display-alignment-format="goals"more-details-child-
format="goal-plan"share-confirm="false"unshare-confirm="false"allow-group-
goal="true"goal-tree-link="false">
<obj-plan-id>3</obj-plan-id>
<obj-plan-type>Business</obj-plan-type>
<obj-plan-name>2006 Goals</obj-plan-name>
<obj-plan-desc><![CDATA[This is the goal plan for 2006.*]]></obj-plan-desc>*
<obj-plan-lastmodified>5/29/04 4:02 PM</obj-plan-lastmodified>
<obj-plan-start>01/01/2006</obj-plan-start>
<obj-plan-due>12/31/2006</obj-plan-due>
<obj-plan-numbering>
<obj-plan-number-format><![CDATA[#.]]></obj-plan-number-format>
<obj-plan-number-format><![CDATA[#.]]></obj-plan-number-format>
<obj-plan-number-format><![CDATA[#.]]></obj-plan-number-format>
</obj-plan-numbering>
```

### Text Replacement in a Goal Plan Template

```
</obj-plan-numbering>
  <text-replacement for="Instructions">
    <text><![CDATA[<P>Check out our SuccessFactors website!</P>]]></text>
  </text-replacement>
  <text-replacement for="category">
    <text><![CDATA[Goal Classification  ]]></text>
  </text-replacement>
  <obj-library name="SuccessFactors Library">
```

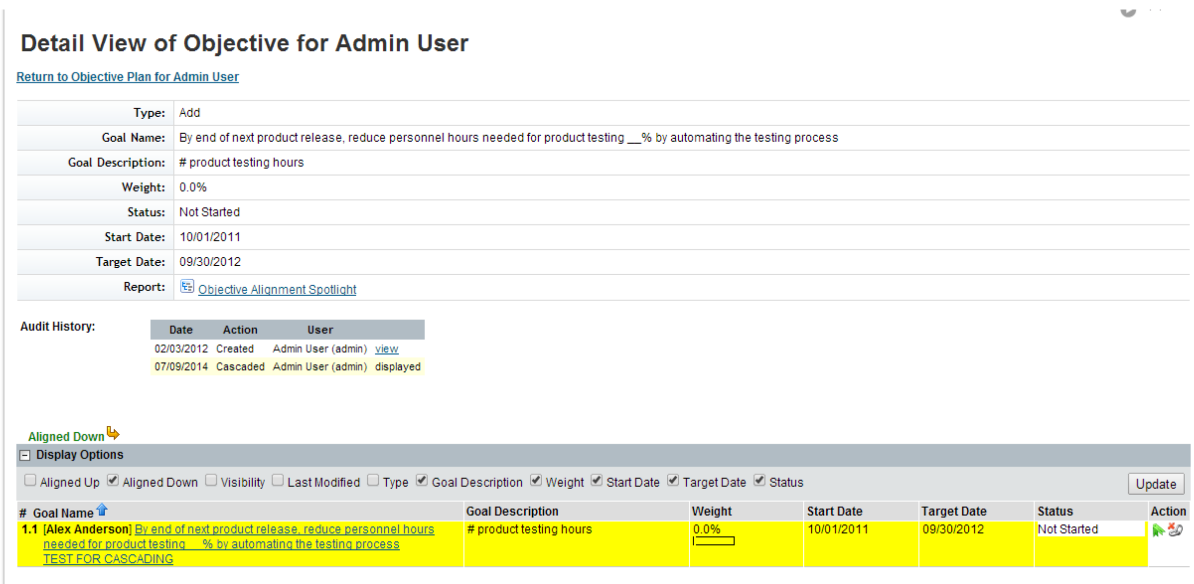
```
<text-replacement for="percentage-symbol">
<text><![CData[]]></text>
<text-replacement>
```

### Screenshots of the Effect of `more-details-child-format`

- `more-details-child-format=original`:



- `more-details-child-format=goal-plan`:





### 4.1.4 Goal Plan Template Switches

Switches are used to enable or disable features in a goal plan template. The default value of the switches is `off`.

#### Supported Switches in Goal Plan Templates

| Switches | Descriptions |
| --- | --- |
| cascader-role | (For performance goals only) Indicates whether the cascader role is enabled. |

| Switches | Descriptions |
|---|---|
| turnoff-add-personal-goal-button | (For performance goals only) Indicates whether the add-personal-goal button is removed from the Goal Wizard. |
| percentage-value-over-100 | Indicates whether the number that is entered in the percentage field can be over 100. |
| threaded-feedback | Indicates whether the threaded feedback feature is enabled. |
| continuouspm-integration | Indicates whether the Continuous Performance Management integration column displays. |
| development-scorecard-show-all-goals | (For development goals only) Indicates whether users' development goals are shown in the Development Goals block in People Profile. |

### An Example of Switches in a Goal Plan Template

The following example shows that the `percentage-value-over-100` switch is enabled.

```
<switches>
<switch for="percentage-value-over-100" value="on"/>
</switches>
```

### Related Information

Configuring the Transcript Template
Configuring Template to Show All Development Goals in the Block
Career Worksheet Templates

## 4.1.5 Goal Plan Template Fields

The <field-definition> element defines each of the fields in a goal.

> **Note**
>
> This is an SAP SuccessFactors Business Beyond Bias feature. Use it to support processes that detect, prevent, or eliminate the influence of bias, helping you achieve your diversity and inclusion goals.

### DTD Definition for the <field-definition> Element

```
<!ELEMENT field-definition (field-label+,  field-description*,
```

```
      table-row-label*, enum-value*, table-column*,  default-value?, field-format?,
rating-scale?,
      field-show-coaching-advisor?)><!ATTLIST  field-definitionid ID #REQUIREDtype
(text | textarea | date | percent | bool | enum | table |  number |
      comment | rating | competencies) #REQUIREDrequired (true | false)
"false"detail (true | false) "false"viewdefault (on | off) "on"showlabel (true |
false) "false"reportable (field1 | field2 | field3 | field4 | field5 | field6 |
field7
      | field8 | field9 | field10 | field11 | field12 | field13 | field14 |
field15 | field16 |
      field17 | field18 | field19 | field20)  #IMPLIEDfield-show-coaching-advisor
(true |  false) "false">
```

→ Remember

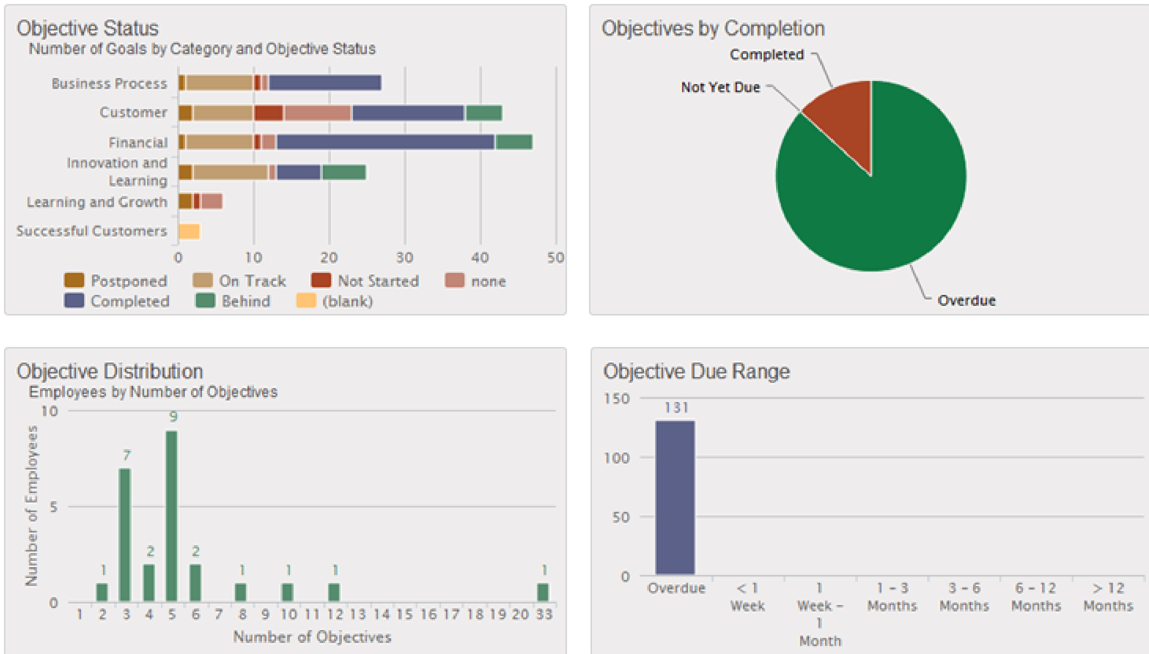
This code snippet is a sample configuration. The exact configuration depends on your system settings.

## Important Notes for Defining the <field-definition> Element

- You must define all fields that are used in the plan in this section.
- The order in which the fields are defined determines the order in which they're shown in the goal plan and goal edit window.
- When you add a new field or remove an existing field from the goal plan template, remember to add or remove the field references in these sections of the template:
  - <field-definition> section
  - <field-permission> section
  - `<plan-layout>` section
  - `<form-layout>` section

  → Remember

  When you delete a field from the goal plan template, using either the *Admin Center* > *Manage Templates* tool or the XML file, do remember to delete the corresponding permissions of that field from the <field-permission> section of the goal plan template. If you delete a field without deleting its permissions from the goal plan template, you might encounter errors while using the goal plan.
- When you decide which fields are included in a goal plan, be aware of the following:
  - It's important to determine what portlets under *Summary* on the *Goal Plan* page are used for reporting on goals. The *Objective Status* portlet uses the `Status` field. The *Objectives by Completion* and *Objective Due Range* portlets use the `% Complete` field and the `Due` field. They don't recognize completed goals because they don't use the `Status` field.




- The Goal List report on the *Goal Plan* page displays fields set with certain defaults that individual users can reset. The administrator can't set these defaults for the entire organization. If users deselect fields through *Display Options*, these fields disappear from the report.

## 4.1.5.1 Subelements and Attributes of Fields

The tables describe subelements and attributes of fields in a goal plan template.

### <field-definition> Subelements

Fields in a goal plan are controlled by `<field-definition>` elements in a goal plan template XML. Each field has its own unique field definition and `<field-definition>` includes the following subelements:

| Subelements | Description |
|---|---|
| field-label | The field label that is displayed in the goal plan template. It can be configured to use whatever term the customer wants. |
| field-description | Used to put an internal comment. It doesn't display on the UI. |
| default-value | Optionally used to specify a default value. |

### Goal Plan Field Attributes (Properties)

In addition to the subelements, you can also configure attributes for a `<field-definition>` element.

| Attributes | Valid Values | Default Value | Description |
|---|---|---|---|
| id | Standard field IDs | | The internal name of the field where the data is stored in the database. For the list of standard field IDs, see Standard Goal Fields [page 31]. In addition, you can define custom field IDs. |
| type | • *text*: a single line of text (nontyped)<br>• *textarea*: multiple lines of text (nontyped)<br>• *date*: a date (`MM/DD/YYYY`) (typed)<br>• *percent*: an unformatted number (no "%" sign) (typed)<br>• *enum*: an enumerated type (shown as a pull-down list; see Enum Fields [page 39] for details)<br>• *table*: a table of data<br>• *number*: a number value (typed)<br>• *link*: a link to a URL that creates a popup window<br>• *bool*: true or false (shown as a checkbox) | | The type of the field. This attribute is a combination of the stored-data type and UI hints.<br><br>We strongly recommend that you use the types as illustrated in the XML because these types have been heavily tested and approved.<br>You must enter dates in `date` fields and numbers in `percent` fields (numbers are rounded to the nearest whole number and appended with a "%" sign).<br><br>**Note**<br>If you define any field with `type="percent"` and want users to be able to enter a value greater than 100 in that field, set the value of the `percentage-value-over-100` switch to `on` in the template XML. |
| required | true<br><br>false | false | • If true, the field is required and a red asterisk appears next to it.<br>• If false, the field isn't required and the field can be left empty. |
| detail | true<br><br>false | false | This attribute isn't currently used, and you can leave it at the default setting. |
| viewdefault | on<br><br>off | on | Determines whether the *View Option* (or *Display Options* as it is sometimes called) for this field is on or off in the plan view. |

| Attributes | Valid Values | Default Value | Description |
|---|---|---|---|
| showlabel | true<br><br>false | false | Field labels aren't displayed by default when you view goals in the goal plan but they're always displayed when you create or edit a goal.<br><br>• If the plan column headings or table column headings are adequate in representing the fields displayed, you may not need to display field labels. Not showing field labels helps reduce vertical scrolling when viewing goals in the plan. For this configuration, set this attribute to *false*.<br>• If fields aren't in the first row of the goal plan (plan column headings), especially if the fields in those rows aren't the table fields (tasks, targets, milestones), consider displaying field labels. For this configuration, set this attribute to *true*. |
| reportable | fieldX (where X is the ID of the field) | | Determines which fields are available in the Goal List report.<br><br>Only custom fields need this attribute. All standard fields are reportable by default.<br><br>For more details, see Custom Fields [page 40]. |
| field-show-coaching-advisor | true<br><br>false | false | If true, the link to the Coaching Advisor displays above the field.<br><br>Only applies to fields of type textarea. |

| Attributes | Valid Values | Default Value | Description |
|---|---|---|---|
| spellchk | true<br>false | false | • If true, a *Spell Check* link is displayed above the field. Only applies to fields of type textarea.<br>• If false, spell checking for all goals is disabled. |

## 4.1.5.2 Standard Goal Fields

The table shows the list of standard goal fields.

Standard Goal Fields

| Field ID | Type | Typical Usage / Characteristics |
|---|---|---|
| name | • text<br>• textarea | The name of the goal, sometimes relabeled as the goal description. This is the only mandatory field in a goal plan.<br>**Note**<br>Whenever you use this field, the field value appears in a larger font on the application UI only when the field is positioned as the first column within the goal plan table. However, when you print the goal plan, this field value always appears in a larger font regardless of the field's position within the goal plan table. |
| desc | • text<br>• textarea | Used for a detailed goal description if the `<name>` field is used as a short name. |
| metric | • text<br>• textarea<br>• enum | Used to describe how a goal is measured, in other words, success criteria. |
| start | date | The start date of the goal. This field is auto-populated with the start date defined in the `<obj-plan-start>` element. The format is defined by selected language pack. |
| due | date | The due date of the goal. This field is auto-populated with the due date defined in the `<obj-plan-due>` element. The format is defined by the selected language pack |

| Field ID | Type | Typical Usage / Characteristics |
|---|---|---|
| state | enum (use text, textarea with care) | Typically presented as a dropdown list of values with colors to report the goal state or status. Used as such in dashboard reports. Limited to 128 characters. Often labeled *Status*.<br><br>→ Recommendation<br><br>We recommend that you set the label of the last enum value for the `state` field to `complete`. This is because the last enum value triggers the `complete` state of a goal. |
| done | percent | Displayed as a whole number with a graphical progress bar.<br><br>i Note<br><br>If you define this field with `type="percent"` and want users to be able to enter a value greater than 100 in this field, set the value of the `percentage-value-over-100` switch to `on` in the template XML. |

| Field ID | Type | Typical Usage / Characteristics |
| --- | --- | --- |
| weight | • number (recommended)<br>• percent (recommended)<br>• enum<br>• text<br>• textarea | The value in this field is used to auto-populate the objective weight when the goal is added to a Performance Management form.<br><br>**i Note**<br>If you define this field with `type="percent"` and want users to be able to enter a value greater than 100 in this field, set the value of the `percentage-value-over-100` switch to `on` in the template XML.<br><br>**→ Remember**<br>• If `weight` is configured as enum, the system doesn't support min or max weight warnings and its value can't be used in calculated ratings.<br>• If `weight` is configured as text, the text value entered is used verbatim; and if configured as text or textarea, this field isn't supported in Table Reporting because the Sub Domain Schema doesn't support nonnumeric values for this field. |
| tasks | table | A table of individual tasks supporting the goal. (See Table Fields [page 35] for more details.) |
| targets | table | A table of individual targets towards achieving the goal. (See Table Fields [page 35] for more details.) |
| milestones | table | A table of individual milestones towards achieving the goal. (See Table Fields [page 35] for more details.) |
| metric | text | Defines a measurement for the goal, for example, percentage of completion. |
| comments | comment | Used to configure the layout and permission for public comments. This field is read-only and automatically includes the name and date stamp when the comments were entered. |

| Field ID | Type | Typical Usage / Characteristics |
|---|---|---|
| group-rating | rating | (For performance goals only) Enables group goal rating directly in the goal, for when the goal is rated once for all participants. Only the group goal owner can modify this field. See Group Goals [page 101] for details. |
| group-rating-comments | rating | (For performance goals only) Allows the group goal owner to enter rating comments. See Group Goals [page 101] for details. |
| obj-plan-field1 | text | Reinforces messages to employees on why they execute on the goals assigned to them.<br>**i Note**<br>The field is introduced as a Mission Statement, however, it can be reused for other purpose with a different field-label. |

Consider the following scenarios when you configure the field length:

- **Empty value**: Initialized as "0" at backend. Uses default values as described in the following table.
- **0 < X < 4000**: Uses customized value "X".
- **>4000**: Initialized as "0" at backend. Uses default values as described in the following table.

In general, all text fields have a default maximum length of 4000 characters. Some exceptional field types have different maximum default lengths. Here are the corresponding default maximum length for the respective field types:

Maximum Default Character Lengths for Different Fields

| Field Type | Description | Maximum Field Length |
|---|---|---|
| TYPE_TEXT | General text field | 4000 characters |
| OBJ_MILE_TARGET_MAX_LENGTH | Milestone target | 8000 characters |
| OBJ_MILE_DESC_MAX_LENGTH | Milestone description | 2048 characters |
| OBJ_MILE_ACTUAL_MAX_LENGTH | Milestone actual | 2048 characters |
| OBJ_COMMENT_MAX_LENGTH | Goal description | 4000 characters |
| OBJ_PLAN_DESC_MAX_LENGTH | Goal plan description | 2048 characters |

**i Note**

If the content that you enter in a text field is without natural spaces, the user interface doesn't wrap the text. For example, if you enter "testesttesttesttesttesttesttestesttesttesttesttesttest", the user interface treats the content as a single word and introduces a horizontal scroll bar instead of wrapping the text.

### Example: XML Example: Standard Fields

```
<field-definition id="name" type="textarea" required="true" detail="false"
viewdefault="on" showlabel="false"
      field-show-coaching-advisor="false">
<field-label>Goal Name*</field-label>
<field-description>Goal Name</field-description>
</field-definition>
<field-definition id="done" type="percent" required="true" detail="false"
viewdefault="on" showlabel="false"
    field-show-coaching-advisor="false">
<field-label>% Complete</field-label>
<field-description>Percent Complete</field-description>
<default-value>0.0</default-value>
</field-definition>
```

## 4.1.5.3 Table Fields

Learn about the supported table fields: Task, Milestone, Target, and Achievement Lookup.

A table field is a collection of fields that can be repeated for each goal. For example, each goal may have several Tasks or Milestones associated with it. Tables can be renamed. For example, you can relabel the Task table as <Subgoals>, <Activities>, or <Notes>.

You can use Permission tags to control who can create, modify, or delete rows of a table within a goal plan. You can also set access permission for individual table columns.

Table Field Types

| Table | Field ID | Must be of Type | Maximum Field Length | Notes |
|---|---|---|---|---|
| • Tasks<br>• Milestones | desc | textarea or text | 2048 characters | • These are columns that both the Milestone and Task tables have.<br>• In the Task table, start and due dates are auto-populated with the same dates entered for the goal whereas in the Milestone table they are not. |
| | start | date | | |
| | due | date | | |
| | date | date | | |
| | done | percent | | |
| | complete | bool | | |
| | target | textarea or text | 2048 characters | |
| | actual | textarea or text | 2048 characters | |
| Milestones | customNum1 | number | | These are columns that only the Milestone table has. |
| | customNum2 | number | | |
| | customNum3 | number | | |
| | rating | number | | |
| | weight | number | | |
| | score | number | | |

| Table | Field ID | Must be of Type | Maximum Field Length | Notes |
|---|---|---|---|---|
| | actualNumber | number | | |
| Targets | target | textarea or text | | |
| | actual | textarea or text | | |
| | date | date | | |
| Achievement Lookup | achievement | number | | |
| | achievement-text | text | | |
| | rating | number | | |
| | description | text | | |

Columns can be arranged in any order. You can add or remove columns as the customer requires, provided that the column types match those types in the *Table Field Types* table shown. The date and percentage columns can't be transformed to text fields.

Table Field Subelements

| Subelements | Description |
|---|---|
| `table-row-label` | The label displayed on the UI. The word "Add" is always pre-pended to the label specified. For example, "Task" is shown as "Add Task". |

| Subelements | Description |
|---|---|
| `table-column id` | The internal name for the field where the data is stored in the database.<br><br>Refer to the list of standard field IDs in the *Table Field Types* table. You can't add custom fields to a table.<br><br>Each `table-column id` has the following attributes:<br>• `column-label`<br>• `column-description`<br>• `type`<br>• `default-value` (optional)<br><br>You can change the values in the label or description attributes but you must not change the IDs that are referenced because these IDs are recognized by the system.<br><br>The following additional attributes are available for this subelement:<br>• `width`: Specifies the width of the column in characters. For columns of type `textarea`, specify a value to provide enough space for the user input. For all other column types, ignore this attribute.<br>• `validate-start-before-due`: Applicable to all table columns that have the field ID `start` and type `date`. If this attribute is set to `true`, the start date is before the due date.<br><br>**i Note**<br>Typically, the Milestone table validates that the start date value is earlier than the due date value. However, because you can relabel table fields as, for example, `<target>` and `<actual>`, the validation may not be desirable. To avoid this, you can set this attribute to `false` for the `start` field. |
| `column-label` | The label that identifies the columns that appear in a table. You can configure this subelement to use whatever term the customer wants. |
| `column-description` | Used to put an internal comment. It doesn't display in the instance. |

| Subelements | Description |
|---|---|
| `default-value` | The default or initial value of a field or column. It isn't mandatory.<br>• For fields or columns of type `text` or `textarea`, the value is copied directly to the contents of a field in a new goal, accounting for the locale as specified by the optional `lang` attribute.<br>• For fields or columns of type `date`, `percent`, `number`, or `bool`, the value is specified in a nonlocalized format, and the `lang` attribute isn't allowed. |
| `field-format` | Defines the format of a field or column. You can specify only the following formats:<br>• #.00: Number with two decimals<br>• '#'#: Prefix, formats 123 to "#123"<br>• #%: Convert to integer and append % to the end<br>• integer |

## Example: XML Example: Table Field

```
<field-definition id="tasks" type="table" required="false" detail="false"
    viewdefault="on" showlabel="true" field-show-coaching-advisor="false">
<field-label>Sub-Goals</field-label>
<table-row-label>Sub-Goal</table-row-label>
<table-column id="desc" type="textarea" required="true" width = 50>
<column-label>Sub-Goal Description</column-label>
<column-description>Sub-Goal Description</column-description>
</table-column>
<table-column id="done" type="percent" required="false">
<column-label>Percent Complete</column-label>
<column-description>Percent Complete</column-description>
<default-value>0</default-value>
</table-column>
<table-column id="start" type="date" required="false" validate-start-before-
due="false">
<column-label>Target Date</column-label>
<column-description>Target Date</column-description>
</table-column>
</field-definition>
```

## Related Information

Table Field Permissions
Table Column Permissions [page 53]

# 4.1.5.4 Enum Fields

A field of type enum allows you to specify a dropdown list with all the possible values for the field.

Enum Fields

| Subelements | Description |
| --- | --- |
| `enum-value` | Defines one of the possible values for a field of `<type="enum">`. The order of the `enum-value` subelements in the XML determines the order in which the dropdown list is displayed, and the collation order for sorting by the field.<br>• The `value` attribute defines the nonlocalized, internal string, under which the data is stored. (Use the `enum-label` subelement to define localized string labels).<br>• The `style` attribute optionally defines the background and text color. |
| `enum-label` | The text that displays in the dropdown list. There must be at least one `enum-label` subelement defined per `enum-value`. |

## Example: XML Example: Enum Field

```
<field-
definitionid="state"type="enum"required="false"showlabel="false"viewdefault="on">
<field-label>Status</field-label>
<enum-valuevalue="none"style="background:white;color:black;">
<enum-label>none</enum-label>
</enum-value>
<enum-value value="Will meet target" style="background:green;color:white;">
<enum-label>Will meet target</enum-label>
</enum-value>
<enum-valuevalue="Don't know"style="background:yellow;color:black;">
<enum-label>Don't know</enum-label>
</enum-value>
<enum-value value="Will not meet target"style="background:red;color:white;">
<enum-label>Will not meet target</enum-label>
</enum-value>
<enum-value value="Goal completed"style="background:blue;color:white;">
<enum-label>Goal completed</enum-label>
</enum-value>
</field-definition>
```

## 4.1.5.5 Custom Fields

Custom fields aren't initially defined in the goal plan template. These goal field types aren't listed in the DTD, but they can be defined in the same way as any of the standard fields.

Custom fields can't be of a table type and must be of the following types:

- text
- textarea
- enum
- date
- percent
- number
- link
- bool

Only custom fields need the `reportable` attribute.

| Attribute | Valid Value | Description |
|---|---|---|
| `reportable` | fieldX (where X is the ID of the field) | Determines which fields are available in the Goal List report.<br><br>At most 20 fields **across an entire company** can be reportable. People Analytics is also supported.<br><br>If a company has more than one goal template, all of the `reportable="fieldX"` fields must have the same ID and be of the same type across all goal plans. For example, if you have weight fields in two different goal plan templates, each must have an identical ID. Field IDs typically ensure that they are of the same field type. |

After cascading goals, managers can only see standard fields defined in the DTD from their goal plans. For managers to view custom fields in the alignment view, the attribute `reportable` is required in the XML template as part of custom field definition. Refer to the sample code:

```
<field-definition id="personalmetric" type="enum" required="false" detail="false"
viewdefault="on" showlabel="false" reportable="field1" default-calc-type="step"
field-show-coaching-advisor="false" cascade-update="push-down">
```

> **Note**
>
> When you change which fields are reportable, either by initially making a custom field reportable or changing which reportable fields that you have, that change affects all goals that are saved or edited from that point forward. To retroactively apply the change to existing objectives, in Provisioning, go to the *Ad-Hoc Report Builder* section, find *Objective Management*, and choose the *Synch* button. This allows the new or modified custom field to update correctly in the DB, so it can then be picked up by Table Reports going forward.

> The sync process may add a *modify* record to the audit trail of each goal, so we recommend that you disable the *Goal Modification* email for the duration of the sync process to avoid unwanted emails.
>
> > → Remember
> >
> > As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

## 4.2 Permissions for Goal Plan Templates

Learn about the permission settings in a goal plan template.

Action Permissions [page 41]
Action permissions grant the ability to perform specific actions on a goal plan, such as adding, deleting, or cascading goals. The `<permission>` element describes general goal access permissions, and is referred to as an action permission.

Roles in Goal Plans [page 45]
Roles are established based on what the system knows about relationships as determined by the employee data in the instance. The `<role-name>` element defines who receives permissions.

Field Permissions [page 51]
Use the `<field-permission>` element in the goal plan template to define which roles have read and write permissions for each field in a goal.

Goal Plan States [page 54]
Goal plan states provide the ability to have more than one set of permissions. The difference between states can be subtle or drastic depending on the customer's needs.

### 4.2.1 Action Permissions

Action permissions grant the ability to perform specific actions on a goal plan, such as adding, deleting, or cascading goals. The `<permission>` element describes general goal access permissions, and is referred to as an action permission.

The following table describes the action permissions that you can configure for goals.

| Action Permission | Grant the Ability To |
|---|---|
| Private access (private-access) | See private goals, that is, goals that aren't shared or made public.<br>Employees need this permission to receive email notifications for private goals. |

| Action Permission | Grant the Ability To |
|---|---|
| Create (create) | Create a goal in a user's goal plan.<br><br>A user with this permission sees a *Save as New* button on the *Edit Goal* page. |
| Delete (delete) | Delete a goal from a user's goal plan.<br><br>→ Recommendation<br><br>We recommend that you list roles for this permission.<br><br>In addition, group goals always allow users who create the goal to delete the goal for themselves. |
| Delete group goals (delete-group-goal) | (For performance goals only) Delete a group goal from a user's goal plan. |
| Move goal (move) | Move and indent goals within a user's own goal plan. |
| Share goal (share) | Mark goals as shared or unshared (public or private) in a user's goal plan.<br><br>If no roles are listed for this permission, the *Make Selected Public* and *Make Selected Private* buttons still appear when you view goals in your own plan. However, after you choose the button, a message appears indicating that you don't have permission to perform this operation. |
| Cascade pull (cascade-pull) | (For performance goals only) Pull another user's goals to one's own goal plan.<br><br>The only roles supported for this permission are * (Everyone) and no roles at all. If no roles are listed, the *Cascade to My Plan* button doesn't appear when you view another user's goal plan. |
| Cascade push (cascade-push) | (For performance goals only) Push one's own goals to another user's goal plan.<br><br>If no roles are listed for this permission, the *Cascade to Others* button doesn't appear when you view your own goal plan.<br><br>If you grant this permission to the EX (Matrix Manager), this button appears for all users. Employees without matrix reports can't select any users but can still see the button. |

| Action Permission | Grant the Ability To |
|---|---|
| Align to (cascade-align) | (For performance goals only) Align one's own goals with another user's goals.<br><br>This permission applies when two goals are created individually but you want to link them for reporting purposes.<br><br>If no roles are listed for this permission, the *Align To* button doesn't appear when you hover over a goal in another user's goal plan. |
| Unalign parent (unalign-parent) | (For performance goals only) Unalign a parent (original) goal in a user' own plan.<br><br>If no roles are listed for this permission, the *Unalign* button still appears when you view aligned-up goals in your own plan. However, after you choose the button, a message appears indicating that you don't have permission to perform this operation. |
| Unalign child (unalign-child) | (For performance goals only) Unalign a child (cascaded or aligned) goal in a user's own goal plan.<br><br>If no roles are listed for this permission, the *Unalign* button still appears when you view aligned-down goals in your own plan. However, after you choose the button, a message appears indicating that you don't have permission to perform this operation. |
| Create row (create-row) | (For performance goals only) Create a row in a field type of table (Tasks, Targets, Milestones, or Achievement Lookup).<br><br>You must define which table the permission applies to.<br><br>To revoke this permission from all roles, define the permission with no roles listed. Roles not included in the permission definition don't have rights to create table rows. |
| Delete row (delete-row) | (For performance goals only) Delete a row in a field type of table (Tasks, Targets, Milestones, or Achievement Lookup).<br><br>You must define which table the permission applies to.<br><br>To revoke this permission from all roles, define the permission with no roles listed. Roles not included in the permission definition don't have rights to delete table rows. |

| Action Permission | Grant the Ability To |
|---|---|
| Move row (move-row) | (For performance goals only) Move a row up or down in a field type of table (Tasks, Targets, Milestones, or Achievement Lookup).<br><br>You must define which table the permission applies to.<br><br>To revoke this permission from all roles, define the permission with no roles listed. Roles not included in the permission definition don't have rights to move table rows. |
| Change state (change-state) | Change the state (status) of the current goal. |
| Import goal (import-goal) | Import the user's goals from another goal plan. |
| Export goal (export-goal) | Export the user's goals to another goal plan. |

> **i Note**
>
> The `create-row`, `delete-row`, and `move-row` permissions have a different behavior than the other action permissions when permissions aren't defined. When other action permissions aren't defined, no role has access to those permissions. When the `create-row`, `delete-row`, and `move-row` permissions aren't defined, every role with the write permission to the table has access to those permissions.

## Example

### XML Example: Action Permissions for `private-access`

In this example, employees and their managers can view unshared or private goals.

```
<permission for="private-access">
    <description> Employees and their managers can view unshared or private goals.
</description>
    <role-name>E</role-name>
    <role-name>EM</role-name>
</permission>
```

## Example

### XML Example: Action Permissions for Table Fields

In this example, everyone can create, delete, or move rows of targets, tasks, milestones, or metric lookup tables.

```
<permission for="create-row">
    <description><![CDATA[Anyone can create row.]]></description>
    <role-name><![CDATA[*]]></role-name>
    <field refid="targets"/>
    <field refid="tasks"/>
    <field refid="milestones"/>
    <field refid="metric-lookup-table"/>
</permission>
```

```
<permission for="delete-row">
    <description><![CDATA[Anyone can delete row.]]></description>
    <role-name><![CDATA[*]]></role-name>
    <field refid="targets"/>
    <field refid="tasks"/>
    <field refid="milestones"/>
    <field refid="metric-lookup-table"/>
</permission>
<permission for="move-row">
    <description><![CDATA[Anyone can move row.]]></description>
    <role-name><![CDATA[*]]></role-name>
    <field refid="targets"/>
    <field refid="tasks"/>
    <field refid="milestones"/>
    <field refid="metric-lookup-table"/>
</permission>
```

### Example

#### XML Example: Action Permissions for Goal Import

In this example, employees can go to their goal plans to upload goals for themselves. Employees' managers can go to goal plans of their employees and upload the goals for employees.

```
<permission for="import-goal">
  <description><![CDATA[ Employees' manager can import the goals from the goal
plan. ]]></description>
    <role-name><![CDATA[EM]]></role-name>
    <role-name><![CDATA[E]]></role-name>
</permission>
```

> i Note
>
> For importing the new group goals in the import CSV file, use the TYPE as OBJECTIVE_GROUPV2. The remaining other columns are same as personal goals.

## 4.2.2 Roles in Goal Plans

Roles are established based on what the system knows about relationships as determined by the employee data in the instance. The <role-name> element defines who receives permissions.

### Roles in Goal Plans

The following table lists the supported role names and their descriptions.

| Role Name | Description |
|---|---|
| * | Everyone |

| Role Name | Description |
|---|---|
| E | Employee or owner |
| EM | Employee's manager |
| EMM | Employee's second-level manager |
| EM+ | Employee's manager, all the way up the reporting hierarchy |
| ED | Employee's direct report |
| EDD | Employee's second-level direct report |
| ED+ | Employee's direct report, all the way up the reporting hierarchy |
| EMD | Employee's manager's direct reports (employee's coworkers or peers) |
| EX | Employee's matrix manager |
| EY | Employee's matrix report |
| EH | Employee's HR representative |
| F | Form reviewer (Goal access is restricted through a performance form only.) |
| OP | (For performance goals only) Objective parent (For example, a project team lead's goal that is aligned up from a team member's goal) |
| OC | (For performance goals only) Objective child (For example, a team member's goal that is aligned down from a team lead's goal) |
| Cascader | (For performance goals only) The person who is cascading a goal |

> **i Note**
>
> Roles are case sensitive and you must list them in all uppercase.

## Actions Mapped for Each Role

The following table lists which roles can be assigned access to goal plan features.

| Goal Plan Fea-tures | * | E | EM | EMM | EM+ | ED | EDD | ED+ | EMD | EH | EX | EY | F | OP | OC | No Role | Sug-gessted Roles |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| View pri-vate goals | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | N | E, EM, or OP |
| Cre-ate goals | Y | Y | Y | N | N | N | N | N | N | N | Y | N | Y | N | N | N | E, EM, or F |

| Goal Plan Features | * | E | EM | EMM | EM+ | ED | EDD | ED+ | EMD | EH | EX | EY | F | OP | OC | No Role | Suggessted Roles |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Delete goals | Y | Y | Y | Y | Y | Y | Y | Y | Y | N | Y | Y | N | Y | N | N | E, EM, or OP |
| Move goals | N | Y | N | N | N | N | N | N | N | N | N | N | N | N | N | Y | E |
| Share or unshare goals | N | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | N | N | N | N | E or EM |
| Cascade pull | Y | Y | N | N | N | Y | N | N | N | N | N | Y | N | N | N | Y | * or OFF |
| Cascade push | Y | Y | Y | Y | Y | Y | Y | Y | Y | N | Y | Y | N | N | N | Y | * or OFF |
| Align to | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | N | N | N | Y | *, ED, or ED+ |
| Unalign parent | N | Y | N | N | N | N | N | N | N | N | N | N | N | N | N | N | E |
| Unalign child | N | Y | N | N | N | N | N | N | N | N | N | N | N | N | N | N | E |
| Create row | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | N | N | Y | E or EM |
| Delete row | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | N | N | Y | E or EM |
| Move row | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | N | N | Y | E or EM |

**Note**

- The roles listed are also used to set read and write permissions when accessing goals in an individual's Goal Plan.
  The only exception is that even if OC has write permission, OC can't modify OP's goals.
- The following roles have the same level of support:
  - EX and EM

- EY and ED

### 4.2.2.1 Configuring Cascader Role

Configure the cascader role to specify which goal details are editable when an employee cascades a goal to others.

#### Context

> **Note**
>
> This is an SAP SuccessFactors Business Beyond Bias feature. Use it to support processes that detect, prevent, or eliminate the influence of bias, helping you achieve your diversity and inclusion goals.

The cascader role supports permissions on the following goal elements and actions for users who cascade their goals to other employees:

| Elements | Permission Type |
| --- | --- |
| `<field-permission>` | Field permissions (standard, custom, and table) |
| `<table-col>` | Table column permissions |
| `<permission for="">` | Action permissions for tables:<br>• Create (create-row)<br>• Delete (delete-row)<br>• Move (move-row) |

When the cascader role is disabled, users who cascade a goal have the write access to all fields and actions for that goal regardless of goal plan permissions.

When the cascader role is enabled, the `cascader` role controls what field can be seen and edited and what table actions are permitted for users who cascade their goals to others.

If users don't use role-based permissions (RBP), users can also cascade goals by the permission configured in the goal plan template. You can configure the following cascader settings:

<table>
<tr><th>TGM Permission Setting Mode</th><th>Goal Plan Template Setting</th><th>RBP Setting</th><th>Current Behavior</th></tr>
<tr><td>RBP not enabled</td><td>Cascade push role setting</td><td>N/A</td><td>The cascade permission follows the settings in the goal plan template.<br><br>In the following code, both the employee manager and matrix manager can cascade goals to their direct report and matrix report. If the role is defined as *, anyone can cascade a goal to anyone in the company regardless of the reporting line.<br><br><permission for="cascade-push"><br><description><![CDATA[Management hierarchy can push down through hierarchy.]]></description><br><role-name><![CDATA[EM]]></role-name><br><role-name><![CDATA[EX]]></role-name><br></permission></td></tr>
<tr><td>RBP enabled – example 1</td><td>Cascade push role setting – for example, role defined as EM</td><td>The person being cascaded to is in the target population of the person doing the cascade action</td><td>Combine the settings in the goal plan template with RBP setting.<br><br>For example: Jennifer Lo is in the target population of Carla Grant (RBP setting), and Carla Grant has the cascade permission (settings in the goal plan template); then Carla Grant can cascade a goal to Jennifer Lo.</td></tr>
</table>

| TGM Permission Setting Mode | Goal Plan Template Setting | RBP Setting | Current Behavior |
|---|---|---|---|
| RBP enabled – example 2 | Cascade push role setting – for example, role defined as EM | The person being cascaded to is **not** in the target population of the person doing the cascade action | Combine the settings in the goal plan template with RBP setting.<br><br>For example: Jennifer Lo is **not** in the target population of Carla Grant (RBP setting), and Carla Grant has the cascade permission (settings in the goal plan template); then Carla Grant **cannot** cascade a goal to Jennifer Lo. |

## Procedure

**Enable the `<cascader-role>` Switch**

1. Add the following code in the XML of the goal plan template.

```
<switches>
    <switch for="cascader-role" value="on"/>
</switches>
```

**Configure Field and Action Permissions for the `cascader` Role as Needed**

2. Configure action permissions for tables `<permission for="">` in the XML.

Example

**Table Action Permissions for the `cascader` Role**

```
<permission for="create-row">
    <description><![CDATA[The cascader can create a row in a field of type
table and then he/she cascades a goal]]></description>
    <role-name><![CDATA[cascader]></role-name>
    <field refid="tasks"/>
    <field refid="targets"/>
    <field refid="milestones"/>
    <field refid="metric-lookup-table"/>
</permission>
<permission for="delete-row">
    <description><![CDATA[The cascader can delete a row in a field of type
table and then he/she cascades a goal]]></description>
    <role-name><![CDATA[cascader]]></role-name>
    <field refid="milestones"/>
</permission>
<permission for="move-row">
    <description><![CDATA[The cascader can move a row in a field of type
table and then he/she cascades a goal]]></description>
    <role-name><![CDATA[cascader]]></role-name>
    <field refid="milestones"/>
</permission>
```

3. Configure field permissions (standard, custom, and table) `<field-permission>` in the XML.

> Example
>
> **Field Permissions for the `cascader` Role**

```
<!-- Field Permission Defined -->
<field-permission type="write">
    <description><![CDATA[The goal owner, manager, and cascader can write to
all fields]]></description>
    <role-name><![CDATA[E]]></role-name>
    <role-name><![CDATA[EM]]></role-name>
    <role-name><![CDATA[cascader]]></role-name>
    <field refid="name"/>
    <field refid="desc"/>
    <field refid="metric"/>
    <field refid="start"/>
    <field refid="due"/>
    <field refid="state"/>
    <field refid="tasks"/>
    <field refid="milestones"/>
    <field refid="targets"/>
    <field refid="metric-lookup-table"/>
</field-permission>
```

4. Configure table column permissions `<table-column>` in the XML.

> Example
>
> **Table Column Permissions for the `cascader` Role**

```
<!-- Table Column Permission Defined for Cascader -->
<field-permission type="write">
    <description><![CDATA[The cascader of goal can write to all below]]></
description>
    <role-name><![CDATA[cascader]]></role-name>
    <table-col id="desc" field-refid="tasks"/>
    <table-col id="start" field-refid="tasks"/>
    <table-col id="due" field-refid="tasks"/>
    <table-col id="done" field-refid="milestones"/>
    <table-col id="achievement" field-refid="metric-lookup-table"/>
</field-permission>
```

## 4.2.3 Field Permissions

Use the `<field-permission>` element in the goal plan template to define which roles have read and write permissions for each field in a goal.

You can add field permissions to the goal plan template in the XML only. Field permissions are scanned in XML source order. The last applicable permission is the one that is used. For example, it's common to restrict access to all fields and then selectively allow permissions.

> Note
>
> - Consider action permissions when you grant field permissions. Grant users who can create goals the write permission for all fields or at least all required fields in a goal plan.

- If every individual in a group of people has the same kind of permissions for the same fields, you can put all permissions within one element.

The following table describes the subelements inside the <field-permission> element.

| Subelements | Description |
| --- | --- |
| type | The following three types are available for field permissions:<br>• `none` (default). The user can't see or edit the field at all.<br>• `read`. The user can see but can't edit fields.<br>• `write`. The user can both see and edit fields. |
| description | Store an internal comment. |
| role-name | Enclose each role that is granted read or write access separately within this tag. This tag applies to all permission sections of the goal plan. |
| field-refid | Enclose each field that the role has permission to access separately within this tag. |
| table-col | Enclose each table column field that the role has permission to access separately within this tag. |

## Example

### XML Example: Field Permissions

```
<field-permission type="read">
    <description>Everyone can read name and metric for shared goals.</description>
    <role-name>*</role-name>
    <field refid="name"/>
    <field refid="metric"/>
</field-permission>
<field-permission type="read">
    <description>Direct reports can see all fields for Manager's shared goals.</
description>
    <role-name>ED</role-name>
    <field refid="name"/>
    <field refid="desc"/>
    <field refid="metric"/>
    <field refid="state"/>
    <field refid="due"/>
    <field refid="done"/>
    <field refid="tasks"/>
</field-permission>
<field-permission type="write">
    <description>The owner, manager, and form reviewer can write to all fields.</
description>
    <role-name>E</role-name>
    <role-name>EM</role-name>
    <role-name>F</role-name>
    <field refid="name"/>
    <field refid="desc"/>
    <field refid="metric"/>
    <field refid="state"/>
    <field refid="due"/>
    <field refid="done"/>
```

```
    <field refid="tasks"/>
</field-permission>
```

#### 4.2.3.1 Table Column Permissions

Table column permissions allow you to define permissions for columns in the table.

Supported tables are Tasks, Targets, Milestones, and Achievement Lookup.

## Important Notes for Defining Table Column Permissions

- You can't define table permissions according to rows.
- If table column permissions aren't defined, the columns have the permission level of the table defined in field permissions to ensure backwards compatibility.
- Column level permissions can only be equal to or more restrictive than the field permission for the table. You can't grant a role read permission to a table and then also grant the same role write permission to columns in the table. For this scenario, grant write access to the table and then set table column permissions to read for the columns that you don't want the role to edit.
- Required fields only apply when the role has the write permission to the table column.
- Table column permissions aren't supported in Performance Management forms. Field permissions defined for table columns aren't respected when you include a table in form-layout.

## Best Practices for Defining Table Column Permissions

- Define table column permissions after table field permissions are defined in the XML.
- To hide a table from a role, define none at the table field level. Don't define the write permission for the table at the field level and then set all table columns to none, which causes the table header to remain visible.
- For the Achievement Lookup table,
    - Define the same set of permissions for the table columns *achievement* and *achievement-text*.
    - We don't recommend that you grant action permissions to roles that don't have the write permission for all columns, which can lead to undesirable behavior in the Achievement Lookup table and calculated rating.

## Example

**XML Example: Table Column Permissions**

The use case is to create a Milestone table with four columns: *Milestone*, *Start Date*, *Due Date*, and *% Complete*. The manager (EM) has full access to all columns but the employee (E) only has access to the *% Complete* column.

In this scenario, the manager is responsible for setting the milestones and the employee only for updating the milestone percent completion.

```
<field-permission type="write">
    <description>Manager and Employee can write to the milestone table.</
description>
    <role-name>E</role-name>
    <role-name>EM</role-name>
    <field refid="milestones"/>
</field-permission>
<field-permission type="read">
    <description>Employee can only read the description, start, and due fields.</
description>
    <role-name>E</role-name>
    <table-col id="desc" field-refid="milestones"/>
    <table-col id="start" field-refid="milestones"/>
    <table-col id="due" field-refid="milestones"/>
</field-permission>
```

## 4.2.4 Goal Plan States

Goal plan states provide the ability to have more than one set of permissions. The difference between states can be subtle or drastic depending on the customer's needs.

You can't have permissions outside of goal plan states. Goal plan states control the action and field permissions before and after a goal plan is approved.

The order in which available states are defined in the XML of the goal plan template determines the order in which they're shown in the goal plan.

> **Note**
>
> Group goals don't respect the configuration of goal plan states. If a user has the group goal permission, the user can see *Add Goal* button on the *Goal Plan* page even if a goal plan is in the locked status.

Locking and Unlocking a User's Goal Plan [page 54]
Allow components of the goal to be locked after an authorized user, such as E and EM, locks the plan.

Changing the Goal Plan State on Form Routing [page 56]
You can change the goal plan state of the user when a form is routed to the next step.

### 4.2.4.1 Locking and Unlocking a User's Goal Plan

Allow components of the goal to be locked after an authorized user, such as E and EM, locks the plan.

#### Context

This feature supports the following scenarios:

- A manager can cascade a goal to an employee.
- When the goal is locked, employees can't create, delete, move, cascade, or share goals. They only have the write permission to the `tasks`, `category`, `state` (status), and `% complete` fields. All other fields are read only for them.
- When the goal is unlocked, employees can create, delete, move, cascade, and share goals. They also have the write permission to all fields when adding or editing a goal.

> **i Note**
>
> Group goals and team goals can't be locked down with the goal plan state. This feature only applies to personal goals.

## Procedure

1. Add the `<obj-plan-states>` element after the last `<field-definition>` element in the XML of the goal plan template.

   The `<obj-plan-states>` element can have multiple `<obj-plan-state>` subelements.
2. Configure the following subelements or attributes inside `<obj-plan-states>`.

| Subelements or Attributes | Description |
| --- | --- |
| `obj-plan-state` | Defines the single goal plan state.<br>Each `<obj-plan-state>` element can have its own action and field permissions. |
| `id` | Specifies the internal name of the plan state. |
| `default` | Specifies the default state of the goal plan.<br>Set the value to `true` for only one plan state. |
| `state-label` | Defines the name of the current state. |
| `lang` | Shows the name as per the locale. |
| `action-label` | (Only for the legacy Goal Management) Defines the clickable option name of the goal plan state on the goal plan page. |

> **Example**
>
> **The `<obj-plan-states>` Element**
>
> ```
> <obj-plan-states>
>   <obj-plan-state id="Locked" default="true">
>     <state-label lang="en_GB">Locked</state-label>
>     <state-label lang="en_US">Locked</state-label>
>     <action-label lang="en_US">Lock</action-label>
>     …
>   </obj-plan-state>
> ```

```
</obj-plan-states>
```

3. Add the action permission `change-state` inside `<obj-plan-state>`.

   The `target-state` subelement inside the `change-state` permission defines the goal plan state to which the goal plan can be switched (that is, Locked state and Unlocked state).

   Example

   - **Goal Plan State - Locked**

   ```
   <obj-plan-states>
     <obj-plan-state id="Locked" default="true">
       <state-label lang="en_GB">Locked</state-label>
       <state-label lang="en_US">Locked</state-label>
       <action-label lang="en_US">Lock</action-label>
       <permission for="change-state">
         <description><![CDATA[Manger can change the goal plan state.]]></
   description>
         <target-state><![CDATA[Unlocked]]></target-state>
         <role-name><![CDATA[EM]]></role-name>
       </permission>
       …
     </obj-plan-state>
   </obj-plan-states>
   ```

   - **Goal Plan State - Unlocked**

   ```
   <obj-plan-states>
     <obj-plan-state id="Unlocked" default="true">
       <state-label lang="en_GB">Unlocked</state-label>
       <state-label lang="en_US">Unlocked</state-label>
       <action-label lang="en_US">UnLock</action-label>
       <permission for="change-state">
         <description><![CDATA[Manger can change the goal plan state.]]></
   description>
         <target-state><![CDATA[Locked]]></target-state>
         <role-name><![CDATA[EM]]></role-name>
       </permission>
       …
     </obj-plan-state>
   </obj-plan-states>
   ```

4. **Optional:** Repeat the steps to configure multiple goal plan states inside `<obj-plan-states>`.

# 4.2.4.2 Changing the Goal Plan State on Form Routing

You can change the goal plan state of the user when a form is routed to the next step.

## Context

When the form moves to a state where it's unlocked, the goal plan is in an unlocked state.

ℹ Note

Creating a new form doesn't trigger a change of the goal plan state or put the goal plan back into initial state.

## Procedure

1. Add the `<obj-plan-state-change>` element after the `<meta-grp-label>` element in the Objective section of the Performance Management or 360 form template.

   The `<obj-plan-state-change>` element defines the single goal plan state.
2. Configure the following subelements or attributes:

| Subelements or Attributes | Description |
|---|---|
| `to-step` | Specifies the route step ID. |
| `target-state` | Defines the state to which the goal plan can be switched. |
| `id` | Specifies the internal name of the goal plan state.<br>Set the value to one of the goal plan state IDs defined in the goal template. |
| `to-complete-state` | Specifies whether to change the goal plan state when the form is routed to the complete step. |
| `on-form-delete` | Specifies whether to change the goal plan state when the form is deleted. |

Example

**The** `<obj-plan-state-change>` **Element**

```
<obj-plan-state-change to-step="Step2">
    <target-state id="B"></target-state>
</obj-plan-state-change>
```

You can't specify the `to-step` attribute when configuring either `to-complete-state` or `on-form-delete` attribute.

Example

**The** `to-complete-state` **and** `on-form-delete` **Attributes**

```
<obj-plan-state-change to-complete-state="true">
        <target-state id="A"></target-state>
</obj-plan-state-change>

<obj-plan-state-change on-form-delete="true">
        <target-state id="B"></target-state>
</obj-plan-state-change>
```

3. **Optional:** To change the goal plan state for each route step, add the configuration multiple times.

> Example
>
> **Several** <obj-plan-state-change> **Elements**
>
> ```
> <obj-plan-state-change to-step="Step2">
>     <target-state id="B"></target-state>
> </obj-plan-state-change>
> <obj-plan-state-change to-step="Step3">
>     <target-state id="C"></target-state>
> </obj-plan-state-change>
> ```

## 4.3 Importing a Goal Plan Template

Import a goal plan template so that users can use goal plan features.

### Context

When you enable Goal Management for a customer, you must also import a goal plan template for the company. Otherwise, when a user tries to access Goal Management, an error appears in the browser.

There's no interface in Provisioning that allows you to edit the XML of a goal plan template. Create and edit your goal plan templates using an XML editor and import the goal plan to see your changes.

> Note
>
> Autoprovisioning is also available for some components. The Performance and Goals (Align and Perform) bundle includes the following components: Platform, Goal Management, Performance Management, 360 Reviews, and Calibration. Autoprovisioning allows for these components to be enabled and a base configuration set to be available.

### Procedure

1. Log in to Provisioning.

   > Remember
   >
   > As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

2. Select your target company.
3. Under the *Managing Plan Template* section, select *Import/Update/Export Objective Plan Template*.

4. Browse and select the template file that you prepared.
5. Choose *Upload*.
6. (For importing a new goal plan template only) Go to *Provisioning* > *Company Settings*, locate *Refresh RBP Permission Configuration*, and choose *Refresh*.

> **Note**
>
> When importing a modified goal plan template over an existing one, your changes are reflected in the system right away, even if goals already exist within that goal plan.

### Next Steps

If multiple goal plan templates are imported into an instance, to set the default template, select the radio button in the *Default* column.

## 4.4 Configuring Goal Plan Templates

You can configure your goal plan templates to best suit the business needs of customers through both Admin Center within an instance and in XML.

### Prerequisites

You've imported goal plan templates in Provisioning.

> **→ Remember**
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

### Context

Many changes to a goal plan template can be made through Admin Center, but all changes can be made within the XML of a template.

It's best to perform as much of the configuration as possible in Admin Center, and then export the XML file to make more advanced changes.

## Procedure

1. Go to *Admin Center* > *Manage Templates*.
2. On the *Goal Plan* tab, select the template that you want to configure.
3. Specify general settings, and edit or add categories and fields as needed.
4. Save your changes.
5. To make more advanced changes, export and configure the XML file of the goal plan template.

Exporting a Goal Plan Template [page 61]
You can export a goal plan template to reuse it or to update it.

Adding Goal Wizard [page 62]
The optional `add-wizard` element provides a SMART goal wizard function in the goal plan. You can use the function to add new goals.

Adding Link Fields [page 64]
Link fields allow you to set up a goal plan field to point to a URL. Link fields don't display on the performance form, but can be displayed in the goal plan.

Defining Category and Default-Category [page 65]
Use the `category` and `default-category` elements to determine sections of a goal plan to which the goals are allocated.

Enabling Automatic Goal Numbering [page 67]
Use the `obj-plan-numbering` element to automatically number goals in the goal plan.

Configuring Objective Weight Rules and Objective Count Rules [page 68]
Configure objective weight rules and count rules at various levels using attributes in the XML of the goal plan template.

Configuring Custom Checkbox [page 71]
Configure the custom checkbox field using the type attribute `bool` in the XML to display a checkbox for the *Add Goal* and *Edit Goal* dialog boxes.

Configuring the Visibility Field [page 72]
Configure the *Visibility* field on the Goal Plan page to display a goal as private or public.

Enabling Goal Feedback [page 74]
Configure the `comments` field to allow users to edit or delete their own comments.

Defining Column Width in Goal Plan [page 75]
Use the `<plan-layout>` section to define the column width of the tables in Goal Plan.

Defining Goal Plan Field Layout in a Performance Management Form [page 77]
Use the `<form-layout>` element to determine which goal plan fields appear and how they're arranged on the *Goal Details* tab of a Performance Management v12 Acceleration form.

Removing the Add Personal Goal Option [page 79]
If you don't want employees to create personal goals, you can remove the *Personal Goal* option from your goal plan template.

Configuring Fields as Editable for Group Goals and Team Goals [page 80]
Use the `cascade-update` attribute to configure fields as editable for members of group goals and team goals.

Showing Achievements Linked to Goals [page 81]

Configure a goal plan template to show the achievements that users add in Continuous Performance Management in goal plans. It enables employees and managers to view achievements and feedback received on the achievements, directly in goal plans.

## 4.4.1 Exporting a Goal Plan Template

You can export a goal plan template to reuse it or to update it.

### Context

Although Provisioning offers the capability of exporting goal plan templates, we recommend that you maintain a source copy of your template in a file. By doing so, you can:

- Preserve any comments that you may have added to date and track updates that you make to the template (for example, a change log)
- Preserve comments in the template that help distinguish one section from another

> ℹ Note
>
> Comments are stripped from the goal plan template when you import the template and hence any templates that you export don't include your comments.

### Procedure

1. Log in to Provisioning.

   > → Remember
   >
   > As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

2. Select your target company.
3. Under the *Managing Plan Template* section, select *Import/Update/Export Objective Plan Template*.
4. Choose the icon in the *Export* column to export the goal plan template that you want.

## 4.4.2 Adding Goal Wizard

The optional `add-wizard` element provides a SMART goal wizard function in the goal plan. You can use the function to add new goals.

### Prerequisites

- You have defined the following fields in the goal plan template: `name`, `metric`, `start`, and `due`. Set only these four fields as required (`required="true"`). Set `metric` and `name` to the `text` type.
  This function works better if you have only a `name` field instead of `name` plus `description`. Any additional required fields might cause an error message on the last page of the wizard.
- Goal creators must include the *E* role and must have the read or write permission to these four fields.

### Context

The definition for the `add-wizard` element in the DTD file is as follows:

```
<!ELEMENT add-wizard (include-goal-align?)>
<!ATTLIST  add-wizard
mode CDATA #REQUIRED>
```

Subelement of add-wizard

| Subelement | Description |
|---|---|
| `Include-goal-align` | Allows users to align the goal to be added with one of their manager's goals or group goals during the *Relevant* step. |

### Procedure

- To add a goal wizard with the goal alignment, configure the element in the XML of the goal plan template as follows:

  ```
  <add-wizard mode="smart goal">
  <include-goal-align/>
  </add-wizard>
  ```

- To add a goal wizard without the goal alignment, configure the element in the goal plan template XML as follows:

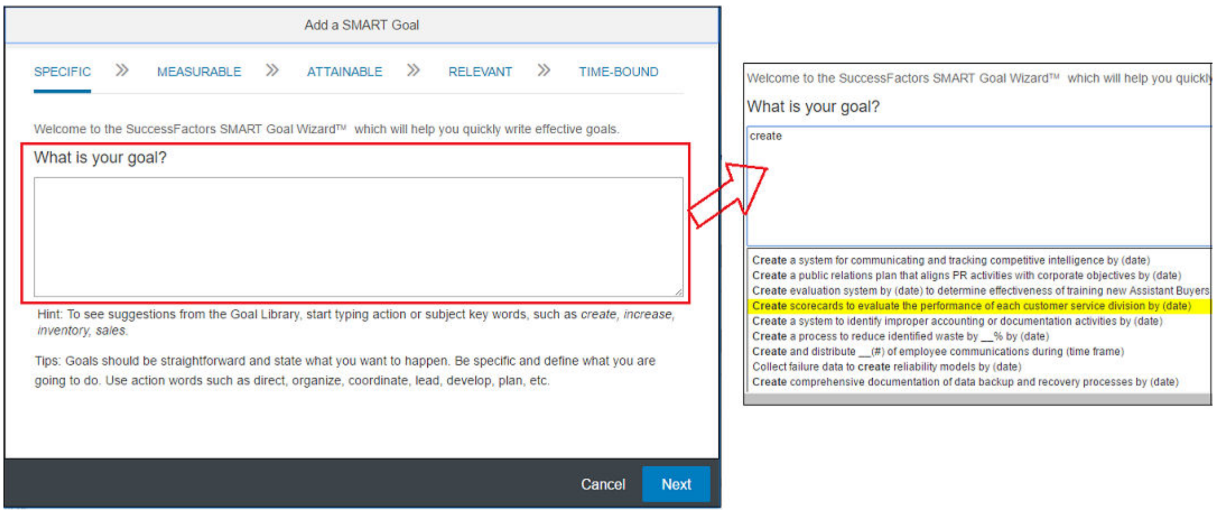
  ```
  <add-wizard mode="smart goal"/>
  ```

- To add a goal wizard with the Text Replacement and Goal Library defined, configure the element in the goal plan template XML as follows:

  ```
  </obj-plan-numbering>
  ```

```
<add-wizard mode="smart goal"/>
<text-replacement for="Instructions">
    <text><![CDATA Use this worksheet to add or update goals. To quickly add a
new goal, click the Add goal button, or browse the Hierarchy section to find an
existing goal to add to your plan.]></text>
</text-replacement>
<obj-library name="SuccessFactors Library">
</obj-library>
<category id="Customer">
```

Then, you can see the goal wizard on the UI as follows:




> **i Note**
>
> To see suggestions from the Goal Library, you need to keep *Disable autocompletion find in the UI* deselected in Provisioning and enable Goal Library in the goal plan.
>
> > **→ Remember**
> >
> > As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

## Related Information


Goal Plan Template Elements and Attributes [page 18]

Mapping of Goal Library Content to Goal Plans [page 98]

## 4.4.3 Adding Link Fields

Link fields allow you to set up a goal plan field to point to a URL. Link fields don't display on the performance form, but can be displayed in the goal plan.

### Procedure

#### Configuring Goal Plan Templates

1. Go to *Admin Center* > *Manage Templates*.
2. On the *Goal Plan* tab, select the template that you want to configure.
3. Select *Edit Fields*, and then choose *Add a New Field*.
4. Select *Custom Field*, specify the field ID and label, and select *link* as the field type.
5. Save your changes.

   Or you can add link fields through the template XML by adding the following sample code:

   Sample Code

```
<field-definition id="link" type="link" required="false" detail="false"
viewdefault="on" showlabel="false" field-show-coaching-advisor="false">
    <field-label>Link Data</field-label>
    <field-label lang="es_ES">Actual</field-label>
</field-definition>
```

#### Cofiguring the Goal Plan Page

6. Go to the *Goal Plan* page, choose *Display Options*, select the link field that you specified, and choose *Update*.
7. Go to *Action* > *Edit goal*, specify the link label and URL.
8. Save your changes.

### Results

You can see the link column in the goal plan. Choosing the link label that you specified opens a browser to display the URL.

## 4.4.4 Defining Category and Default-Category

Use the `category` and `default-category` elements to determine sections of a goal plan to which the goals are allocated.

### Context

The `category` element defines a top-level category used to segment a goal plan.

The `default-category` element defines the `default` or `catch-all` category. Any goal not matching one of the explicitly defined categories is placed in this category.

In a goal plan template, defining at least one `category` element is considered a best practice. It allows customers to use more of the tiles from the SuccessStore because some tiles require a category to function.

- If no `category` element is defined, the goal plan isn't divided into sections.
- If one or more `category` elements are present in the template, the goal plans based on the template are divided in sections according to the categories defined. The order of these sections in the goal plan is based on the order of the `category` elements.

If you want to have a category pull-down element in the goal plan and don't want to divide the plan into sections, define a field with the name **`category`**.

> **Note**
>
> Don't include the `category` elements and a field called **`category`** in the same goal plan template.

Subelements or Attributes of category and default-category

| Subelements or Attributes | Description |
|---|---|
| `id` | Defines the internal name that is used to store and identify the category. This name can't be localized.<br>**Note**<br>The & character is **not** supported in the attribute. To display this character in the category label of the goal plan, use the ampersand wrapped in a pair of quotation marks, that is, `"&"`. |
| `category-name` | Defines the localized name of a category. |
| `lang` | Defines the locale of the localized name for `category-name`. This attribute is optional. |

## Procedure

1. For each `category` element, define at least one `category-name` element.
2. Define one `category-name` element without a locale to define the default localized name.
3. If you want to define the locale of the localized name, add the `lang` attribute with a value to `category-name`.

   Example

   ```
   <category id="Performance Milestones:Financial">
       <category-name>Financial</category-name>
       <category-name lang="fr_FR_SF">Financier</category-name>
   </category>
   ```

4. Place the `default-category` element after the last regular `category` element in the XML of the goal plan template.

   Example

   ```
   <category id="Customer">
       <category-name>Customer</category-name>
   </category>
   <category id="Financial">
       <category-name>Financial</category-name>
   </category>
   <category id="Learning and Development">
       <category-name>Learning & Development</category-name>
   </category>
   <category id="Internal Business Operations">
       <category-name>Internal Business Operations</category-name>
   </category>
   <default-category id="Other">
       <category-name>Other</category-name>
   </default-category>
   ```

5. To assign permissions to the category, add the `control-category-element` attribute with permissions to the XML.

   If `control-category-element` is not configured, the category field will still be visible when users create, edit, copy, cascade, or assign goals.

   If `control-category-element` is configured, you need to configure permissions to control who can see the category dropdown.

   Example

   **The `control-category-element` Attribute with Read and Write Permissions**

   ```
   <field-definition id="control-category-element" type="text" required="true"
   detail="false" viewdefault="on" showlabel="false" field-show-coaching-
   advisor="false" cascade-update="push-down">
       <field-label lang="en_US">control-category-element</field-label>
       <field-description>control-category-element</field-description>
   </field-definition>
   ```

   ```
   <field-permission type="read">
       <description><![CDATA[Everyone can read the category]]></description>
       <role-name><![CDATA[*]]></role-name>
       <field refid="control-category-element"/>
   ```

```
</field-permission>
<field-permission type="write">
    <description><![CDATA[HR can write to the category]]></description>
    <role-name><![CDATA[EH]]></role-name>
    <field refid="control-category-element"/>
</field-permission>
```

## 4.4.5 Enabling Automatic Goal Numbering

Use the `obj-plan-numbering` element to automatically number goals in the goal plan.

### Context

If goal categories are defined, the first number segment always reflects the ordinal position of the goal category.

> **Note**
>
> If you sort goals, for example, by Goal Name, in the goal plan, the *Move goal up* and *Move goal down* functions don't take effect. To resolve this issue, you can reset the sorting criteria by adding the `obj-plan-numbering` element.

### Procedure

1. Include at least one line of `obj-plan-number-format` inside the `obj-plan-numbering` element.

   > **Example**
   >
   > - **One Line of obj-plan-number-format**
   >   This example automatically numbers goals in the format 1.1, 1.2, 1.3, and so on (assuming you have one goal category).
   >
   >   ```
   >   <obj-plan-numbering>
   >         <obj-plan-number-format>#.</obj-plan-number-format>
   >   </obj-plan-numbering>
   >   ```
   > - **Two Lines of obj-plan-number-format**
   >   This example automatically numbers goals in the format 1.1, 2.1, 2.2, and so on. In this example, users can't indent goals.
   >
   >   ```
   >   <obj-plan-numbering>
   >         <obj-plan-number-format>#.</obj-plan-number-format>
   >         <obj-plan-number-format>#.</obj-plan-number-format>
   >   </obj-plan-numbering>
   >   ```

2. To enable users to indent goals to one or more levels, include at least three lines of `obj-plan-number-format`.

**Example**

This example automatically numbers goals in the plan as follows and allows a maximum indent level of one, for example, 1.1.1.

1.1

1.1.1

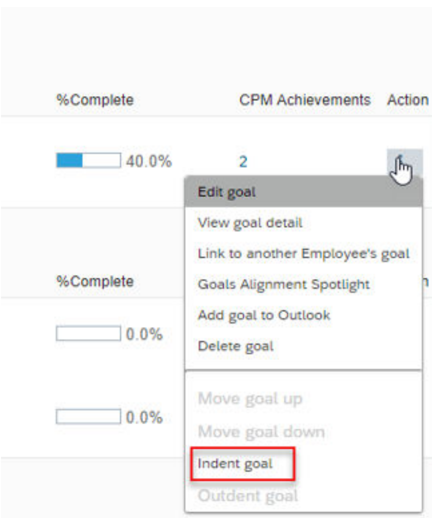
1.2

1.2.1

...

```
<obj-plan-numbering>
      <obj-plan-number-format>#.</obj-plan-number-format>
      <obj-plan-number-format>#.</obj-plan-number-format>
      <obj-plan-number-format>#.</obj-plan-number-format>
</obj-plan-numbering>
```

Users can indent goals through *Action* > *Indent goal* on the *Goal Plan* page.




## 4.4.6 Configuring Objective Weight Rules and Objective Count Rules

Configure objective weight rules and count rules at various levels using attributes in the XML of the goal plan template.

### Prerequisites

- The goal plan minimum or maximum weight or count has a dependency on goal plan pagination. That is, `pager-max-objs-per-page` must be greater than 0. Otherwise, the minimum or maximum doesn't appear.

- For category-level weights or counts, categories must be defined as elements. For example, `<category id="Financial">`.

## Context

For objective weight rules, you can configure the following:

- Minimum or maximum for the sum of all goal weights in a goal plan
- Minimum or maximum for the sum of all goal weights in a category
- Minimum or maximum supported weight value for an individual goal

For objective count rules, you can configure minimum or maximum at both the goal plan level and the category level.

When you add attributes for objective weight rules and objective count rules, it's important to ensure that the elements are in the correct order. The following XML example shows the attributes in the order that they can be included.

> Example
>
> ```
> <obj-plan-template spellchk="true" new-obj-share-status-public="true"
> instructions-viewdefault="on" alerts-viewdefault="on" cascade-parent-
> viewdefault="off" cascade-child-viewdefault="off" pager-max-objs-per-page="4"
> pager-max-page-links="9" pager-max-children-per-parent="0" display-alignment-
> format="goals" more-details-child-format="goal-plan" share-confirm="false"
> unshare-confirm="false" allow-group-goal="false" goal-tree-link="true"
> expand-collapse-categories="false" use-text-for-privacy="true" cws-people-
> role="true" max-goals="10" min-goals="5" max-weight="100.0" min-
> weight="40.0" max-weight-per-obj="20.0" min-weight-per-obj="10.0" overwrite-
> target-population="false" swap-goal-link="false" learning-activity-deep-
> link="false" show-total-goalscore="false" show-goal-id="false">
> ```

> → Tip
>
> - You don't have to configure both a minimum and a maximum. If no maximum is required, don't include the attribute in the XML of the goal plan template.
> - Plan-level weights or counts are independent of category-level weights or counts. You can configure a category with a higher maximum or a lower minimum than the goal plan maximum or minimum.
> - Decimals are supported for objective weights. For example, you can set maximum to 100.5%. Make sure that your weight field definition also supports decimals in the `field-format`.
> - The validation provides “soft” warnings instead of strictly enforced errors that prevent users from exceeding the limits configured.

## Procedure

- **Configure a Minimum or Maximum Weight**
- (For a goal plan) Configure the attributes `min-weight` and `max-weight` inside the `<obj-plan-template>` element.

**Example**

In this example, for the goal plan, goals have a total minimum weight of 1% and a total maximum weight of 100%.

```
<obj-plan-template min-weight="1 max-weight="100">
</obj-plan-template>
```

- (For a category) Configure the attributes `min-weight` and `max-weight` inside the `<category>` element.

  Each category can have a different minimum or maximum value.

**Example**

In this example, for the Financial category, goals have a total minimum weight of 25% and a total maximum weight of 50%.

```
<category id="Financial" min-weight="25" max-weight="50">
<category-name>Financial</category-name>
</category>
```

- (For an individual goal) Configure the attributes `min-weight-per-obj` and `max-weight-per-obj` inside the `<obj-plan-template>` element.

**Example**

In this example, each goal has a weight between 5% and 50%.

```
<obj-plan-template min-weight-per-obj="5" max-weight-per-obj="50">
</obj-plan-template>
```

- **Configure a Minimum or Maximum Count**
- (For a goal plan) Configure the attributes `min-goals` and `max-goals` inside the `<obj-plan-template>` element.

**Example**

In this example, the goal plan has a maximum of 15 goals.

```
<obj-plan-template max-goals="15">
</obj-plan-template>
```

- (For a category) Configure the attributes `min-goals` and `max-goals` inside the `<category>` element.

  Each category can have a different minimum or maximum value.

**Example**

In this example, the Financial category requires a maximum of five goals in it.

```
<category id="Financial" max-goals="5">
<category-name>Financial</category-name>
</category>
```

## 4.4.7 Configuring Custom Checkbox

Configure the custom checkbox field using the type attribute `bool` in the XML to display a checkbox for the *Add Goal* and *Edit Goal* dialog boxes.

### Procedure

1. Export the goal plan template and open it with an XML editor.
2. Add the type attribute `bool` to the XML.

   Sample Code

   ```
   <field-definition id="checkbox" type="bool" required="true" detail="false"
   viewdefault="on" showlabel="true" field-show-coaching-advisor="false" cascade-
   update="push-down" reportable="field10">
   <field-label>Custom Checkbox</field-label>
   <field-description>Checkbox for Manager</field-description>
   </field-definition>
   ```
3. Save your changes and upload the XML in Provisioning.

### Results

You can see a custom checkbox when you add or edit the goal plan.

### Related Information

Exporting a Goal Plan Template [page 61]
Importing a Goal Plan Template [page 58]

## 4.4.8 Configuring the Visibility Field

Configure the *Visibility* field on the Goal Plan page to display a goal as private or public.

### Context

Usually, a public goal is visible to the manager and to the other roles that have permissions to view the goal. A private goal by contrast, is only accessible to the employee. However, you can configure a goal plan to make the private goal accessible to other roles (including, but not limited to, the manager or manager's manager).

Using the `use-text-for-privacy`, `new-obj-share-status-public`, `share-confirm`, and `unshare-confirm` attributes, you can define whether the goals are public or private, and manage the appearance of the *Visibility* field.

> **i Note**
>
> By default, the values of the *Visibility* field are *public* and *private*. However, if you want to customize the UI labels of the *Visibility* field values to something like *Open* and *Confidential*, use the *Manage Languages* tool. The message keys for the *public* and *private* labels are **opublic** and **oprivate**. Refer to Language Management Tool for more information.

### Procedure

1. Configure the `use-text-for-privacy`, `new-obj-share-status-public`, `share-confirm`, and `unshare-confirm` attributes as follows to suit your business needs.

| | Configure the attributes as follows... | | | | |
|---|---|---|---|---|---|
| **If you want to...** | `use-text-for-privacy` | `new-obj-share-status-public` | `share-confirm` | `unshare-confirm` | **Include permissions for `share` and `private-access` in the goal plan?** |
| Hide the *Visibility* field | `false` | `false` (or delete the attribute from the template) | N/A | N/A | No |
| Configure the *Visibility* field to be available on the Goal Plan page and be editable | `true` | `true` | `true` | `true` | Yes |

| If you want to... | Configure the attributes as follows... use-text-for-privacy | new-obj-share-status-public | share-confirm | unshare-confirm | Include permissions for `share` and `private-access` in the goal plan? |
|---|---|---|---|---|---|
| Configure the *Visibility* field to appear as an icon on the Goal Plan page and be editable | `false` | `true` | `true` | `true` | Yes |
| Configure the *Visibility* field to be available on the Goal Plan page but as a read-only field | `true` | `true` | N/A | N/A | No |
| Configure the *Visibility* field to be available on the Goal Plan page and be editable, and set the goals to be private by default | `true` | `false` | `true` | `true` | Yes |

2. To enable users to edit the *Visibility* field, grant user roles the permissions by configuring the permissions section of the goal plan template to include `share` and `private-access` permissions.

> Sample Code
>
> In this example, employees (E role) and their managers (EM role) are granted edit permissions for the *Visibility* fields.

```
<permission for="share">
    <description><![CDATA[Employees and managers can share and unshare goals
in their own plan.]]></description>
    <role-name><![CDATA[E]]></role-name>
    <role-name><![CDATA[EM]]></role-name>
</permission>
<permission for="private-access">
    <description><![CDATA[Employees and their managers up the hierarchy can
view unshared or private goals. Parents of cascaded private goals can see the
children.]]></description>
    <role-name><![CDATA[E]]></role-name>
    <role-name><![CDATA[EM]]></role-name>
</permission>
```

## Related Information

Goal Plan Template Elements and Attributes [page 18]

# 4.4.9 Enabling Goal Feedback

Configure the `comments` field to allow users to edit or delete their own comments.

## Context

Users can collapse or expand the comments section and edit or delete their own comments.

> **Note**
> - In the legacy Goal Management, there's a 4,000-character limit for the `comments` field. In the latest Goal Management, the upper limit is 1000 characters.
> - There's no limit on the number of comments that can be added to a particular goal.

> **→ Remember**
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

## Procedure

1. Configure the `comments` field in the goal plan template as follows:

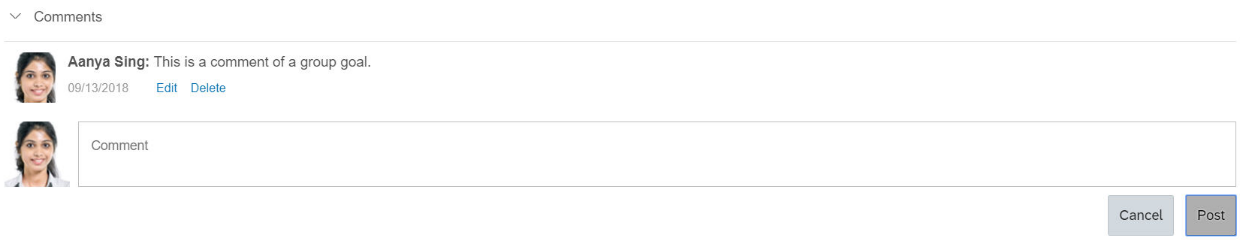
   ```
   <field-definition id="comments" type="comment" required="false" detail="false"
   viewdefault="on" showlabel="false">
   <field-label>comments</field-label>
   <field-description>Public Comments</field-description>
   </field-definition>
   ```

2. Add `<field refid="comments"/>` under `<field-permission type="write">` in the goal plan template to ensure the write permission.
3. (Applicable only to legacy goal plans) Add the following code between goal plan dates and instruction sections in the goal plan template to enable the `threaded-feedback` switch:

   ```
   <switches><switch for="threaded-feedback" value="on"/></switches>
   ```

## Results

You've enabled the goal feedback and users can see the following on the UI:




> ℹ Note
> - The `comments` field is invisible in the goal when the goal is opened in edit mode.
> - Comments can be managed in Performance Management forms and 360 Review forms.

# 4.4.10 Defining Column Width in Goal Plan

Use the `<plan-layout>` section to define the column width of the tables in Goal Plan.

## Context

The `<plan-layout>` section determines how the goal fields appear on the goal plan. When you define this section, keep the following guidelines in mind:

- Any field that you want to show in the goal plan needs to be included in the `<plan-layout>` section; otherwise it doesn't appear in the goal plan.
- Think of the fields as a series of columns. Align them from left to right, starting with the widest column to the left (usually the goal name and tables).
- The XML is generated from top to bottom, with top correlating to your left-most field, and going down as you move to fields on the right.
- Allocate sufficient weight for fields. If not, the characters in the fields may miss pixels. Don't position a subcategory field in the first column of the goal plan layout.

The optional `weight` attribute defines relative weights for the layout of the column. The sum of all the column weights equals 100.

- If this attribute is specified, it's converted to a percent when rendering the HTML column and then allows the column to stretch and shrink with the browser.
- If this attribute isn't specified, the field only takes up as much space as it requires.

> → Recommendation
>
> We recommend that you define at least one column with a nonzero weight.

As a best practice, you can configure column widths as follows:

- Column 1: 60
- Column 2: 30
- Column 3: 10

## Procedure

1. Locate the `<plan-layout>` element in the XML of the goal plan template.
2. Configure the `<column weight>` attribute inside the `<plan-layout>` element.

Example

In the following example, the goal name column takes up 50% of the entire table, apportioning the remaining fields at 10% each.

```
<plan-layout>
    <column weight="50.0">
      <field refid="name"/>
      <field refid="description"/>
    </column>
    <column weight="10.0">
      <field refid="weight"/>
    </column>
    <column weight="10.0">
      <field refid="start"/>
    </column>
    <column weight="10.0">
      <field refid="due"/>
    </column>
    <column weight="10.0">
      <field refid="state"/>
    </column>
    <column weight="10.0">
      <field refid="metric"/>
    </column>
</plan-layout>
```

# 4.4.11 Defining Goal Plan Field Layout in a Performance Management Form

Use the `<form-layout>` element to determine which goal plan fields appear and how they're arranged on the *Goal Details* tab of a Performance Management v12 Acceleration form.

## Context

The order that you enter the fields in the `<form-layout>` element of the goal plan template determines how they appear on the *Goal Details* tab.

> **Note**
>
> Of the tabs available in the Performance Management form, the *Goal Details* tab is the only one that is configurable. The *Other Details* tab, which includes the sub goal tables, is not.

## Procedure

1. Locate the `<form-layout>` element in the goal plan template.
2. Configure the `<form-layout>` element to include the goal plan fields in the order that you want.

   **Example**

```
<form-layout>
    <![CDATA[#set ($group = "")
<table width="100%" cellspacing="0" cellpadding="0">
  <tr>
    <td valign="top" width="50%">#if ($display.name) <b>${label.name}:</b><br>
    ${field.name} #end</td><td> </td><td> </td>
    <td valign="top" width="10%">#if ($display.state) <b>${label.state}:</
b><br>
    ${field.state} #end</td>
    <td> </td><td valign="top" width="10%">#if ($display.comments) <b>$
{label.comments}:</b><br>
    ${field.comments} #end</td>
    <td> </td><td valign="top" width="20%">#if ($display.weight) <b>$
{label.weight}:</b><br>
    ${field.weight} #end</td>

  </tr>
</table>
<table width="100%" cellspacing="0" cellpadding="0">
    <tr><td valign="top">
        <div style="display:none" id="${util.newHiddenDivId()}">
        #if ($display.metric) <b>${label.metric}:</b><br>
        ${field.metric} #end
        </div>
             </td>
    </tr>
    <tr><td valign="top">
        <div style="display:none" id="${util.newHiddenDivId()}">
        #if ($display.link) <b>${label.link}:</b><br>
```

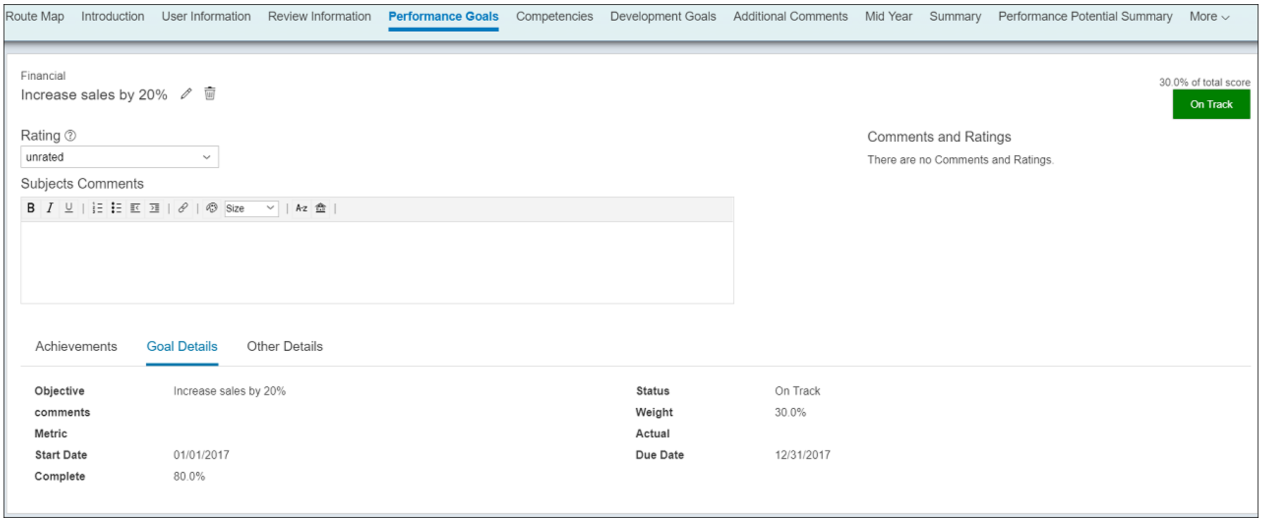
```
        ${field.link} #end
        </div>
       </td>
       <td> </td>
       <td valign="top">
        <div style="display:none" id="${util.newHiddenDivId()}">
        #if ($display.actual) <b>${label.actual}:</b><br>
        ${field.actual} #end
        </div>
      </td>
      <td valign="top">
          <div style="display:none" id="${util.newHiddenDivId()}"><b>$
{label.category}:</b><br>
        ${field.category}
               </div>
      </td>
    </tr>
    <tr><td valign="top">#if ($display.start)
      <div style="display:none" id="${util.newHiddenDivId()}"><b>$
{label.start}:</b><br>
        ${field.start} #end
      </div>
      </td>
      <td> </td>
      <td valign="top">#if ($display.due)
          <div style="display:none" id="${util.newHiddenDivId()}"><b>$
{label.due}:</b><br>
        ${field.due} #end
        </div>
      </td>
      <td>#if ($display.done)
      <div class="objPair" style="display:none" id="$
{util.newHiddenDivId()}"><b>${label.done}:</b>${field.done}<br>
      </div>#end
      #if ($display.group-rating)
      <div class="objPair"
style="display:none" id="${util.newHiddenDivId()}"><b>${label.group-
rating}:</b>${field.group-rating}<br>
      </div>#end
      </td>
    </tr>
</table>
    <div class="clear">
       
    </div>#if ($display.targets)
    <div style="display:none" id="${util.newHiddenDivId()}"><b>$
{label.targets}</b><br>
      ${field.targets}
    </div>#end]]>
</form-layout>
```

**i Note**

If you use the goal feedback, you can still add the `comment` field to the `<form-layout>` element, and the threaded feedback on a goal appears on the Performance Management form.

## Results

You can see how the goal plan fields are displayed on the *Goal Details* tab of a Performance Management v12 Acceleration form:




## 4.4.12 Removing the Add Personal Goal Option

If you don't want employees to create personal goals, you can remove the *Personal Goal* option from your goal plan template.

### Procedure

1. Export your target goal plan template and open it with an XML editor.
2. Add the following code snippet to the XML file.

   Sample Code

   ```
   <switches>
   <switch for="turnoff-add-personal-goal-button" value="on"/>
   </switches>
   ```
3. Save your changes.
4. Import the updated goal plan template and set it as the default template.

### Results

The *Personal Goal* option is removed from the *Creating a New Goal* dialog box.

## Related Information

[Exporting a Goal Plan Template [page 61]]
[Importing a Goal Plan Template [page 58]]

# 4.4.13 Configuring Fields as Editable for Group Goals and Team Goals

Use the `cascade-update` attribute to configure fields as editable for members of group goals and team goals.

## Context

Two of the use cases for this scenario are as follows:

- A department can share the same goal with shared results but each person can have a different set of tasks or milestones for that goal. For example, Customer Success has a goal for 95% customer satisfaction. Although the result is shared by everyone in the department, what each person does to contribute to that goal is different and can be tracked individually.
- A business unit goal is again shared by everyone but the impact of this goal on a person's goal plan is different based on that person's level in the business unit. For example, a shared goal has a bigger impact on directors than on associates, so it's necessary to configure the `weight` field as editable.

## Procedure

1. Locate the field that you want to configure in the goal plan template.
2. Add the `cascade-update` attribute with the following values in this field.

| Value | Description |
|---|---|
| push-down (Default) | If a field is set to push-down, this field is editable by group goal or team goal owners and read only to group goal members or team goal assignees regardless of field permissions. The updates made to the source group or team goal are pushed down and reflected in the assigned goals accordingly.<br><br>→ Remember<br><br>To support auto-population of the calculated fields in group goals, set the cascade-update attribute to push-down. |
| regular | When a field is set to regular, this field is editable by assigners when they assign the goal.<br><br>When a field is set to regular and you grant the field permission write to group goal members or team goal assignees, this field is editable by them. |

Example

In this example, the weight field is editable by everyone who has the write permission in a group goal.

```
<field-definition id="weight" type="percent" required="true" detail="true"
viewdefault="on" showlabel="true" field-show-coaching-advisor="false" cascade-
update="regular">
  <field-label>Weight</field-label>
  <field-description>Weight</field-description>
  <default-value>0.0</default-value>
  <field-format>#.#</field-format>
</field-definition>
```

## 4.4.14 Showing Achievements Linked to Goals

Configure a goal plan template to show the achievements that users add in Continuous Performance Management in goal plans. It enables employees and managers to view achievements and feedback received on the achievements, directly in goal plans.

### Prerequisites

- Continuous Performance Management is enabled.
- The product edition is either Enterprise or SPRAC.

## Context

> **Note**
>
> This is an SAP SuccessFactors Business Beyond Bias feature. Use it to support processes that detect, prevent, or eliminate the influence of bias, helping you achieve your diversity and inclusion goals.

## Procedure

1. In Admin Center, go to *Manage Templates*.
2. On the *Goal Plan* tab, select the template that you want to configure.
3. Choose *General Settings* and select *Display Continuous PM Achievements on goal plan*.
4. Save the template.

## Results

If users have achievements linked to goals, the achievements are shown on users' goal plans.

# 5 Preparing Goals

Now that you've all set with your goal plan template, you may want to learn about goal import and goal libraries to prepare goals.

Goal Import [page 83]
Goal import is one method available to create, edit, or delete goals, using a flat file instead of the UI, and is available to users in *Admin Center*.

Goal Library [page 96]
A goal library is a list of goals that the user can select and add to their goal plan or the goal plans of their direct reports.

## 5.1 Goal Import

Goal import is one method available to create, edit, or delete goals, using a flat file instead of the UI, and is available to users in *Admin Center*.

### Latest Goal Management

In the latest Goal Management, you can only use the following goal import function for development goals: *Import Performance Goals*. Features supported in this function are limited to the supported features of the latest Goal Management.

### Legacy Goal Management

In the legacy Goal Management, you can use the following two goal import functions for development goals:

- *Beta Goal Import*: Provides the newest features.
- *Import Goals* (older function): Continues to be available because it provides other features that aren't supported in the new import.

Features supported in *Beta Goal Import* include:

- Import of the metric lookup table
- Comments import
- Support the SAP SuccessFactors Job Scheduler application used by SAP SuccessFactors Professional Services and Customer Service to schedule automated goal imports.
- Goal alignment management
- Update of goals created through the UI

- Import of a new Mission Statement
- Addition and update of Group Goals
- Set goals as read only through the import
- Enable goal plan permission association for customers with standard permissions
- Assign group goal permissions for employees in target populations

> **Note**
>
> *Beta Goal Import* does not support the import of goals for **inactive** users.

Features supported in *Import Goals* include:

- Defining goal plan visibility for users
- Ability to set goals as read-only through import

### Related Information

Overview of the Latest Goal Management [page 184]

## 5.1.1 Goal Import Scenarios

This section describes some of the main goal import scenarios.

### Create Goal Through UI, Update Goal Through Import

This is supported by updating the goal using the goal's internal ID.

1. Find the goal's internal ID through Goal Search classic report, Ad Hoc Goal Management Report, or Goal ID if displayed directly in goal plan.
2. Download the import template CSV header.
3. Enter a row to update the goal putting the internal goal ID in the ID column.
4. Upload the import file.

### Create Goal Through Import, Update Goal Through Import

There are two options in this scenario. You can either update the goal by internal goal ID as in the previous scenario, or you can update the goal by GUID.

## Create Goal Through UI, and Sub-Goal Through Import

To add subgoal tables, for example, tasks, you will need the goal's internal ID. When defining the subgoal rows, reference the internal goal ID of the goal, the subgoal rows should be added to.

**OBJ_PLAN_ID**: 51

**OBJ_PLAN_NAME**: 2008 Goal Plan with everything

**DATE**: Thu Nov 06 17:25:41 PST 2008

MAX_ERROR

| ^TYPE | ACTION | ID | GUID | SUBGUID | FILTER_USER-NAME |
|---|---|---|---|---|---|
| METRICLOOKUP | ADD | 3365 | | MLT-001 | cgrant |
| METRICLOOKUP | ADD | 3365 | | MLT-002 | cgrant |
| METRICLOOKUP | ADD | 3365 | | MLT-003 | cgrant |
| METRICLOOKUP | ADD | 3365 | | MLT-004 | cgrant |
| METRICLOOKUP | ADD | 3365 | | MLT-005 | cgrant |

## Create Sub-Goal Table Through Import, Update Sub-Goal Table Through Import

The update CSV file will be exactly the same as the create CSV file except the ACTION will be set to UPDATE. Subgoal table rows are currently only updated using their SUBGUID.

## Create Sub-Goal Table Through UI, Update Sub-Goal Table Through Import

Currently not supported.

## Creating Goals that Use Numeric and Text Achievements in the Metric Lookup Table

This scenario here has a goal plan configured to support both numeric and text target achievement columns in the metric lookup table (achievement & achievement-text). When this happens, the CSV template will include an additional column "OBJECTIVE_NUMERIC_METRIC_LOOKUP_TABLE". This column specifies for the goal which achievement should be used in the metric lookup table (numeric/achievement or text/achievement-text). Supported values are Y/N, 1/0. A "Y" or "1" represents that the goal will use the achievement/numeric.

## 5.1.2 Goal Import Examples

This section provides goal import examples.

### Import Goal and Metric Lookup Table

**OBJ_PLAN_ID**: 51

**OBJ_PLAN_NAME**: 2008 Goal Plan with everything

**DATE**: Thu Nov 06 17:25:41 PST 2008

**MAX_ERROR**

| ^TYPE | ACTION | ID | GUID | SUBGUID | FILTER_USER-NAME |
|---|---|---|---|---|---|
| OBJECTIVE | ADD | | GA-006 | | ALL |
| METRICLOOKUP | ADD | | GA-006 | MLT-0012 | ALL |
| METRICLOOKUP | ADD | | GA-006 | MLT-002 | ALL |
| METRICLOOKUP | ADD | | GA-006 | MLT-003 | ALL |
| METRICLOOKUP | ADD | | GA-006 | MLT-004 | ALL |
| METRICLOOKUP | ADD | | GA-006 | MLT-005 | ALL |

The OBJECTIVE row (row 6) will contain values for the goal and the METRICLOOKUP rows will only contain entries in the METRICLOOKUP_ columns.

| METRICLOOKUP_achievement | METRICLOOKUP_rating |
|---|---|
| 10 | 1 |
| 20 | 2 |
| 30 | 3 |
| 40 | 4 |
| 50 | 5 |

### Import by Custom Filters

Custom filters must first be defined in the data model under <custom-filters>.

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| OBJ_PLAN_ID | 51 | | | | | | | |
| OBJ_PLAN_NAME | 2008 Goal Plan with everything | | | | | | | |
| DATE | Thu Nov 06 17:25:41 PST 2008 | | | | | | | |
| MAX_ERROR | | | | | | | | |
| ^TYPE | ACTION | ID | GUID | SUBGUID | FILTER_USER | FILTER_MGR_ID | FILTER_CUSTOM01 | FILTER_CUSTOM02 |
| OBJECTIVE | ADD | | GA-001 | | | | Western | 2nd shift |

## Import Goal Comments

Goal comments are entered on their own row with the type of "OBJCOMMENT". Similar to the behavior of goal comments through the UI, goal comments cannot be updated or deleted through import. Goal comments can only be added.

**OBJ_PLAN_ID**: 27

**OBJ_PLAN_NAME**: GM SuccessStore 2017 modified

**DATE**: Fri Sep 14 05:54:41 EDT 2018

**MAX_ERROR**

| ^TYPE | ACTION | ID | GUID | SUBGUID | FILTER_USER-NAME |
|---|---|---|---|---|---|
| OBJECTIVE | ADD | | C124 | | admin |
| OBJCOMMENT | ADD | | C124 | SubimpC124 | admin |

The goal comment (OBJCOMMENT) row will only have an entry in the OBJCOMMENT_comments column.

## Update Goal Created from UI

Updating a goal created through the goal plan UI can be done, but you have to get the internal goal ID to do that.

**OBJ_PLAN_ID**: 9

**OBJ_PLAN_NAME**: 1 Test Goal Plan

**DATE**: Mon Mar 02 11:04:13 MST 2009

**MAX_ERROR**

| ^TYPE | ACTION | ID | GUID | SUBGUID | FILTER_USER-NAME |
|---|---|---|---|---|---|
| OBJECTIVE | UPDATE | 3365 | | | cgrant |

## Align Goals through Import

A goal can be aligned up to another goal by using the OBJECTIVE_PARENTID column. This column accepts the internal goal ID of the goal to be aligned up to (the goal in the CSV file is the child goal, the goal defined in the OBJECTIVE_PARENTID column is the parent goal). The internal goal ID is available from Reports > Classic Reporting > Goal Search. The column is Goal Id in that report.

## 5.1.3 Turning On Goal Import

You can enable the goal import function in Admin Center.

### Prerequisites

You have the *Import Goals* permission.

### Procedure

1. Go to *Admin Center* > *Goal Management* > *Goal Management Feature Settings*.
2. Select *Goal Import* from the feature list.
3. Choose *Save*.
4. Go back to *Admin Center* > *Goal Management*.

   For the latest Goal Management, you can see the *Import Performance Goals* option.

   For the legacy Goal Management, you can see the *Beta Goal Import* option.

   > **Note**
   >
   > For the legacy Goal Management, you can see the *Import Goals* option in *Goal Management* even if you don't select the *Goal Import* feature. But the *Import Goals* option is a legacy feature with limited functions. We recommended that you enable the *Goal Import* feature and use the more powerful *Beta Goal Import*.

## 5.1.4 Goal Import File Specifications

Walk you through basic information and major concepts of the goal import file.

CSV File Format [page 89]
The goal import file is a CSV text file.

Goal Import Limitations [page 92]

Understanding Goal ID, GUID, & SUBGUID [page 93]
The ID, GUID and SUBGUID all specifically identify goals.

Import File Processing [page 94]
The import file is processed top down one action line at a time.

### 5.1.4.1 CSV File Format

The goal import file is a CSV text file.

The CSV text file is comma-delimited, with string values enclosed in double quotes. The file can have any name but should have a .csv extension. The rows must be tailored to the particular goal plan template for the implementation. This enables accurate insertion of data into all field elements.

An import file can contain any combination of 3 possible types of rows: template associations, objectives, or table fields (tasks, targets, or milestones, also known in some implementations as subgoals). You may find it simpler to manage objectives and subgoals in separate import files, but they can be combined into one import file if desired.

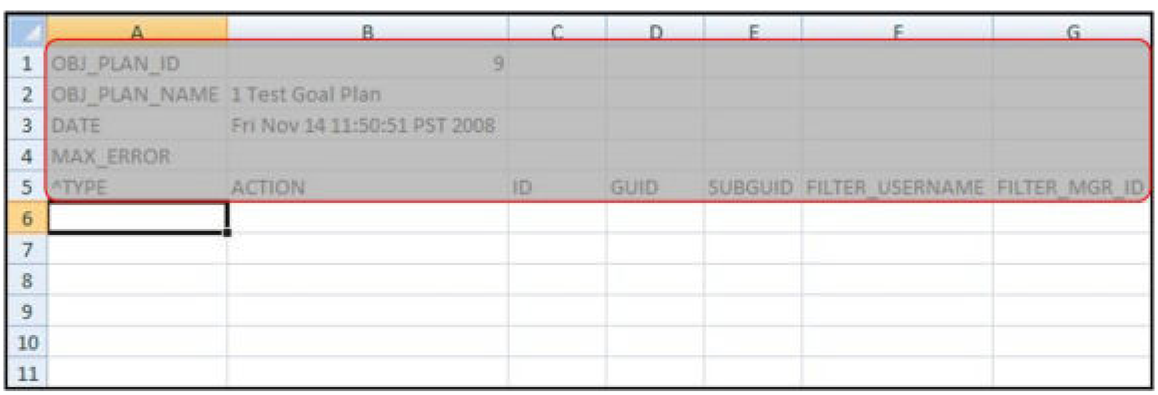
The order of the rows within the file does not matter, except that if you are importing new tasks, targets, or milestones, those should come after the associated parent goal rows.

Header rows should not be included; due to the flexible nature of the import structure, different lines within an import file can have different fields. Each row is identified with a type flag in the first column. Import rows are associated with users or groups of users with the following owner ID keys: USER_ID, USER_NAME, DEPT_NAME, DIVISION_NAME, JOB_CODE, LOCATION_NAME, CUSTOM01, CUSTOM02, and CUSTOM03. (In some cases, LOCALE is also supported.) For example, it is possible to create the same goal for all users in a given department with a one-row import file.

If the source data is in Microsoft Excel, save the file as a CSV (comma-delimited) file, and watch out for these common problems:

- String values that might have commas in them need to be explicitly quoted (for example, "do this, do that").
- If you've used values for a key field (such as User ID and Department) that are character values that look like numbers ("000123"), the cells in Excel need to be formatted as text so that Excel doesn't convert them to true numbers (123).

When the goal plan CSV template is opened, it contains information similar to the following screenshot. The first 5 rows of the template represent the information and header column for this CSV file. These 5 rows should not be modified. This includes the columns defined in the 5th row.




The header column row defines what types of values should be placed in the rows beneath them. The following table describes the header types.

| Column | Description | Example |
|---|---|---|
| ^TYPE | Identifies the item that the ACTION will be taken on. Valid options are: OBJECTIVE, TASK, MILESTONE, TARGET, METRICLOOKUP, OBJCOMMENT. Values are case sensitive. | OBJECTIVE_GROUPV2 and OBJECTIVE_TEAM |
| ACTION | The action to take on the item identified in TYPE. Valid options are: ADD, UPDATE, DELETE, ASSIGN, SHARE, UNSHARE, UNASSIGN. Values are case sensitive.<br><br>SHARE is used to add co-owners in Team Goals, and ASSIGN is used to assign the Team Goals to the Goal Plan of someone in the team. | ADD |
| ID | This is the goal's internal ID and can only be created by the SAP SuccessFactors system. This field will be used only to identify a specific goal to be acted upon. The import creator should only add a value here if they want to modify a specific goal. The goal export feature automatically retrieves each goal's ID when a goal is exported. | 12345 |
| GUID | Required. This is a unique code that the import creator added to the import file to update or delete goals at a later date and time. The code will group one or more goals into one action. Example, an import file is used to push a goal to all employees in both the engineering and sales department. At a later date and time, all these goals can be updated by one import file line by specifying an action and the GUID. | Imp123 |
| SUBGUID | This is a unique code used to uniquely identify a row in a table field (TASK, MILESTONE, TARGET, METRICLOOKUP, OBJCOMMENT_comments). The SUBGUID is used in the same way for table field rows as the GUID field is used for goals. | Subimp123 |
| FILTER_USERNAME | This field is filtered against the employee USERNAME field. This field can accept multiple user names, separated by semicolons. Keyword "ALL" to be used to select all users. Used to determine which users to create the goal for. | msmith; cgrant |
| FILTER_MGR_ID | This field is filtered against the employee MANAGER ID field. Used to determine which users to create the goal for. | mhoff |

| Column | Description | Example |
|---|---|---|
| FILTER_DEPT | This field is filtered against the employee DEPARTMENT field. Used to determine which users to create the goal for. | sales |
| FILTER_DIV | This field is filtered against the employee DIVISION field. Used to determine which users to create the goal for. | EMEA |
| FILTER_JOBCODE | This field is filtered against the employee JOB CODE field. Used to determine which users to create the goal for. | MGR |
| FILTER_LOC | This field is filtered against the employee LOCATION field. Used to determine which users to create the goal for. | Paris |
| FILTER_CUSTxx | This field is filtered against the employee CUSTOMXX field. NOTE: only a max of three custom fields can be used to filter goal actions. Custom fields must be defined in the data model under <custom-filters>. Used to determine which users to create the goal for. | Any text here |

Goal data columns always start with the string "OBJECTIVE_" followed by the field name that the goal will act on. Columns for goal tables (i.e. Tasks, Targets, Milestones, Metric Lookup) will start with their respective table name (TARGET_, TASK_, MILESTONE_, METRICLOOKUP_). In general, what follows will be the same as the field definition id as defined in the goal plan. For example, to update the "metric" field in the goal plan you would put a value into the "OBJECTIVE_metric" column of the import file.

Example of some, but clearly not all, goal fields that can be used in the goal import include:

**i Note**

- If `default-value` is configured for a field in the goal plan template and you don't set this field in the CSV file, `default-value` is applied only to the "ADD" action for goals after goal import.
- Currently in the CSV file, only English-idiomatic writing rules are supported. For example, in the case that you need to use decimal points, make sure you use commas, instead of any other characters.

| Column | Description | Example |
|---|---|---|
| OBJECTIVE_CATEGORY | Category ID as defined in the goal plan XML | Financial |
| OBJECTIVE_PARENTID | Used to manage goal alignment. This is the internal goal ID for the goal to be aligned up to. | 3364 |
| OBJECTIVE_PUBLIC | Define if the goal will be public or private. Accepted values are (Y / N) or (1 / 0) | Y |
| OBJECTIVE_name | Maps to field-definition id="name". | Increase Services Revenue per Account |
| OBJECTIVE_metric | Maps to field-definition id="metric" | Service Revenue per Account |
| OBJECTIVE_actual | Maps to field-definition id="actual" | |

| Column | Description | Example |
|---|---|---|
| OBJECTIVE_weight | Maps to field-definition id="weight" | |
| OBJECTIVE_start | Maps to field-definition id="start" | 3/1/2014 |
| OBJECTIVE_due | Maps to field-definition id="due" | 12/31/2014 |
| OBJECTIVE_status | Maps to field-definition id="state". Accepts the enum value. | |
| OBJCOMMENT_comments | Maps to field-definition id=" comments". Goal comments are added as a separate row in the CSV file with a ^TYPE of OBJCOMMENT. | |
| OBJECTIVE_actual-achievement | Maps to field-definition id=" actual-achievement". This field is used to calculated the goal's rating based on the metric lookup table. Value is numeric. | 500 |
| TARGET_date | Date column for the Target sub-goal table. Sub-goal tables require a separate row in the CSV file. | |
| TARGET_target | Target column of the Target sub-goal table. | |
| TARGET_actual | Actual column of the Target sub-goal table. | |
| OBJECTIVE_NUMERIC_METRIC_LOOKUP_TABLE | This column appears when a goal plan is configured with both achievement and achievement-text. Accepted values are Y / N or 1 / 0. A positive value (Y, 1) represents the goal uses the achievement column and field. | Y |
| OBJECTIVE_link | Represents the URL field supported in a goal plan. Row value format is: [[URL][Label]] | [[http://www.example.com][Click here]] |

## 5.1.4.2 Goal Import Limitations

CSV File Limitations

- The file size limit for beta goal import is 30,000 lines.

  > **Note**
  >
  > If the import file contains more than 30,000 goals or users, the import doesn't go through.

- Microsoft Excel 2007 has a character limit of 255 per cell, so if you open a file in Excel, ensure text based fields don't get cut off.
- The required format for all due date fields is mm/dd/yyyy.
- If you receive a parsing error, check to see if the date format is yyyy-mm-dd (confirm by opening the file in notepad).

- If you open the file in Microsoft Excel, Microsoft Excel may translate dates into mm/dd/yyyy.

Feature Facts and Limitations

This is a list of answers to frequently asked questions. Many of the issues below are current feature limitations that will be addressed in future product releases.

- A goal can be updated using either the new or old import feature, as long as you have the GUID for that goal.
- Goals created through the UI can be updated through the import feature.
- The new goal import can be scheduled through the SAP SuccessFactors Job Scheduler application.
- The total number of goals being imported for all users should be limited within 30,000 goals for add, update, delete, or assign action. It means you can have one goal in the CSV file being imported for 30,000 users, or two goals in the CSV file being imported for 15,000 users, or overall 30,000 goals in the CSV file for different users.
- The recommended maximum number of entries to add, update, delete, assign is 30,000. This could be 30,000 goals with no sub-goals, or 3,000 goals - each with 10 sub-goal entries (tasks, targets, milestones, metric lookup).
- The user name filter is the only filter which supports multiple entries in a single row (separated by semi-colons). All other filter columns only support a single entry per row.
- When updating a goal, only the fields to be updated need to be included in the goal. Leaving values blank will not remove the data from the goal. To remove the data, place \NULL as the entry for the column.
- Custom fields to be used as filters must be defined in the data model under <custom-filters>.
- One goal should not be defined twice in the same CSV upload file. This means don't put one row in to add a goal and then another row to update that same goal.
- The calculated goal rating (generated through the metric lookup table) cannot be added/updated through the import. To change or set the calculated rating, set values for the actual achievement and metric lookup table.
- To ensure goals are listed in the order they appeared in the CSV import file when the goals are by default sorted by "Objective Name", you may reset the sorting criteria from "by Objective Name" to "by Display Order". As of now, the only way to do so is to add the numbering feature, and click the "#" in the header to sort goals according to their number. The number of each goal is generated according to the display order, so they're always in the same order.
  The numbering feature automatically generates a number for each goal, so you do not have to set it through goal import.

  > **Note**
  >
  > It is important that an import file has less than 1000 goals to ensure correct ordering of goals. An import file containing greater than 1000 goals may not follow the intended order, as the system will create a separate background job when importing the CSV to optimize performance.

## 5.1.4.3 Understanding Goal ID, GUID, & SUBGUID

The ID, GUID and SUBGUID all specifically identify goals.

- The ID uniquely identifies a goal within the goal management system. ID is an optional field that is used when the import file needs to update an objective or subobjective that does not have a GUID. The ID can be found in the Goal Search report and Ad Hoc Goal Management reports as Goal ID. It is also possible to display the ID directly in the Goal Plan. Columns that support the goal id are `ID` and `OBJECTIVE_PARENTID`.

- The GUID and SUBGUID are unique identifiers associated to a goal in a previous goal import. A GUID may be related to one or more goals. The GUID field is mandatory for all ADD actions. The GUID cannot be changed for a goal once created. SUBGUID uniquely identifies sub goal table entries for a goal.

The filter options (FILTER_) narrow down the goals to receive the action. If no filters are specified, then the goal import will act on goals based only on the ID, GUID and SUBGUID ids. The behavior of the filter fields depends on the action being performed.

> **i Note**
>
> The GUID in ad hoc report (Report-Table) is used for goals through Beta Goal Import, rather than from Goal Library.

- For add actions - The filter fields determine what goals will receive the goal. Each goal that receives the new goal will be assigned the GUID for the goal. If an employee already has a goal in their goal plan with the SAME GUID, then that employee will NOT receive a second copy of the goal and a warning message will be displayed saying how many employees did not receive a goal. This behavior will allow a company to rerun an import, for example monthly, to make sure that employees who are captured by the filter receive the goal.

  > **i Note**
  >
  > It is up to the import creator to keep goals with the same GUID in sync or run the risk of having different versions of the same goal.

- For update and delete actions - All goals that match the given GUID, SUBGUID and filter fields are updated. This means that if a GUID or SUBGUID are not given for an action, no update or delete will occur.

Some examples of how the actions are applied based on the ID, GUID, SUBGUID and FILTER fields.

### Example

1. An add action has a GUID but no filters - All employees receive the goal.
2. An add action has a GUID and a filter - All employees that match the filter receive the goal. If an employee who should receive the goal already has an existing goal with the same GUID, then that employee will not receive the goal. This implies that the goal may be added to some employees who did not previously have the goal and would not be added to other employees (who already have the goal).
3. An update action has identified a GUID but no filters - All goals with the GUID will be updated.
4. An update action has identified a GUID and a filter for department - All the goals that match the GUID which are in a specific department are updated.

## 5.1.4.4 Import File Processing

The import file is processed top down one action line at a time.

Processing Behavior

As each line is processed, an action is performed (either **ADD**, **UPDATE** or **DELETE**). As each line is processed a check will be performed. If the action is invalid, a warning message is displayed identifying the problem import row and the reason for the failure. If an action is valid, then the add, update or delete action will be performed. Each action has different behavior.

- **Add** - The add action will add a new object which will be an objective or a table field row (where a table field is either a task, milestone, target, metric-lookup). The action will select one or more employees to receive the new object based on the specified filter fields. Each employee selected by the filter field will then receive the object. The data to be added for the object is based on the data located in each action column plus the GUID and SUBGUID.
  Example, an action line will add a goal to an employee. The import file header section has four headings, name, start date, due date and status. Each value in the action line that lines up under each heading section shall be used to create the goal.

  > **Note**
  >
  > Any add action can potentially add more than one objective or table field row per line. Additionally, an employee will not receive the new goal or table field row if they already have an existing objective or table field row with the GUID or SUBGUID for the object being added.

- **Update** - All goals that match the given GUID, SUBGUID and filter fields are updated. This means that if a GUID or SUBGUID are not given for an action, no update action will occur. If a field has a value of "\NULL", any data in a field will be removed and the field will remain empty.
  Using \NULL will wipe out data, but an error will be reported if the field is required; if the field is required, data will not be removed, as required fields cannot be left empty. Leaving a cell value blank (empty - not to be confused with \NULL) leaves data unchanged and will not overwrite with blank values.

  > **Note**
  >
  > Employees through the UI will be able to update a goal. This means that an update done through goal import may overwrite a value that was previously updated by an employee.

- **Delete** - All goals that match the given GUID, SUBGUID and filter fields are deleted. This means that if a GUID or SUBGUID are not given for an action, no update action will occur.

Error Handling

As the action line is processed, one or more errors may be returned. When an action line is processed, it will return the number of objects successfully acted on and the number of lines that could not be acted on and the reason why they could not be processed. The user that initiated the import will receive an email with the summary and status of the import.

If errors are encountered, file processing continues. In other words, if an error is encountered on line 1 of a 100 line file, lines 2 through 99 will still be processed.

Therefore if errors are reported, the user should fix and re-import only those lines that generated errors and not the entire file.

Errors that can be reported include, but are not limited to:

- Invalid field Id _____
- User not found with id: _____
- Invalid date (expected MM/DD/YYYY) value for field id _____
- Invalid category
- Unable to create objective _____

The results indicate the line number with each error to help troubleshoot the problems.

### 5.1.5 Mapping Templates to Users

The following applies to implementations with standard permissions. Implementations that include Role Based Permissions (RBP) should manage goal plan permission through *Admin Tools* > *Manage Roles*. In most implementations, all users can see all active goal plan templates. However, in some implementations, users may be limited to only seeing some of the active goal plan templates. If your implementation limits templates to certain users, this import row type establishes the associations between selected users and goal plan templates. (If your implementation does not limit templates to certain users, you can ignore this row type, do not use it when importing goals.)

The format for this row type is as follows:

| Column | Description | Example |
|---|---|---|
| System Field | Static value indicating the import row type. For template associations, should always be "TEMPLATE". | TEMPLATE |
| Owner ID Key | Any one of the available owner ID types: USER_ID, USER_NAME, DEPT_NAME, DIVISION_NAME, JOB_CODE, LOCATION_NAME, CUSTOM01, CUSTOM02, or CUSTOM03. Note: USERID can be used in place of USER_ID. | USER_ID |
| Owner ID | Value The value corresponding to the key types specified in column 2. | user1234 |
| Plan ID | The goal plan template ID to associate with the user(s) described in the owner ID key/value pair. Typically a number: 1, 2, 3, etc. | 1 |
| Action | ADD (to establish the template association for the user(s)) or REMOVE (to remove the association). | ADD |

## 5.2 Goal Library

A goal library is a list of goals that the user can select and add to their goal plan or the goal plans of their direct reports.

Goal Library supports the following features:

- A UI in *Admin Center* to allow an administrator to manage the goal library entries
- Support of the import and export of goal libraries for managing them
- Support the ability to select multiple goals from the library at once to be included into a goal plan

> **i Note**
>
> There can be several goal libraries within one instance. But a goal plan can only be linked to one unique goal library at one time.

## 5.2.1 Goal Library File

You can enhance the goal library to support defaults for all goal and subgoal fields.

You can include any fields that the customer requires, multiple language, and multiple libraries in the same import file.

Here are the standard goal plan template fields that are supported:

- name
- desc
- start
- due
- done
- metric
- target-baseline
- category
- weight
- state
- comments
- goto-url
- bizx-actual
- bizx-target
- bizx-pos
- bizx-strategic

The table column fields include:

- Tasks (desc, start, due, date, done, completed, target, actual): Single and multiple tasks
- Milestones (desc, start, due, date, done, completed, target, actual): Single and multiple milestones
- Targets (date, target, actual): Single and multiple targets
- Metric Lookup (achievement, achievement-text, rating, description)

> **i Note**
>
> The fields that the goal library supports are not limited to these standard fields.

## 5.2.2 Importing a Goal Library

You can add one or more goal libraries to your instance in *Admin Center*.

### Prerequisites

You have the *Import/Export Goals library* permission.

## Procedure

1. Go to *Admin Center* > *Goal Management* > *Import/Export Goals Library*.

   Goal libraries are stored in csv files. If it is your first time to import a goal library, download a template csv file to add goals to.
2. Choose a template from the *Available List of Templates* dropdown.

   The *Default Header* option generates a csv file with only the headers.
3. Click *Download* to download the goal library template.
4. Added necessary goal library information to the CSV file.

   > **Note**
   >
   > When you delete a goal library, make sure you apply DELETE actions to all leaf nodes in addition to the root node.
5. In the *Import Objective Library by uploading a CSV file.* section, click *Import*.

   The *Import Objective Library by uploading a CSV file.* popup window appears.
6. Click *Choose File*, and select the prepared csv file.

   The size of the csv file must not exceed 5 MB.
7. Click *Upload*.

## Results

You have successfully imported a goal library to the system.

### 5.2.3 Mapping of Goal Library Content to Goal Plans

The `obj-library` element defines a goal library which can be used to create individuals goals.

The mapping, ID is optional, the name needs to point to the appropriate library name. The SAP SuccessFactors Library is automatically loaded and included with TGM. You must have the English goal library when using a goal library in other languages.

> **Note**
>
> - The `field-mapping` attribute is no longer supported in both legacy and the latest Goal Management.
> - Only custom goal libraries are supported in the latest Goal Management.

## Requirements

This is used for both objective library and learning catalog.

- For Objective library mapping, id is optional, the name needs to point to the appropriate library name.
- For learning catalog, use id to point to the appropriate learning catalog, Goals may be imported into a goal plan using a comma separated file.
- _Goal library field size limits: Goal library name, category, and goal name have a field size limit of 1024. Goal category and goal name are represented in the "ENTRY_NAME" column of the goal library csv file format._DTD Definition

```
<\!ELEMENT obj-library>
<\!ATTLIST obj-library
name CDATA #REQUIRED
id CDATA #IMPLIED>
```

## Example

Standard SAP SuccessFactors Library

```
…
</text-replacement>
<obj-library name="SuccessFactors Library">
</obj-library>
<category id="Customer">
…
```

## Example

Custom Goal Library

```
…
</text-replacement>
<obj-library name="My Goal Library" id="100">
</obj-library>
<category id="Customer">
…
```

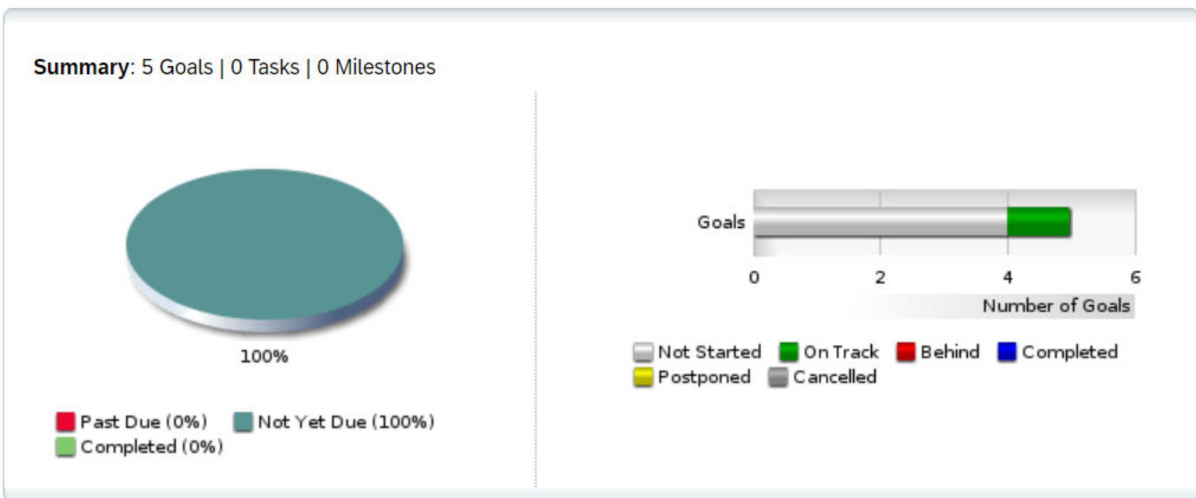
# 6 Working with Goals

Now, you're ready to work with goals through various Goal Management features.

## 6.1 My Goals View

*My Goals* view allows you to filter your goal list to view the goals that are most important to you.

You can take a look at the two status charts to get a fast visual summary. The goal summary feature adds another section to the goals page called **Summary**.




### Configuration Information

To enable the goal filtering option, include the following XML in your TGM template: `<summary-section filter="true"/>`

## 6.2 Group Goals

This section provides you with detailed information on the behavior, and configuration of the group goals feature.

### Definitions

In an effort to clearly communicate the features of group goals here are some terms with definition that will be used:

- **Group Goal Owner** - This is the user that has the original group goal. The employee where the group goal is created. There is always only one group goal owner per goal.
- **Group Goal Member** - These are the users that have been assigned the group goal.
- **Group Goal Creator** - Person creating a group goal (i.e. setting the field values of the group goal).
- **Group Goal Assigner** - Person assigning the group goal to group goal members.

### Key Benefits

The list of key benefits is based on functionality that is not available in the first version of group goals but is supported in v2.0

- Ability to have sub-goal tables (for example tasks, targets, milestones, metric lookup) for a group goal.
- Support for calculated goal ratings using the metric lookup table.
- Ability to configure, per field, which are editable and which are read-only in a group goal (this also applies to sub-goal tables).
- Ability to assign group goals to employees in separate target populations during mass import.
- Notifications about the employees who could not be assigned to the group goals, as they were not part of the target population.
- Ability to import Group Goals 2.0 (via Beta Goal Import) for Add/Update/Delete actions (it is same as Personal Goal, with the only difference that TYPE = OBJECTIVE_GROUPV2).

### Potential Drawbacks

The list of potential drawbacks is based on functionality that is either available in the older version of group goals, or just not available at all.

- Support for dynamic group goal membership - In v2.0 it's a static list of group goal members and not dynamic based on criteria.
- Cannot cascade group goals - Also not supported in v1.
- No group rating - this is supported in group goals v1. If needed in group goals v2, must use Metric Lookup Table

### Comparing the Different Versions of Group Goals

| Feature | Group Goal v1 | Group Goal v2 |
|---|---|---|
| Changes to fields by the owner can be pushed down to members | Yes | Yes |
| Dynamic group goal membership | Yes | No |
| Group goal membership can be modified after initial setup | No | Yes |
| Supports tasks/targets/milestones | No | Yes |
| Supports calculated rating | No | Yes |
| Supports group rating | Yes | No |
| Fields can be made editable by group goal members | No | Yes |

1. Enabling Group Goals [page 102]
   The two different versions of group goals are mutually exclusive. You can only use either old, or new group goals but not both. This applies at the company instance level.
2. Creating a Group Goal [page 104]
   If the group goal feature is enabled in your instance, and you have the *New Add Group Goal Creation* permission, you can create a group goal in the goal plan page.
3. Assigning a Group Goal [page 105]
   If the group goal feature is enabled in your instance, and you have proper permission, you can assign group goals to other users.

## 6.2.1 Enabling Group Goals

The two different versions of group goals are mutually exclusive. You can only use either old, or new group goals but not both. This applies at the company instance level.

### Provisioning

Set the `allow-group-goal` attribute to "true" in the *Goal Plan Template* XML under *Managing Plan Template* in *Provisioning*.

To enable group goals v2 turn it on under *Provisioning* > *Edit Company Settings* > *Company Settings* > *Goal Frameworks* > *Enable Group Goals 2.0 - requires "Total Goal Management"*

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

## Admin

Once the provisioning switch is enabled for Group Goals 2.0, you will see a new set of permissions in the application.

**In a non-RBP instance**

Go to *Admin* > *Manage Security* > *Administrative Privileges* > *Manage Goals*, and select the following two permissions:

- *New Group Goal Creation* - Grant users this permission to allow them to create group goals 2.0 in their goal plans
- *Group Goal Assignment* - This permission allows a user to assign a group goal to users. The group goal does not have to be on the assigners goal plan (i.e. they can navigate to someone's goal plan that is the group goal owner and they can assign that group goal).


**In an RBP enabled instance**

Grant the following permissions:

- *New Add Group Goal Creation*: Grant users this permission to allow them to create group goals 2.0 in their goal plans
- *New Add Group Goal Deletion*: Grant users this permission to allow them to delete group goals 2.0 from their goal plans
- *Add Group Goal Assignment*: This permission allows a user to assign a group goal to users. The group goal does not have to be on the assigners goal plan (i.e. they can navigate to someone's goal plan that is the group goal owner and they can assign that group goal).

**In the XML** - you must allow group goals. By default it is false, you need to make it true: `allow-group-goal="true"`.

**Parent topic:** Group Goals [page 101]

**Next task:** Creating a Group Goal [page 104]

## 6.2.2 Creating a Group Goal

If the group goal feature is enabled in your instance, and you have the *New Add Group Goal Creation* permission, you can create a group goal in the goal plan page.

### Prerequisites

- Group goal feature is enabled in the instance.
- You have the *New Add Group Goal Creation* permission.

### Procedure

1. Go to *Goals* page.
2. Select a goal plan.
3. Click *+ Add Goal* in the header.

   You can see a dropdown of three ways to add goals.
4. Choose *Create a New Goal*.

   You can see three options to create a goal: *Personal Goal*, *Library Goal*, and *Group Goal*.
5. Select *Group Goal*.

   The *Create a Group Goal* pop-up window displays.
6. Fill in information for your group goal. For example, category, goal name, start date, and due date.
7. Click *Save Changes*.

### Results

You have successfully added a group goal to your goal plan.

### Next Steps

You can further assign the newly created group goal to your group members.

**Task overview:** Group Goals [page 101]

**Previous:** Enabling Group Goals [page 102]

**Next task:** Assigning a Group Goal [page 105]

## 6.2.3 Assigning a Group Goal

If the group goal feature is enabled in your instance, and you have proper permission, you can assign group goals to other users.

### Prerequisites

- The group goal feature is enabled in your instance.
- You have the *Add Group Goal Assignment* permission.

### Procedure

1. Go to *Goals* page.
2. Select a goal plan.
3. Choose one or more group goals.
4. Click *Actions* in the header.

   You can see *Assign* in the dropdown. Please note if you do not have group goals in your goal plan, the *Assign* button does not show.
5. Click *Assign*.

   A *Assign Goal* popup window shows.
6. Select the recipients you want to assign the group goal and click *Next*.
7. You can double check or edit the group goal before assigning it to the selected recipients.
8. Click *Assign*.

### Results

You have successfully assigned the group goals to the selected recipients.

**Task overview:** Group Goals [page 101]

**Previous task:** Creating a Group Goal [page 104]

## 6.3 Team Goals

Team Goals is a feature that allows managers to create, update and assign goals for their team members, without having to include the goals in their own Goal Plan. It effectively allows the manager to simply manage and monitor the goals they set for their team, without having to achieve the goals directly.

> **i Note**
>
> 'Goal' can also appear as 'Objective', depending on your 'Company Settings' in 'Provisioning'. So, in the application, you may find 'Objective Plan' instead of 'Goal Plan', 'Launch Team Objective' instead of 'Launch Team Goal', 'Team Objective' instead of 'Team Goal', and so on.

> **i Note**
>
> This is an SAP SuccessFactors Business Beyond Bias feature. Use it to support processes that detect, prevent, or eliminate the influence of bias, helping you achieve your diversity and inclusion goals.

### Overview

'Team Goals' has been designed using the existing Group Goals 2.0 framework, and supports all the features of 'Group Goals 2.0'.

> **i Note**
>
> To use Team Goals, ensure that you set the `<allow-group-goal>` attribute to "true" in your Goal Plan template.

Major highlights of 'Team Goals' are:

- Includes all of the existing features of ‘Group Goal 2.0’ without forcing the manager to take accountability of achieving the goals (i.e., the goals will not appear on the creator’s Goal Plan).
- Supports the ability to share assignment distribution over the team goal – effectively allowing a manager to cascade the team goals to other managers, who may wish to assign the goals to their team

> **i Note**
>
> There are no separate XML tags for Team Goals, and it follows all the field level permissions configured for Group Goals. So, when you use Team Goals and Group Goals based on the same goal plan template, their field level permissions will be the same.

### Prerequisites

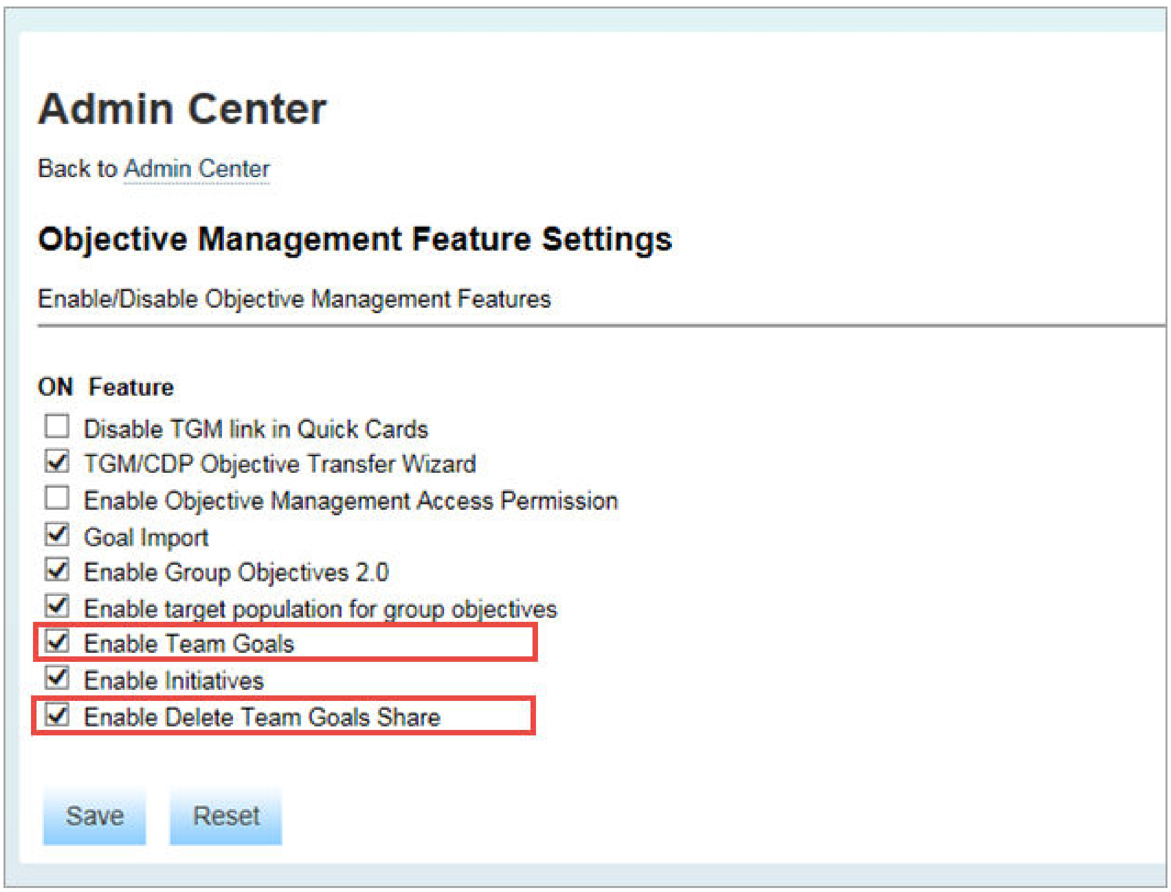
- UI Version: GM v12
- Product Editions: Enterprise and SPRAC

- Enable the option for Generic Objects in Provisioning

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

## Configuration

1. Go to *Admin Center*.
2. To enable Team Goals in the application, in the *Tools Search* field, search for *Goal Management Feature Settings* and select the following options:
   - *Enable Team Goals* – Enables the Team Goal feature in the application, and provides permissions to grant appropriate access.
   - *Enable Delete Team Goals Share* – Enables you to share Team Goals with other users, and grant them the right to delete the Team Goals as well. This permission allows the primary owner and the co-owners of Team Goals to delete the goals.




3. Click *Save*.
4. Next, to use Team Goals, you must enable the following permissions:
   - *Manage Team Goals* – grants permission to create, edit, and delete Team Goals
   - *Assign Team Goals* – grants permission to assign the Team Goals to members of your team

- *Share Team Goals* – grants permission to share the Team Goals with other users, such that they too have administrative control over the shared Team Goals.

> **i Note**
>
> The "Share Team Goals" permission is not bound by target population to facilitate co-ownership of Team Goals between multiple managers and matrix managers.

5. Click *Done* and on the 'Permission Role Detail' page, click *Save Changes*.

You have successfully configured Team Goals in the application.

## Answers to Some Key Questions on Team Goals

- **What is the difference between owner and co-owner of a Team Goal, and how do you recognize the difference?**
  At first, the creator of the Team Goal is its only owner. The owner then shares the Team Goal with other users and they become the co-owners. A co-owner has administrative privileges over the Team Goal, and can read, update, and delete (if the shared owner has permissions to delete) the Team Goals. If the owner of the Team Goal gives up access to the Team Goal, then one of the co-owners becomes the new owner. Currently, there is no indicator to distinguish owner from co-owner. The UI only displays the user that created the Team Goal. To view the owner and/or the co-owner(s) of a Team Goal, click the corresponding *Actions* link and select *Share*.
- **Can I import/mass upload team goals?**
  Yes. While importing Team Goal, you need to indicate the Type=OBJECTIVE_TEAM. When the team goal is imported, the 'created by' for the Team Goal (i.e., the Team Goal owner) will be the login user. The following import 'ACTIONS' are supported: 'ADD', 'UPDATE', 'DELETE', 'ASSIGN', 'SHARE', 'UNSHARE', and 'UNASSIGN'.

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | OBJ_PLAN_ID | 215 | | | | | | | | | | |
| 2 | OBJ_PLAN_NAME | 2015 Objectives | | | | | | | | | | |
| 3 | DATE | Mon Nov 09 13:42:37 CST 2015 | | | | | | | | | | |
| 4 | MAX_ERROR | | | | | | | | | | | |
| 5 | ^TYPE | ACTION | ID | SUBID | GUID | SUBGUID | FILTER_US | FILTER_M( | FILTER_CU | FILTER_CU | FILTER_CU | FILTER_CU |
| 6 | OBJECTIVE_TEAM | ADD | | | import1 | | cgrant1 | | | | | |
| 7 | OBJECTIVE_TEAM | UPDATE | 4556 | | import2 | | admin | | | | | |
| 8 | OBJECTIVE_TEAM | ASSIGN | 4556 | | assign | | SFADMIN | | | | | |
| 9 | OBJECTIVE_TEAM | ASSIGN | 4556 | | assign | | wsown | | | | | |
| 10 | OBJECTIVE_TEAM | DELETE | 4556 | | delete1 | | admin | | | | | |
| 11 | OBJECTIVE_TEAM | SHARE | 4556 | | share1 | | admin | | | | | |
| 12 | | | | | | | | | | | | |

- If an Admin creates the Team Goals using the *Import Goals* tool, can the Managers perform 'ADD', 'UPDATE', 'DELETE', 'ASSIGN', 'SHARE', 'UNSHARE', and 'UNASSIGN' on such Team Goals?
  Yes. When the Admin imports the Team Goals, the Admin becomes the owner of the Team Goals. The Admin can share the Team Goals with the Managers to make them the co-owners of the Team Goals. Once they become the co-owners of the Team Goals, the Managers can perform the 'ADD', 'UPDATE', 'DELETE', 'ASSIGN', 'SHARE', 'UNSHARE', and 'UNASSIGN' actions on the Team Goals.
- **Is Team Goal stored as a type of goal that we can report on, like Group vs Personal? What reporting schema will be available for Team Goal?**
  Yes. You can pull a report with only team goals. Team goals are maintained like any other goals.
- **Will Team Goal replace Group Goals 1.0 or 2.0?**
  No. There are no plans to replace Group Goals 1.0 or 2.0 with Team Goal. The feature can be used either independent of Group Goals or in conjunction with Group Goals.

- **What happens when the owner of a Team Goal becomes inactive? Do the team members still see the Goal? Can the administrator add a co-owner, after the owner becomes inactive?**
  This is more likely a unique case, where the owner has not shared the Team Goal with anyone to co-own, and has become inactive. In such a case, the Team Goal will operate just like Group Goals 2.0 – where the employee (team) will be able to see the assigned goal. Also, the Team Goal is accessible only to its owner and co-owners. So, if the administrator does not own or co-own the Team Goal, the administrator cannot add a co-owner, and the Team Goal will not be editable, accessible, or assignable any longer.
- **When an Admin - the owner of a Team Goal, makes only one Manager the co-owner of that Team Goal, and gives up ownership, the Manager automatically becomes the new owner of that Team Goal. If that Manager becomes inactive, will the Admin be able to assume ownership of the Team Goal again?**
  No. Once people give up the ownership of the Team Goal, they have to request the new owner or the co-owners of the Team Goal to grant co-ownership of the Team Goal to them.
- **Is Team Goal applicable to the Development Goals? Or can you associate Learning activities to Team Goals?**
  No. Currently, Team Goal is supported only in Goal Management. Neither the Team Goal is applicable to Development Goals, nor can you associate Learning activities to it.
- **Will Team Goal have dynamic functionality like assigning to all direct reports, without manually adding and removing users?**
  No. On the Assign Team Goal page, your hierarchy (direct reports) appears, and you may select each assignee individually or all your direct reports at one time. However, currently there is no support for dynamic Team Goal membership.
- **If I'm neither the owner or a co-owner of a Team Goal, can I perform the Assign, Share and Edit actions on the Team Goal?**
  To work with Team Goals you can either use the application UI, wherein you click the *Launch Team Goal* option on the Goal Plan and land on the *Team Goal* page, or use the *Import Goals* tool. So, if you are neither the owner nor the co-owner of a Team Goal, the following table explains what you can possibly do or not do with the Team Goal:

| Can you...? | Using the application UI: *Team Goal* page | Using the *Import Goals* tool |
|---|---|---|
| Assign the Team Goal | **No**, because if you are neither the owner nor the co-owner of a Team Goal, you cannot view it on the *Team Goal* page. | **Yes**. Even if you aren't the owner or co-owner of a Team Goal, you can assign the Team Goal, if you have the *Assign Team Goals* permission enabled for your role, and you have people in your target population that you can assign the Team Goal to. |
| Share the Team Goal | **No**, because if you are neither the owner nor the co-owner of a Team Goal, you cannot view it on the *Team Goal* page. | **No**, because only owners and co-owners enjoy the sharing privileges for a Team Goal. |

| Can you...? | Using the application UI: *Team Goal* page | Using the *Import Goals* tool |
|---|---|---|
| Edit the Team Goal | **No**, because if you are neither the owner nor the co-owner of a Team Goal, you cannot view it on the *Team Goal* page. | **Yes**. Even if you aren't the owner or co-owner of a Team Goal, you can edit the Team Goal, if you have the *Manage Team Goals* permission enabled for your role. |

## 6.3.1 Creating a Team Goal

You can create a team goal for your team members, without assigning the goal to yourself.

### Prerequisites

- You have access to the goal plan.
- You have the *Manage Team Goal* permission.

### Procedure

1. Go to *Goals* > *Goal Plan*.
2. Select a goal plan that you want to add the team goal to from the goal plan dropdown.
3. Click the *Action* icon in the header.

   A dropdown of actions displays.
4. Select *Launch Team Goal*.

   The *Team Goal* page shows.
5. Click *Create Team Goal*.

   A *Create a Team Goal* popup appears.
6. Select the goal *Category*, enter the *Goal* description, provide the *Metric* to measure the goal, and fill out the other necessary details.
7. Click *Save Changes*.

### Results

You have successfully created a team goal.

## Next Steps

You can further edit, share, assign, or delete the team goal.

# 6.3.2 Sharing or Unsharing a Team Goal

You can share a team goal with other users or administrators. However, the users with whom you share the team goal must have the *Goal Plan Permission* and the *Manage Team Goal* permission to edit the shared goals effectively.

## Prerequisites

- You are the owner or co-owner of the team goal.
- You have the *Share Team Goals* permission.

## Procedure

1. Go to *Goals* > *Goal Plan*.
2. Select a goal plan from the goal plan dropdown.
3. Click the *Action* icon in the header.

   A dropdown of actions displays.
4. Select *Launch Team Goal*.

   The *Team Goal* page shows. You can see your team goal list.
5. Choose the team goal that you want to share with others and click the *Actions* icon.

   You can see a dropdown of actions.
6. Select *Share*.

   A *Share Team Goal* popup window appears.
7. Enter the *Employee* with whom you want to share the goals, and click the name of the employee from the dropdown.

   The employee is automatically added to the share list.

   > **Note**
   >
   > You can give up the ownership of a Team Goal you own or co-own, by unsharing it with yourself.

   > **Note**
   >
   > To share the right of deleting the Team Goal, ensure that the *Enable Delete Team Goals Share* option has been enabled on the *Goal Management Feature Settings* page.

8. Click *Done*.

## Results

The team goal has been successfully shared with the selected users. They are now the co-owners of the team goal. The co-owners of the Team Goal can assign, share, edit or even delete the team goal.

# 6.3.3 Assigning or Unassigning a Team Goal

If you are the owner or co-owner of a team goal, you can assign the team goal to others who have the *Goal Plan Permission*.

## Prerequisites

- You are the owner or co-owner of the team goal.
- You have the *Assign Team Goals* permission.

## Procedure

1. Go to *Goals* > *Goal Plan*.
2. Select a goal plan from the goal plan dropdown.
3. Click the *Actions* icon in the header.

   A dropdown of actions displays.
4. Select *Launch Team Goal*.

   The *Team Goal* page shows. You can see your team goal list.
5. Choose the team goal that you want to share with others and click the *Actions* icon.

   You can see a dropdown of actions.
6. Select *Assign*.

   An *Assign Goal* popup window appears.
7. You can choose your direct reports from the *Recipient Hierarchy* section, or search for other employees from the *Other Recipients* section.
8. Click *Next*.
9. You can further edit the team goal before clicking *Assign*.

### Results

You have successfully assigned the team goal to the recipients.

### Next Steps

To unassign the team goal, click the corresponding *Actions* link, and select *Unassign*. Clear the checkboxes for the users who do not need the team goal assignment any longer, and click *Done*. The team goal disappears from the goal plan of the unassigned users.

## 6.3.4 Editing or Deleting a Team Goal

On the *Team Goal* page, you can create a new Team Goal, search for the existing ones, and edit, assign, unassign, share, or delete them.

### Launch a Team Goal

As a manager, when you go to the Goal Plan page, you will find the *Launch Team Goal* link that takes you to the team goal page, also called the *Team Goal management view* page.

### Edit a Team Goal

To edit the Team Goal, click the corresponding *Actions* link, and select *Edit*. Update the Team Goals as required, and click *Save Changes*. The edits will reflect on the assignees' Team Goal.

### Delete Team Goal

You can delete the Team Goal you have created, and if the option, *Enable Delete Team Goals Share* has been enabled in *Admin Center* > *Goal Management Feature Settings*, then you can also delete the Team Goal shared with you.

To delete the Team Goal, click the corresponding *Actions* link, select *Delete*, and on the confirmation message that appears, click *OK*. The Team Goal is not only deleted, but also removed from all Goal Plans, including the ones for which the Team Goal was assigned by others.

## 6.4 Copying and Exporting Goals

You can copy goals between goal plans as well as export the goals from a particular goal plan. For example, you want to allow a user to copy a goal from the 2015 goal plan to the 2016 goal plan.

### Copying Goals from Other Goal Plans

You can enable the wizard for copying goals between goal plans by selecting the *Admin Center* > *Goal Management Feature Settings* > *TGM/CDP Objective Transfer Wizard* option. For example, a user can copy a goal from the 2014 goal plan into the 2015 goal plan.

Create permission in XML configurations and write permission for goal fields are required.

### Exporting Goals from Goal Plan (End User)

Exporting goals has useful benefits in certain circumstances:

- If you need to make universal changes for a large number of goals, or update values such as dates, status, and so on, you can export the goals, modify them, and then import them again. Using this procedure, you do not need to repeat the same update for each individual goal.
- You can also export goals if the information needs to be consumed by another system.

A user can export the goals from a particular goal plan page based on the permissions configuration. You need to add a new action permission `export-goal` in the goal plan template. The configuration is as follows:

```
<permission for="export-goal">
  <description><![CDATA[ Employee and Employees' manager can export the goals from
the objective plan.
 ]]></description>
    <role-name><![CDATA[EM]]></role-name>
    <role-name><![CDATA[E]]></role-name>
</permission>
```

## 6.5 Transferring Goals Between Users

As an Admin, you can transfer goals between users.

### Prerequisites

- The *TGM/CDP Objective Transfer Wizard* option is enabled in Provisioning.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

- You’re granted the permission *Manage User* > *Goal Transfer*.
- The users filled in the *Transfer From Employee* and the *Transfer To Employee* fields are in the target population of your permission role.

## Procedure

1. Go to *Admin Center* > *Goal Management* > *Transfer Goal Between Users*.

   The *Goal Transfer* page displays.
2. Search and fill in user for *Transfer From Employee* through *Find User*.
3. Search and fill in user for *Transfer To Employee* through *Find User*.
4. Click *Find Goals*.

   A table of goals of the "from" employee displays.
5. Select one or more goals that you want to transfer.

   You can check the first checkbox in the first column to select every goal in the table all at once. You can also select individual goals.

   i Note

   All comments and alignments are transferred with the goal. **Do not** transfer a source goal to a user who has been assigned the goal previously.
6. Click *Transfer*.

   A message displays informing you that the goals have been transferred successfully.

## Results

You have successfully transferred goals between users.

## 6.6 Using Goal Plan User Search

You can use *Goal Plan* user search to search goal plans of others on the *Goal Plan* page.

### Prerequisites

You have the *User Search* and the *Goal Plan Permissions* permissions.

### Procedure

1. Go to *Home* > *Goals*.
2. Choose the downward arrow next to the name of the avatar on the *Goal Plan* page.

   You can see not only names but also positions of your managers, peers, and direct reports with Goal Plan user search.
3. Type in the combo box to search for other users.
4. You can include inactive users by selecting the *Include inactive users in search* checkbox.

   > **Note**
   >
   > You can see the *Include inactive users in search* checkbox even if they don't have the permissions. The required permissions only affect the search results.

### Next Steps

- If you want to hide the *Include inactive users in search* checkbox, disable the *Include Inactive Employees in the search* permission through *Admin Center* > *Manage Permission Roles* > *Permission* > *Administrator Permissions* > *Manage Hires*.
- If you want to hide peers in search result, enable *Hide Peers* through *Admin Center* > *Tools* > *Platform Feature Settings* and save your changes.
- If you want to show matrix managers and matrix reports in search result, enable *Admin Center* > *Goal Management Feature Settings* > *Enable Goal Management People Selector*.

  > **Note**
  >
  > When you use *Goal Management People Selector*, the users' job titles, their peers, and the *Include inactive users in search* checkbox are hidden.

# 6.7 Mass Upload for Assigning

This feature enables mass upload functionality for the assigning process.

For mass assignment of goals, grant permissions for assigning group goals and for importing the goals in the application.

You can use a CSV file to assign certain targets for specific employees in one upload step. To accomplish this requirement, we updated the goal import (Mass Goal Import) to support an action of **assign** to accompany the existing **add**, **edit**, and **delete**. This value option was also added to the goal import template.

Since we leveraged Goal Import, which is an Admin Tool, permissions are unrestricted. If the necessary role-based permissions are granted to a user, the role permissions from the template are ignored (EM, EMM, EX, and so on).

The only exception is that the import does not allow the assignment of goals to the goal plan of an employee if the goal plan is in a “locked” permission state.

## 6.7.1 Mass Assign Assumptions

The following assumptions are made when dealing with mass upload for assigning.

1. When we give `ALL` under `FILTER_USERNAME` column in the CSV, we assign the goals to all the users in the target population.
2. To assign the goals to specific users, we give the usernames separated by a semicolon `;` under `FILTER_USERNAME` column in the CSV.
3. You can have an individual row for each `FILTER_USERNAME` if needed.
4. You can have an individual row each Target for each user if needed.
5. If we give a username under `FILTER_MGR_ID` column in the csv then the goal will be assigned to all the subordinates of that user who are in target population. This assumes all the employees are part of the target population of the assigner. If some listed employees are not part of the target population, the system will complete the assignment for those that are, and reject the ones who are not (reported in e-mail notification).
6. If we mention `FILTER_DEPT`, `FILTER_DIV`, or `FILTER_LOC`, then the goal will be assigned to the entire user matching the `DIV`, `DEPT`, `LOC` but who are in target population (assumes the employees are part of the target population). These fields can be utilized independently of each other (you are not restricted to identifying values for all the fields).
7. Other customer modules/processes are not impacted by these changes.
8. Import functionality respect plan state configuration, and will not be able to add, edit, or delete goals to an employee plan that is in a state that is restricted from these actions (Locked Plan).

# 6.7.2 Downloading CSV Header Template

The section describes how you can use the CSV header template.

## Procedure

1. Select *Goals* from the *Home* menu.
   The Goal Plan page shows.
2. Select *Generate CSV header* from the *Actions* dropdown.
   The CSV header template is downloaded.
3. Open the CSV header an add assignment information.
   Use the *assign* action option to fill in goal assignment information.

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| OBJ_PLAN_ID | 215 | | | | | | | | |
| OBJ_PLAN_NAME | 2012 Unit / Personal Incentivized Targets | | | | | | | | |
| DATE | Thu Apr 05 04:07:12 CEST 2012 | | | | | | | | |
| MAX_ERROR | | | | | | | | | |
| ^TYPE | ACTION | ID | SUBID | GUID | SUBGUID | FILTER_USERNAME | OBJECTIVE_weight | FILTER_CUSTOM01 | FILTER_CU |
| | ASSIGN | 3456 | | | | cgrant:mhoff:jlo | 50 | | |

## Results

You have successfully downloaded the CSV header template. You can now update the template with goal assignment information.

## Next Steps

- The FILTER_USERNAME allows the Assigner to populate one or more UserID's. Multiple UserID's are entered by separating the IDs with a semi-colon.
- You can have an individual row for each FILTER_USERNAME.
- You can have an individual row each Target for each user.
- Fields can be populated to be included in the assignment based on permissions settings configured for the Plan Template. For example, weights for targets can be populated in the template, and assigned to employee assuming that the assigner has been given edit permission for the field (via the template configuration).
- When using the action of assigning, some fields can remain empty (except for ID, FILTER_USER, ACTION). If they are not empty, then the behavior depends on the configuration of the form as to whether a field is a push down field or not. If a field is populated for a push down field that the assigner does not have access to, the system ignores that value.

- The assignment of new group goals allows you to make assignments to inactive users.
- The file size cannot exceed 5 MB.

## 6.7.3 Accessing Mass Assign Button

This section describes how you can access the mass assign button.

### Prerequisites

You have permissions for assigning group goals and for importing the goals in the application.

### Procedure

1. Go to *Home* > *Goals*.

   The *Goal Plan* page shows.
2. On the Goal Plan page, select *Mass Assign* from the dropdown of *Actions*.

   The *Assign Group Objective by uploading a CSV file* popup window appears. The *Mass Assign* button is a push feature, meaning it requires no any additional configuration to activate in addition to the permissions mentioned.
3. Click *Choose File* and select the CSV file with the goals defined for mass assigning.

   Select the *Allow Duplicate Assignment* checkbox if you want to allow for duplication.
4. Click *Upload*.

### Results

You have successfully assigned goals to multiple employees.

## 6.7.4 Running the Import Job

This solution is implemented as an offline, scheduled job, which has a status

1. The import job gets scheduled immediately (there is no schedule setting option).
2. It runs depending on the capacity of the quartz server.
3. It is not possible to view the status of the job from the admin interface however it is possible from provisioning to check on the status of a job (this step should not be necessary as jobs should not take a significant amount of time to run).

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

4. When the job is complete, an email is sent to the user who initiated the import.
5. The email has details like rows added, updated, deleted. For the new "assign" action, we will include additional messages for assigned as well.
6. If there is an error in the processing, we will include the reason for the error.
   **Error Examples:**
   - If a user is included in FILTER_USER field that is not part of the assigned population for the assigner
   - If accidentally, a definer (or any other user) tries to perform an assign operation

### Assigning the Target More than Once

Currently, from the existing user interface, we provide a warning when a user tries to assign the same goal twice, however that does not stop the assigner from assigning twice.

In the scenario that a duplicate assignment is included in the CSV import file, then the duplicate record will get rejected, and will be included in the e-mail report. It should be noted that in this situation, just the duplicate gets rejected. The other valid goal/targets will continue to be processed and assigned.

We provide a check box at the import screen, which would determine whether duplicating a goal is an allowed action during the mass assign. If checked, then the systems will allow the duplicate goals to be assigned. If unchecked, then the system will provide an error message in the job complete e-mail.

## 6.8 Goal Alignment Chart

Goal Alignment Chart provides employees, supervisors, and organizations with a quick, easy way to view goal accountability and track goal progress.

Goal Alignment Chart shows a hierarchical view of goals and cascaded goals, including the following fields:

- *Status*. The status of the goal execution.
- *Execution Actual*. The actual value of the metric that is measured for the goal execution.
- *Execution Target*. The target value of the metric that is measured for the goal execution.
- *Probability of Success*. The indicator that is used to estimate whether users can accomplish the goal.
- *Strategic/Non-Strategic Goal*. Identifies whether goals are strategic or nonstrategic.

> i Note
>
> - Customers use goal alignment through cascading or linking (this is a dependency for the Goal Alignment Chart).
> - Private goals are displayed in the Goal Alignment Chart fields only when the `private-access` permission is granted in the goal plan template.

- Goal Alignment Chart fields can only be used by one goal plan at a time.

Enabling Goal Alignment Chart [page 121]
To use Goal Alignment Chart, you need to enable it in Provisioning and Admin Center.

Configuring Goal Alignment Chart Fields [page 122]
Configure Goal Alignment Chart fields in goal plan templates to enable Goal Alignment Chart.

Configuring Goal Plan Layout for Goal Alignment Chart [page 124]
To display the Goal Alignment Chart fields in the goal plan, you must configure the `<plan-layout>` section of the XML.

## 6.8.1 Enabling Goal Alignment Chart

To use Goal Alignment Chart, you need to enable it in Provisioning and Admin Center.

### Prerequisites

Goal Management is purchased and enabled.

### Context

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

### Procedure

1. Go to *Provisioning* > *Company Settings*.
2. Under *Configure Goal Execution*, select the *Enable Goal Alignment Chart — requires "Version 11 UI framework (ULTRA)"* checkbox.
3. Go to *Admin Center* > *Manage Permission Roles*.
4. Select the role to which you want to grant permissions.
5. Select *Permission* and navigate to *User Permissions* > *Goals*.
6. Select the *Access Goal Alignment Chart* permission.

## Results

You've enabled Goal Alignment Chart.

## Next Steps

To select the goal plan to be used in Goal Alignment Chart, make sure that you've been granted the *Administrator Permissions* > *Manage Goals* > *Manage Configuration of Goal Alignment Chart* permission, and then go to *Admin Center* > *Goal Alignment Chart Settings*.

# 6.8.2 Configuring Goal Alignment Chart Fields

Configure Goal Alignment Chart fields in goal plan templates to enable Goal Alignment Chart.

## Context

The following standard fields are newly introduced with Goal Alignment Chart:

- `bizx-actual` (*Execution Actual*)
- `bizx-target` (*Execution Target*)
- `bizx-pos` (*Probability of Success*)
- `bizx-strategic` (*Strategic/Non-Strategic Goal*)

> **i Note**
>
> - The `bizx-actual` and `bizx-target` fields can be rolled-up to the goal owner's plan as a SUM or AVERAGE. (`rollup-calc-type="sum"`) or (`rollup-calc-type="avg"`).
> - The *Probability of Success* field is only configurable based on labels.

## Procedure

- Configure `bizx-actual`.

  Sample XML for Goal Plan Template (using a roll-up as a sum):

```
<field-definition id="bizx-actual" type="number" required="false" detail="false"
viewdefault="on" showlabel="false" field-show-coaching-advisor="false" cascade-
update="rollup" show-allow-rollup-override="true" rollup-calc-type="sum">
<field-label>Execution Actual</field-label>
<field-label lang="de_DE_SF">Tatsächlich</field-label>
<field-label lang="es_ES">Actual</field-label>
```

```
<field-label lang="fr_FR">Réalisation</field-label>
<field-label lang="ja_JP"></field-label>
<field-label lang="ko_KR"></field-label>
<field-label lang="nl_NL">Werkelijk</field-label>
<field-label lang="pt_BR">Atual</field-label>
<field-label lang="zh_CN">????</field-label>
<field-description>Bizx Actual</field-description>
<field-description lang="fr_FR">Actuel</field-description>
</field-definition>
```

- Configure `bizx-target`.

  Sample XML for Goal Plan Template (using a roll-up as a sum):

```
<field-definition id="bizx-target" type="number" required="false" detail="false"
viewdefault="on" showlabel="false" field-show-coaching-advisor="false" cascade-
update="rollup" show-allow-rollup-override="false" rollup-calc-type="sum">
<field-label>Execution Target</field-label>
<field-label lang="de_DE_SF">Bewertungsmaßstab</field-label>
<field-label lang="es_ES">Métrica</field-label>
<field-label lang="fr_FR_SF">Mesure</field-label>
<field-label lang="ja_JP"></field-label>
<field-label lang="ko_KR"></field-label>
<field-label lang="nl_NL">Meeteenheid</field-label>
<field-label lang="pt_BR">Métrica</field-label>
<field-label lang="zh_CN">??</field-label>
<field-description>BizX Target</field-description>
<field-description lang="fr_FR">Measure</field-description>
</field-definition>
```

- Configure `bizx-pos` by **always** having three enum values for this field and placing them in the last enum coding as follows:

```
<field-definition id="bizx-pos" type="enum" required="false" detail="false"
viewdefault="on" showlabel="false" field-show-coaching-advisor="false" cascade-
update="rollup" show-allow-rollup-override="true" rollup-calc-type="avg">
<field-label>Probability of Success</field-label>
<field-label lang="de_DE_SF"> Status</field-label>
<field-label lang="es_ES">Estatus</field-label>
<field-label lang="fr_FR_SF"> Statut</field-label>
<field-label lang="ja_JP"></field-label>
<field-label lang="ko_KR"></field-label>
<field-label lang="nl_NL">Status</field-label>
<field-label lang="pt_BR">Situação</field-label>
<field-label lang="zh_CN"></field-label>
<enum-value value="1" style="background:red;color:black;">
<enum-label>Low</enum-label>
</enum-value>
<enum-value value="2" style="background:yellow;color:black;">
<enum-label>Med</enum-label>
</enum-value>
<enum-value value="3" style="background:green;color:white;">
<enum-label>High</enum-label>
</enum-value>
<default-value>3</default-value>
</field-definition>
```

- Configure `bizx-strategic` by only having two values for this field as follows:

```
<enum-value value="0" style="background:white;color:black;">
<enum-label>Non-strategic</enum-label>
</enum-value>
<enum-value value="1" style="background:white;color:black;">
<enum-label>Strategic</enum-label>
</enum-value>
<default-value>0</default-value>
```

Sample XML for Goal Plan Template:

```
<field-definition id="bizx-strategic" type="enum" required="false"
detail="false" viewdefault="on" showlabel="false" field-show-coaching-
advisor="false" cascade-update="push-down" show-allow-rollup-override="false"
rollup-calc-type="avg">
<field-label>Strategic Goal</field-label>
<field-label lang="de_DE_SF"> Status</field-label>
<field-label lang="es_ES">Estatus</field-label>
<field-label lang="fr_FR_SF"> Statut</field-label>
<field-label lang="ja_JP"></field-label>
<field-label lang="ko_KR"></field-label>
<field-label lang="nl_NL">Status</field-label>
<field-label lang="pt_BR">Situação</field-label>
<field-label lang="zh_CN"></field-label>
<enum-value value="0" style="background:white;color:black;">
<enum-label>Non-strategic</enum-label>
</enum-value>
<enum-value value="1" style="background:white;color:black;">
<enum-label>Strategic</enum-label>
</enum-value>
<default-value>0</default-value>
</field-definition>
```

## 6.8.3 Configuring Goal Plan Layout for Goal Alignment Chart

To display the Goal Alignment Chart fields in the goal plan, you must configure the <plan-layout> section of the XML.

### Procedure

1. Locate the <plan-layout> element in the XML of the goal plan template.
2. Add the Goal Alignment Chart fields inside the <column weight> attribute.

```
<plan-layout>
    <column weight="1.0">
        <field refid="bizx-actual"/>
    </column>
    <column weight="1.0">
        <field refid="bizx-target"/>
    </column>
    <column weight="1.0">
        <field refid="bizx-pos"/>
    </column>
    <column weight="1.0">
        <field refid="bizx-strategic"/>
    </column>
</plan-layout>
```

# 6.9 Initiatives

You can create departmental, corporate, and division level initiatives, and allow employees to associate their personal goals with the initiatives.

A series of Initiatives can be bundled together under a common theme called Initiative Group.

> **i Note**
>
> The Initiative Groups are sorted in such a way that the initiatives, which are created, edited, or assigned most recently, appear on top of the list.

On the *Manage Initiatives* page, you can:

- Simplify the experience for top-down goal alignment.
- Align your goals across multiple initiative groups. For example, product management initiatives, and marketing initiatives.
- Generate reports on goal alignment for corporate, departmental, or divisional initiatives.

## Limitations

- You can't associate goals from goal libraries with initiatives upon creation. However, you can edit the goals to associate them with initiatives later.
- You can't assign initiatives to more than 15,000 users in a single transaction.
- Initiatives can't be imported, however, initiative groups can be imported via Import and Export Data.
- Initiatives can't be localized using 3-Tier Language Architecture.
- Initiatives aren't integrated with Performance Management.

## Answers to Some Key Questions on Initiatives

- **What happens when you're no longer assigned to the Initiative Group, but your goal was aligned to the initiative? Does it break the goal? Does the goal stay and the Initiative is disassociated? Is this shown in the audit trail?**
  Suppose that an Initiative Group is assigned to you, and you link your goal to one or more Initiatives within the group. Later, if you're unassigned from the Initiative Group, the Initiatives within that group no longer appears on your Goal. The dissociation between the goal of an employee and the Initiatives isn't indicated in the audit trail.
- **Can you link multiple Initiatives to a single Goal?**
  Yes. You may link as many Initiatives to a single goal, provided they're relevant to that goal. For example, an Initiative Group named "Customer Focus" may contain two Initiatives that center on customers – for example, "increase customer revenue" and "meet face to face with customers". At the Goal level, you may link your Goal to one or both Initiatives.

## 6.9.1 Enabling Initiatives

You can turn on the Initiatives function in *Admin Center*.

### Prerequisites

- The UI version is GM v12.
- The *Enable Initiatives*, *Enable Generic Objects*, *Enable the Attachment Manager*, and *Role-Based Permissions* options are enabled in *Provisioning*.
- You have the *Manage Initiatives* and *Share Initiatives* permissions.

### Procedure

1. Go to *Admin Center* > *Goal Management* > *Goal Management Feature Settings*.

   A list of Goal Management related settings shows.
2. Select *Enable Initiatives*.
3. Click *Save*.

### Results

You have successfully enabled the Initiatives in the application.

### Next Steps

You can now go to the *Manage Initiatives* page to use your initiatives and initiative groups.

## 6.9.2 Working with Initiatives

You can perform plenty of actions on initiatives to encourage employees to match their goals to your organizational initiatives.

Creating an Initiative Group [page 127]

You can create an Initiative Group with a bunch of relevant Initiatives, which you can assign and share with other employees.

Manage Initiatives [page 128]

On the *Manage Initiatives* page, you can create Initiative Group and Initiatives, search for the existing Initiative Groups, edit Initiatives, and assign, unassign, share, revoke or delete the Initiative Groups. The Initiative groups are merely containers of one or more Initiatives.

Assigning an Initiative Group [page 129]

You can assign an Initiative Group to employees and align the Initiative Group to specific Goal Plans.

Sharing an Initiative Group [page 130]

If you are the owner or co-owner of an Initiative Group, you can share the Initiative Group and its administrative privileges with other users or administrators.

# 6.9.2.1 Creating an Initiative Group

You can create an Initiative Group with a bunch of relevant Initiatives, which you can assign and share with other employees.

## Prerequisites

You have the *Manage Initiatives* permission.

## Procedure

1. Go to *Admin Center* > *Goal Management* > *Manage Initiatives*.

   The *Manage Initiatives* page shows.
2. Click *Create Initiative Group*.

   The *Create Initiative Group* popup window appears.
3. Enter information about your initiative group.

| Item | Description |
| --- | --- |
| **Initiative Group Name** | Give a name to your initiative group. |
| **Initiative Group Description** | Describe the main purpose of the initiative group. |
| **Active** | You can choose *Yes* to activate the initiative. |

4. Click *+ Add Initiative* to add initiatives to the initiative group.

   You can add multiple initiatives to an initiative group. But please note that you are recommended to load 100 or less initiatives in the *Manage Initiatives* page to ensure page loading performance. Please expect slower page loading, or in some extreme cases, page hanging, when there are too many initiatives showing in the page.
5. Enter *Initiative Name* and *Initiative Description*.
6. Click *Save*.

## Results

You have successfully created an initiative group with a bunch of relevant initiatives.

## Next Steps

You can further edit, assign, or share the initiative group.

# 6.9.2.2 Manage Initiatives

On the *Manage Initiatives* page, you can create Initiative Group and Initiatives, search for the existing Initiative Groups, edit Initiatives, and assign, unassign, share, revoke or delete the Initiative Groups. The Initiative groups are merely containers of one or more Initiatives.

> **Note**
>
> You are recommended to load 100 or less initiatives in the *Manage Initiatives* page to ensure page loading performance. Please expect slower page loading, or in some extreme cases, page hanging, when there are too many initiatives showing in the page.
>
> Here is a list of how to edit, revoke, and delete an Initiative Group. You can go to specific topics in this Chapter for detailed procedures about creating, assigning, sharing, and aligning personal goals to Initiative Groups.

## Edit an Initiative Group

To edit Initiatives, click the *Actions* link corresponding to the relevant 'Initiative Group', and select *Edit*. Update the 'Initiatives' and other details within the Initiative Group as required, and click *Save*. The edits reflect on the aligned Goal Plan of the assigned users.

## Revoke an Initiative Group

You can give up your ownership of the Initiative Group by revoking your access rights. Click the corresponding *Actions* link, select *Revoke*, and on the confirmation message that appears, click *Yes*. The Initiative Group no longer appears on your *Manage Initiatives* page. Please note that if you are the only owner of the Initiative Group, you cannot give up your ownership. This is to ensure that the Initiative Group has at least one owner.

## Delete an Initiative Group

To delete an Initiative Group you own, click the corresponding *Actions* link, select *Delete*, and on the confirmation message that appears, click *OK*. The Initiative Group is not only deleted, but also removed from all Goal Plans, including the ones with which the Initiative Group was aligned by others.

# 6.9.2.3 Assigning an Initiative Group

You can assign an Initiative Group to employees and align the Initiative Group to specific Goal Plans.

## Prerequisites

You have the *Manage Initiatives* permission.

## Procedure

1. Go to *Admin Center* > *Goal Management* > *Manage Initiatives*.

   The *Manage Initiatives* page shows. You can see a list of initiative groups.
2. Click the *Actions* icon corresponding to the relevant Initiative Group, and select *Assign*.

   The *Initiative group Assignment* popup window appears.
3. Under the *Assign To User* tab, select the users whom you want to assign the Initiative Group to.

   For example, you can choose *Department* in the *Pick a Catergory* field. Click *[click to edit]*, the *Research Results* popup window shows. Enter a keyword and click the search icon. Select your target assignee group and click *Done*. You can check the number of assignees you have chosen by clicking *Update* on the *Active Group Membership* tile.
4. Under the *Align With Goal Plan* tab, select the goal plans that you want to align the Group Initiative with.
5. Click *Done*.

## Results

The Initiative Group has been assigned to the selected users, and will appear on the selected Goal Plans when the assignees add or edit a Personal Goal.

## Next Steps

You can check the membership of the Initiative Group by clicking the number under *Group Members*.

# 6.9.2.4 Sharing an Initiative Group

If you are the owner or co-owner of an Initiative Group, you can share the Initiative Group and its administrative privileges with other users or administrators.

## Prerequisites

- You have the *Manage Initiatives* and the *Share Initiatives* permissions.
- The users with whom you share the Initiative Group must have the *Manage Initiatives* permission.

> **i Note**
>
> To share the right of deleting the Initiative Group, ensure that the Provisioning option, *Enable Delete Team Goals Share* has been enabled.

## Procedure

1. Go to *Admin Center* > *Goal Management* > *Manage Initiatives*.

   The *Manage Initiatives* page shows. You can see a list of initiative groups.
2. Click the *Actions* icon corresponding to the relevant Initiative Group, and select *Share*.

   The *Share Initiative* popup window appears.
3. Enter the *Employee* with whom you want to share the Initiatives.
4. Click the name from the dropdown. The user is automatically added to the share list.
5. Click *Done*.

## Results

The Initiative Group has been shared with the selected users. The selected users become the co-owners of the Initiative Group. The co-owners can assign, share, edit or even delete the Initiative Group.

### Next Steps

To remove the ownership of the Initiative Group from users, you can simply click the *Actions* icon, select *Share*, and unselect anyone whom you want to remove the ownership from, including yourself. Please note that if you are the only owner of the Initiative Group, you cannot remove yourself. This is to ensure that the Initiative Group has at least one owner.

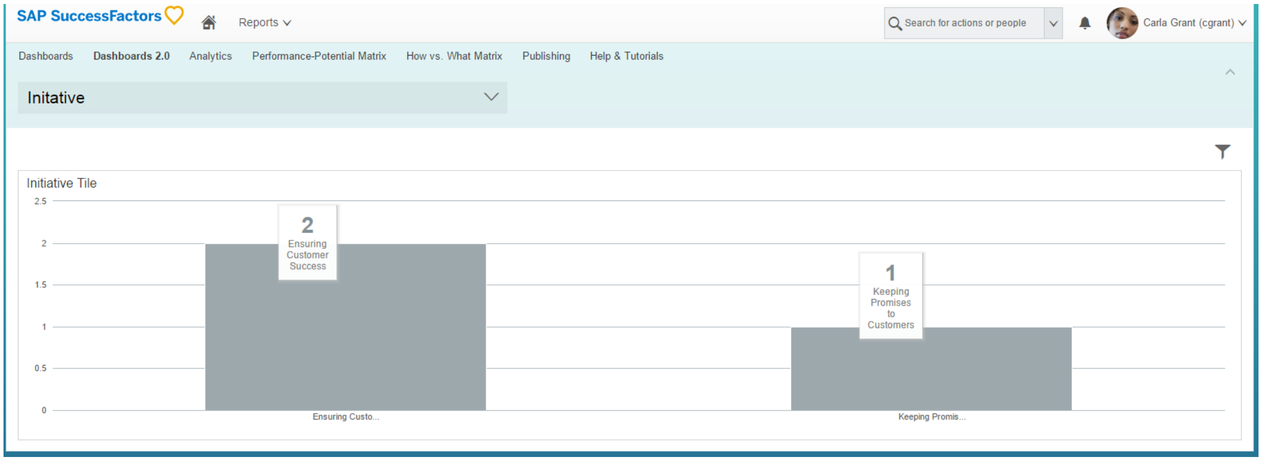
## 6.9.3 Reporting on Inititatives

You can run a variety of Ad Hoc reports on Initiatives.

The following are available report definition types available for Initiatives:

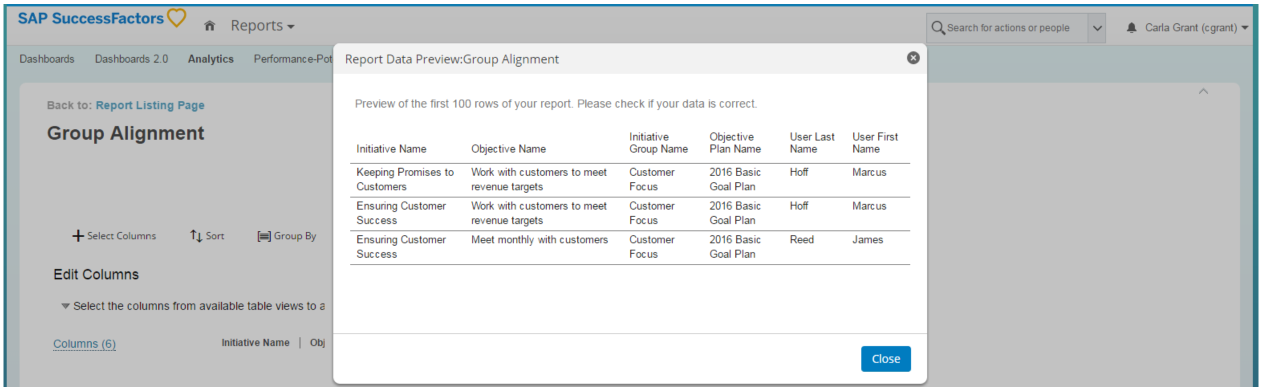
- **Initiative Group**: Run reports on the types of Initiative Groups and Initiatives within those groups.
- **Initiative Group Share**: Run reports for users who co-own for the Initiative Groups.
- **Initiative Group Assign**: Run reports for users who have been assigned with Initiative Groups and their corresponding Initiatives.
- **Initiative Group Align**: Run reports for users who have aligned their personal Objectives (Goals) to the assigned Initiatives. This is particularly useful to measure overall alignment of personal goals to corporate, divisional and/or departmental initiatives.

> **i Note**
>
> You can construct YouCalc tiles and embed in a dashboard to gauge initiative alignment.




### Example of an Ad Hoc Report on Alignment of Initiatives

Once Initiatives are aligned, you can gauge the degree of workforce alignment to those initiatives through ad-hoc reporting. This example shows an ad-hoc report of single domain type, with Objectives that have been physically aligned to the Initiatives.




## 6.9.4 Aligning Personal Goals to Assigned Initiatives

Once an Initiative Group has been assigned to you, and aligned to your Goal Plan, it appears on your Goal Plan whenever you add or edit a Personal Goal. You can align your Personal Goals to specific Initiatives of the Initiative Groups.

### Prerequisites

- You have the *Goal Management Access* permission.
- At least one Initiative Group has been assigned to you, and aligned to one of your Goal Plans.

### Procedure

1. Go to *Goals* > *Goal Plan*.
2. Select the goal plan which the Initiative Group has been aligned to.
3. Align your personal goals to the assigned Initiatives.

| Scenario | Procedure |
|---|---|
| **Edit a Personal Goal.** | Select *Edit Goals* from the dropdown of the *Action* menu. The *Edit Goal* popup window shows. Select the initiatives that you want to align the goal with. |
| **Add a Personal Goal.** | Click *+ Add Goal* from the header. Select *Create a New Goal* from the dropdown. Select *+ Personal Goal*. Select the initiatives that you want to align the goal with. |

4. Click *Save Changes*.

## Results

You have successfully aligned your personal goal to the assigned Initiative Group.

# 7 Measuring Goal Achievements

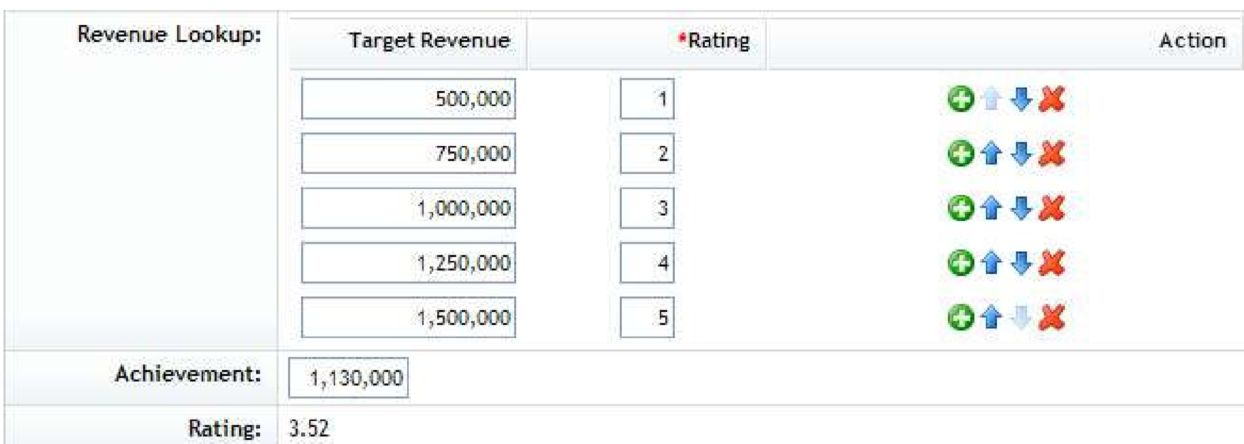
Learn about how to use the metric lookup table or custom calculations to measure goal achievements.



## 7.1 Sample Use Case

Here is a sample use case for goals and rating with achievement lookup.

The employee is a sales representative. One of their goals is to generate 1 million dollars of revenue this year. If they bring in 1 million dollars, they meet their goal, and they get 3 out of 5 as a rating. If they bring in 1.25 million dollars, they get a 4. 1.5 million is a 5. 750,000 is a 2. 500,000 a 1.




The employee now knows the targets that they must achieve and where the different cutoff points are. Let's say at the end of the year the sales representative has generated 1.13 million dollars in revenue. Using the metric lookup table the system calculates a rating for this goal. The rating will then be pulled into a PM form to be used as the rating for this goal.

There are two supported calculation types: step and interpolate. In this example, the system either calculates the goal rating to be 3 (step), or 3.52 (interpolate).

## 7.2 Creating Goals and Ratings with Achievement Lookup

Customers can generate a calculated goal rating for a goal on a goal plan.

This calculated rating will then be pulled into PM forms for use as the rating for that goal. The purpose of this feature is to quantify what a rating value actually means to the user in real world terms.

### 7.2.1 Metric Lookup Basics

You can use metric lookup table to calculate ratings of a goal. A basic metric lookup table consists four items.

A basic metric lookup table consists of the following items:

1. Target levels to achieve
2. Ratings associated to those target levels
3. A place to enter the actual achieved value
4. The calculated rating that results from mapping the actual achievement in the metric lookup table.

Three types of fields (`field-definition id`) are required in the XML template to enable rating calculation: `rating`, `metric-lookup-table`, and `actual-achievement` or `actual-achievement-text`.

| Field | Type | Description |
|---|---|---|
| `rating` | `number` | Stores the rating calculated by comparing the actual-achievement with the target achievement values. |
| `metric-lookup-table` | `table` | Stores the target achievement values. |
| `actual-achievement` | `number` | Stores the actual achievement value. |
| `actual-achievement-text` | `text` | |

Correspondingly, three columns (`table-column id`) can be configured to display on the UI. A minimum of two columns are required. One column must be the rating column. The second column is either the achievement or the achievement-text column.

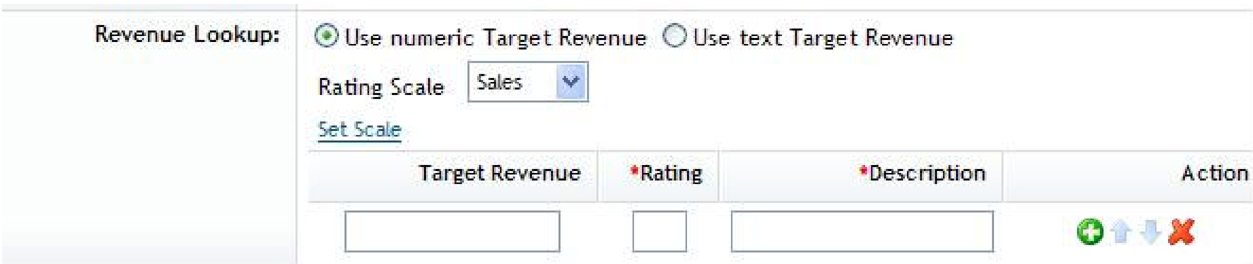
| Column | Type | Optional or Mandatory |
|---|---|---|
| `achievement` | `number` | Optional |
| `achievement-text` | `text` | Optional |
| `rating` | `number` | Mandatory |
| `description` | `text` | Optional |

The configuration for the metric lookup table applies at the goal plan level instead of the goal level. It does not mean that every goal in a goal plan must have a calculated rating. But it does mean that you cannot have one goal calculate a rating using step, while another goal calculates a rating using interpolation. Step and interpolation are two calculation types.

## 7.2.2 Numeric vs. Text Target Levels

While not a commonly used configuration, the system supports the ability to enter text target achievement levels.

A goal plan can be configured to support either or both achievement types. So a single goal plan can have two goals which use different target achievement types. The text achievement only works with calculation type "step" and is an exact match between actual text achievement and text target level. The table-column id for text achievement is "achievement-text" and the actual text achievement field-definition is "actual-achievement-text". When both text and numeric achievement are configured, the user has an option to select between the two types.




## 7.2.3 XML Example for Goals and Ratings with Achievement Lookup

The following is an example of an XML for goals and ratings with achievement lookup.

### Example

#### XML Examples

```
<field-definition id="metric-lookup-table" type="table" required="false"
detail="false" viewdefault="on" showlabel="false"default-calc-type="step" field-
show-coaching-advisor="false">
<field-label>Achievement Lookup</field-label>
<table-row-label>Achievement Lookup Table</table-row-label>
<table-column id="achievement" type="number" required="true">
<column-label>Target Level</column-label>
<column-description>Target Level</column-description>
</table-column>
<table-column id="rating" type="number" required="true">
<column-label>Score</column-label>
<column-description>Score</column-description>
</table-column>
<table-column id="description" type="text" required="true">
<column-label>Description</column-label>
<column-description>Description</column-description>
</table-column>
<rating-scale>
<rating-scale-id>Metric Lookup Scale</rating-scale-id>
</rating-scale>
</field-definition>
```

```
<field-definition id="metric-lookup-table" type="table" required="false"
detail="false" viewdefault="off" showlabel="false" default-calc-type="interpolate"
```

```
field-show-coaching-advisor="false" cascade-update="push-down" use-min-target-as-
rating="true">
<field-label>Achievement Levels</field-label>
<table-row-label>Achievement Lookup Table</table-row-label>
<table-column id="achievement" type="number" required="false" cascade-update="push-
down">
<column-label>Target Level</column-label>
<column-description>Target Level</column-description>
/table-column>
<table-column id="rating" type="number" required="false" cascade-update="push-down">
<column-label>Score</column-label>
<column-description>Score</column-description>
</table-column>
<table-column id="description" type="text" required="false" cascade-update="push-
down">
<column-label>Description</column-label>
<column-description>Description</column-description>
</table-column>
<rating-scale rate-on-form-option="false" default="true">
<rating-scale-id>OBPerformance</rating-scale-id>
</rating-scale>
</field-definition>
```

## 7.2.4 Calculation Types

You can configure your goal plan with one of two calculation types, step or interpolation. Make sure you understand the basics of the metric look up table before you read topics of calculation types.

The calculation configuration is defined in the field-definition for metric lookup table. Accepted values are `step` or `interpolate.`

### 7.2.4.1 Step

You can calculate actual ratings with the calculation method of step. The step calculation type treats target achievement values as thresholds.

For example, the below Target Rating Table is your lookup table.

Target Rating Table

| Target | Rating |
|---|---|
| 20 | 1 |
| 30 | 2 |
| 40 | 3 |
| 50 | 4 |
| 70 | 5 |

Actual Achievement Calculations

| Actual Achievement | Calculated Actual Rating |
|---|---|
| 20 | 1 |
| 25 | 1 |
| 55 | 4 |
| 80 | 5 |

You can calculate the actual ratings using step based on the Target Rating Table and Actual Achievement values. In the example, the actual achievement of an employee is 25, which is in between of the 20 threshold and the 30 threshold, the actual rating is 1.

Here is an XML example for you to configure the step calculation type. The exact configuration depends on your system settings.

Sample Code

```
<field-definition id="metric-lookup-table" type="table" required="false"
detail="false" viewdefault="on" showlabel="false"default-calc-type="step" field-
show-coaching-advisor="false">
<field-label>Achievement Lookup</field-label>
<table-row-label>Achievement Lookup Table</table-row-label>
<table-column id="achievement" type="number" required="true">
<column-label>Target Level</column-label>
<column-description>Target Level</column-description>
</table-column>
<table-column id="rating" type="number" required="true">
<column-label>Score</column-label>
<column-description>Score</column-description>
</table-column>
<table-column id="description" type="text" required="true">
<column-label>Description</column-label>
<column-description>Description</column-description>
</table-column>
<rating-scale>
<rating-scale-id>Metric Lookup Scale</rating-scale-id>
</rating-scale>
</field-definition>
```

## 7.2.4.2 Non-Linear Step Warning

This feature lets customers choose to display a warning message in MLT if the achievement and rating levels are non-linear (that is, if the slope changes between the achievement / rating values in the table).

**Configuration** - In the objective plan template we need to add the following configuration for enabling this feature.

Note

This configuration will support only for “metric-lookup-table”.

```
<field-definition id="metric-lookup-table" type="table" required="false"
detail="false" viewdefault="on" showlabel="false"default-calc-type="interpolate"
field-show-coaching-advisor="false" cascade-update="push-down"   linearity="true">
......... .
```

```
< /field-definition >
```

### 7.2.4.3 Interpolation

You can calculate proportionally accurate actual ratings with the calculation type of interpolation.

For example, the below Target Rating Table is your lookup table. In your instance, the actual achievement of an employee is 25. This actual achievement is not an exact number in the metric lookup table. It is between 20 and 30. If you want to calculate a proportionally accurate actual rating for this employee, you can use the interpolation method with the following calculation formula:

(actual_achievement - achievement_low ) / (achievement_high-achievement_low) = (actual_rating - rating_low ) / (rating_high-rating_low).

Target Rating Table

| Target | Rating |
|---|---|
| 20 | 1 |
| 30 | 2 |
| 40 | 3 |
| 50 | 4 |
| 70 | 5 |

Actual Achievement Calculations

| Actual Achievement | Calculated Actual Rating |
|---|---|
| 20 | 1 |
| 25 | 1.5 |
| 55 | 4.25 |
| 80 | 5 |

If the Actual Achievement is 25, then the Actual Rating can be calculated as: (30-20)/(2-1)=(25-20)/(Calculated Actual Rating-1), where the Calculated Actual Rating=1.5

If the Actual Achievement is 55, then the Actual Rating can be calculated as: (70-50)/(4-3)=(55-50)/(Calculated Actual Rating-3), where the Calculated Actual Rating=4.25

Here is an XML example for your to configure the interpolation calculation type. The exact configuration depends on your system settings.

Sample Code

```
<field-definition id="metric-lookup-table" type="table" required="false"
detail="false" viewdefault="off" showlabel="false" default-calc-
type="interpolate" field-show-coaching-advisor="false" cascade-update="push-
down" use-min-target-as-rating="true">
<field-label>Achievement Levels</field-label>
<table-row-label>Achievement Lookup Table</table-row-label>
<table-column id="achievement" type="number" required="false" cascade-
update="push-down">
<column-label>Target Level</column-label>
```

```
<column-description>Target Level</column-description>
/table-column>
<table-column id="rating" type="number" required="false" cascade-update="push-
down">
<column-label>Score</column-label>
<column-description>Score</column-description>
</table-column>
<table-column id="description" type="text" required="false" cascade-update="push-
down">
<column-label>Description</column-label>
<column-description>Description</column-description>
</table-column>
<rating-scale rate-on-form-option="false" default="true">
<rating-scale-id>OBPerformance</rating-scale-id>
</rating-scale>
</field-definition>
```

**i Note**

Interpolation does not work with `actual-achievement-text`. If the rating calculation is configured to use Interpolation but the users enter text values, the Step calculation type is performed.

### 7.2.4.4 Out of Bounds Calculations

This section defines what the system does when the actual achievement falls outside of the range defined in the target level rows.

Let's take the following example:

Target Rating Table

| Target | Rating |
|---|---|
| 20 | 1 |
| 30 | 2 |
| 40 | 3 |
| 50 | 4 |
| 70 | 5 |

- **Upper Bound**: The system always gives the highest rating value when the actual achievement is above the highest target level. An actual rating of 71 gets a 5.
- **Lower Bound**: There are two options for how the system handles actual achievements below the lowest target level. This option is configured through the attribute `use-min-target-as-rating` defined in the `field-definition` for the `metric-lookup-table`. Accepted values are `true` and `false`.
  - `true` – When the actual achievement falls below the lowest target level, then provide the rating associated to the lowest target level. In the example, an actual achievement of 18 would result in a rating of 1.
  - `false` – When the actual achievement falls below the lowest target level, then provide a rating of 0. In the example, an actual achievement of 18 would result in a rating of 0.

**i Note**

When the attribute is set to `true`, the rating is a value of 1 and the rating scale range is 1-5. When the attribute is set to `false` and the rating is 0, then the rating scale range changes to 0-5. This could cause confusion for customers when ratings are normalized on a Performance Management form. For example, a customer has a goal plan with two goals on it. One goal has a rating of 1 with a scale of 1-5. The other goal has a rating of 0 with a scale of 0-5. If the Performance Management form has a rating scale of 1-5, then both ratings are treated as a `1`. If the attribute is set to `false`, it is recommended that all rating scales also have a 0 entry.

## 7.2.5 Display Configurations

Here we describe the different display configurations possible for goals and ratings.

### Description Column

The metric lookup table supports an additional column which represents the description of the rating value. This column can be included through the table column id `description` in the metric lookup table field definition.

```
<table-column id="description" type="text" required="false">
<column-label>Description</column-label>
<column-description>Description</column-description>
</table-column>
```

### Calculated Rating

The calculated rating field can be configured to display in one of the following formats. This configuration is controlled through the `<display>` attribute on the rating field definition. Accepted values are:

- `number` – Only shows the numeric value. Interpolation calculation type will always display numeric value regardless of the configuration option.
- `text` – Only the description is displayed.
- `number-text` – Both numeric value and description are displayed. This format only works when `<default-calc-type="step">` is configured.

The calculated goal rating displays on a Performance Management form regardless of how it was configured in the goal plan. The rating appears the same way it does on the goal plan as it does on the Performance Management form.

```
<field-definition id="rating" type="number" required="false" detail="false"
viewdefault="on" showlabel="false" field-show-coaching-advisor="false"
{color:#ff0000}display="number-text"{color}>
    <field-label lang="en_US">Rating</field-label>
    <field-description>Score</field-description>
    <default-value>0.0</default-value>
</field-definition>
```

### Column Ordering

Column ordering controls the ascending or descending order required for numeric target levels and ratings columns in the metric lookup table. This configuration is controlled through the table-column attribute `<order>`. The system requires that values placed in those columns are in the correct order. This only applies to table-column ID of `"achievement"` and `"rating"`. Accepted values are `asc`, `desc`, and `both`. The default value is `both`.

- `asc` - must be of ascending order
- `desc` - must be of descending order
- `both` - can either be in ascending order or descending order

```
<field-definition id="metric-lookup-table" type="table" required="false"
detail="true" viewdefault="on" showlabel="true"default-calc-type="interpolate"
display="text" field-show-coaching-advisor="false">
    <field-label lang="en_US">Achievement Levels</field-label>
    <table-row-label>Achievement Lookup Table</table-row-label>
    <table-column id="achievement" type="number" required="false" order="both">
      <column-label lang="en_US">Target Level</column-label>
      <column-description>Target Level</column-description>
    </table-column>
    <table-column id="rating" type="number" required="false" order="asc">
      <column-label lang="en_US">Score</column-label>
      <column-description>Score</column-description>
    </table-column>
    <table-column id="description" type="text" required="false">
      <column-label>Description</column-label>
      <column-description>Description</column-description>
    </table-column>
  </field-definition>
```

The default is to allow the achievement column to be either ascending or descending and to force the rating scale to be ascending. It is because some achievements should result in a better rating as the achievement decreases. For example, number of errors per 1000. Fewer errors are good and therefore should result in a better rating.

## 7.2.6 Automatic Population

Automatically calculate actual ratings and different levels of target achievements based on configurations defined in the goal plan.

Automatic Rating Scale Population [page 143]
Customers can enable calculated ratings with or without a rating scale.

Automatic Actual Rating Population [page 143]
You can configure the goal plan so that it automatically calculate actual ratings based on the metric lookup table and actual achievements.

Detailed Miscellaneous Behaviors [page 144]
This section describes miscellaneous behaviors in goal rating calculations.

Automatic Target and Rating Scale Population [page 145]
This feature primarily serves to auto populate the target levels based on configurations defined in the goal plan.

Auto-Create Target Entries for Metric (Achievement) Lookup [page 147]

You can use this feature to auto-calculate different levels of target achievement based on the levels of percent achievement that will be paid out for.

## 7.2.6.1 Automatic Rating Scale Population

Customers can enable calculated ratings with or without a rating scale.

This basically just pre-populates the rating column with values defined from a system rating scale.

If a default rating scale is configured, the rating scale will be displayed in the *Create Goal* and *Edit Goal* screens rather than as a button as shown in other sub-goals. By deleting all the rating scale rows, the metric lookup table will be closed showing a green + button. To configure a rating scale with the calculated ratings feature, add the 'rating-scale' field to identify the rating scale you wish to use inside the field-definition for a metric-lookup-table field. An optional default attribute can be used to specify what rating scale is the default rating scale. Possible options are **true** and **false**. The default is true (for backwards compatibility reasons) but only the last "true" rating scale will be the default rating scale.

### Example

```
<rating-scale default ="true">
<rating-scale-id>Metric Lookup Scale</rating-scale-id>
</rating-scale>
```

Customers can define more than one rating scale for the calculated ratings feature. When this happens, employees will see a dropdown which will allow the employee to select the rating scales to be copied into the metric lookup table.

> **Note**
>
> The default rating scale is used to normalize goal ratings with Performance Management ratings. If there is no default rating scale, the calculated rating cannot be copied across to a performance management form.

## 7.2.6.2 Automatic Actual Rating Population

You can configure the goal plan so that it automatically calculate actual ratings based on the metric lookup table and actual achievements.

For example, the below Target Rating Table is your lookup table:

Target Rating Table

| Target Achievement | Target Rating |
|---|---|
| 20 | 1 |

| Target Achievement | Target Rating |
|---|---|
| 30 | 2 |
| 40 | 3 |
| 50 | 4 |
| 70 | 5 |

You want to calculate the Actual Rating in the below Actual Achievement Calculations table:

Actual Achievement Calculations

| Actual Achievement | Actual Rating |
|---|---|
| 20 | |
| 25 | |
| 55 | |
| 80 | |

You can populate the actual ratings automatically by adding the following configuration to your XML form:

Sample Code

```
<auto-population field="rating" mode="auto">
<rule>
<calculated-result calculator-id="GM_MLT_BASED_RATING_CALCULATOR"/>
</rule>
</auto-population>
```

## 7.2.6.3 Detailed Miscellaneous Behaviors

This section describes miscellaneous behaviors in goal rating calculations.

The rating is calculated when the goal is saved after any changes. If the goal plan includes the metric-lookup-table field, validation will ensure that the user does not enter only 1 row, which would result in a rating calculation error. However the user may opt to enter 0 rows, bypassing the automatic calculation. The logic that the application follows when determining whether to calculate a rating is as follows:

1. If 2 or more rows are entered in the lookup table, and actual achievement has been entered, calculate the rating.
2. If no rows are entered in the lookup table and actual achievement is 0, the rating is not calculated, and the goal can be rated on the form just like a regular goal.

As with any fields in the TGM template, all 3 fields must be permissioned appropriately and included on the plan and form layouts if desired. The rating field, however, will always be read-only, even if write permission is granted.

Typically, you will want to limit write permission for the metric lookup table and actual achievement to managers, otherwise employees could essentially set their own ratings of record.

> **i Note**
>
> To edit goals with this configuration on a form, you must set `obj-edit="popup"` in the form objective section. (The metric lookup table cannot be edited in on-form editing mode.) A rating scale does not need to be specified in the TGM template or goal. The maximum & minimum for the rating (stored in the system to determine normalized ratings) is determined by the possible ratings in the lookup table.

### Rules About the Rating Calculation

1. The field definition flag `use-min-target-as-rating` determines the behavior of the minimum rating value. If `use-min-target-as-rating="false"` for the calculated rating field, and the value goes below the minimum rating value, the calculated rating will be "0". If the `use-min-target-as-rating="true"`, the minimum possible rating value is the minimum rating. The default value of the `use-min-target-as-rating` is `"false"`, so adding `use-min-target-as-rating="false"` or simply leaving this code out of the XML, the results are the same.
2. The calculated rating can never exceed the maximum rating possible in the lookup table.
3. If a rating scale is associated to the calculated rating feature, the rating scale will be automatically displayed.

## 7.2.6.4 Automatic Target and Rating Scale Population

This feature primarily serves to auto populate the target levels based on configurations defined in the goal plan.

The sample use case would be: A user selects from a drop-down the rating scale/type to be used for this goal. The user also enters a target baseline value. Based on these two selections the system will populate the metric lookup table. The requirements to enable this feature are:

1. Define a field-definition for the target baseline
2. Configure target-to-rating mappings in the goal plan so values can be pre-populated

So the use case would be:

| % of Target Baseline | Rating |
|---|---|
| 80% | 60 |
| 90% | 80 |
| 100% | 100 |
| 110% | 120 |
| 125% | 140 |

**Target Baseline**

```
<field-definition id="target-baseline" type="number" required="false"
detail="false" viewdefault="on" showlabel="false" field-show-coaching-
advisor="false">
    <field-label>Target Baseline</field-label>
    <field-description>Target Baseline</field-description>
    <default-value>0.0</default-value>
</field-definition>
```

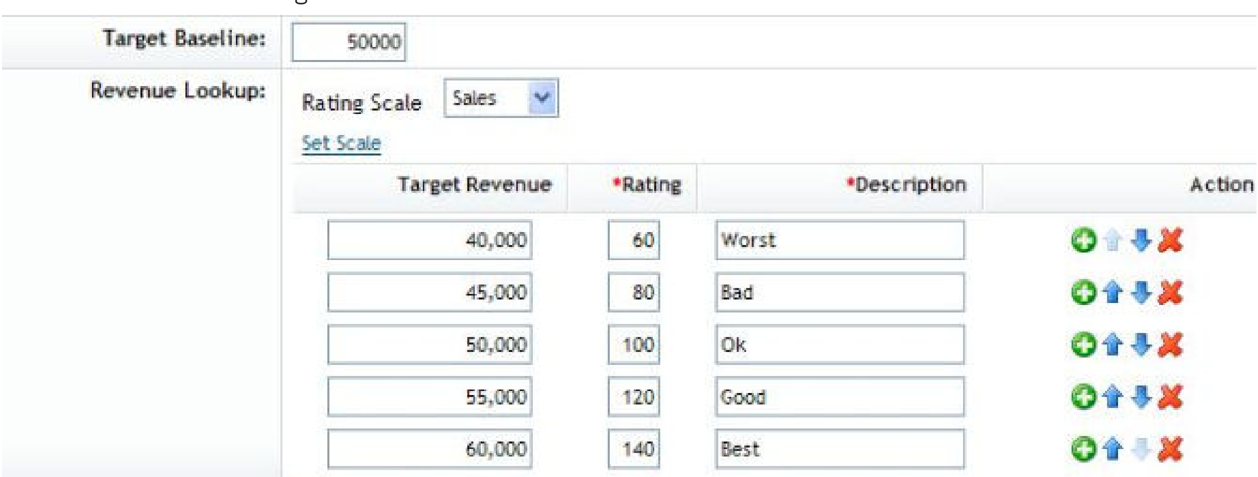
**Mapping XML**

```
<metric-lookup-table-target-auto-population id="sales">
   <scale-name>Sales</scale-name>
      <mapping baseline-percent="80" rating="60">
        <mapping-description>Worst</mapping-description>
      </mapping>
      <mapping baseline-percent="90" rating="80">
        <mapping-description>Bad</mapping-description>
      </mapping>
      <mapping baseline-percent="100" rating="100">
        <mapping-description>Ok</mapping-description>
      </mapping>
      <mapping baseline-percent="110" rating="120">
        <mapping-description>Good</mapping-description>
      </mapping>
      <mapping baseline-percent="120" rating="140">
        <mapping-description>Best</mapping-description>
      </mapping>
  </metric-lookup-table-target-auto-population>
```

→ Remember

This code snippet is a sample configuration. The exact configuration depends on your system settings.

This will create the following UI:




The system calculates the target levels based on percentage of the target baseline and populates the target level column. The system accepts multiple mappings and that will result in additional entries in the Rating Scale drop-down in the UI.

## 7.2.6.5 Auto-Create Target Entries for Metric (Achievement) Lookup

You can use this feature to auto-calculate different levels of target achievement based on the levels of percent achievement that will be paid out for.

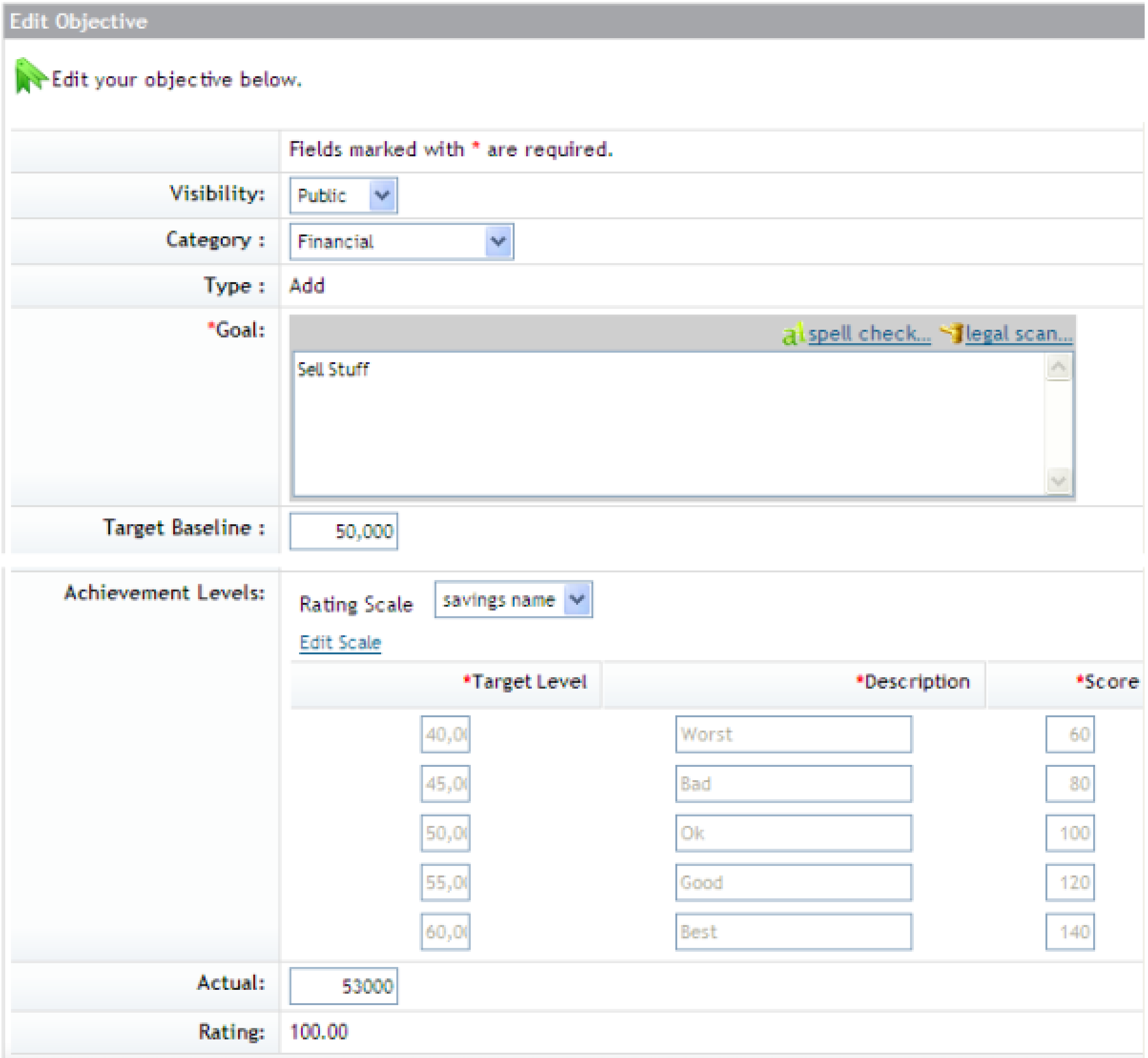
Goals can have a positive or a negative correlation of achievement to percent payout.

Through appropriate configuration of the goal plan, a user can select a merit guideline, which defines scores based on % achievement of target along with a textual descriptor. Then the user enters in the target achievement level (target baseline). Based on this information the system will automatically calculate all the appropriate target achievement for the different levels of merit as defined in the merit guideline.

For example My generic "SALES" Merit Guideline could be:

- 80% Achievement Pays
- 60% of Bonus WORST
- 90% Achievement Pays
- 80% of Bonus BAD
- 100% Achievement Pays
- 100% of Bonus OK
- 110% Achievement Pays
- 120% of Bonus GOOD
- 200% Achievement Pays
- 140% of Bonus BEST

So when you create your goal, and set the Target Baseline and Merit Guideline, the system automatically generates the Achievement Levels as follows: Target Baseline = $50,000 (entered)




**i Note**

You can use multiple "Merit Guidelines" in both ascending and descending scale formats. You can choose either Interpolated or Step achievement lookups. Any automatically calculated level or score can be overridden using the *edit scale*option displayed directly under the *Rating Scale* drop-down. Maximum limit for B1009 is 100 rows.

## Configuration

Configuration is done in the goal template XML (no associated admin or provisioning switches) and requires the following settings (an example goal template XML file is attached for ease):

1. Set default-calc-type="Interpolation" or "Step".
2. Set use-min-target-as-rating=false for example.: <field-definition id="metric-lookup-table" type="table" required="false" detail="false" viewdefault="on" showlabel="false" default-calc-type="interpolate" field-show-coaching-advisor="false" use-min-target-as-rating="false">

3. Set achievement/rating as numeric by setting: for example.: <table-column id="achievement" type="number" required="true">
4. Set order="both" in the template for Target and Rating. For example.: <table-column id="rating" type="number" required="true" order="both">
5. Add a Target Baseline field in the Goal Template.

```
<field-definition id="target-baseline" type="number" required="false"
detail="false" viewdefault="on" showlabel="false" field-show-coaching-
advisor="false">
  <field-label>Target Baseline </field-label>
</field-definition>
```

6. Set up to autopopulate target values from the goal template:

```
<metric-lookup-table-target-auto-population id="sales" >
<scale-name>sales name</scale-name>
  <mapping baseline-percent="80" rating="60">
    <mapping-description>Worst</mapping-description>
  </mapping>
  <mapping baseline-percent="90" rating="80">
    <mapping-description>Bad</mapping-description>
  </mapping>
  <mapping baseline-percent="100" rating="100">
    <mapping-description>Ok</mapping-description>
  </mapping>
  <mapping baseline-percent="110" rating="120">
    <mapping-description>Good</mapping-description>
  </mapping>
  <mapping baseline-percent="120" rating="140">
    <mapping-description>Best</mapping-description>
  </mapping>
</metric-lookup-table-target-auto-population>
```

## 7.3 Custom Calculations

You can configure calculated fields, which provides a very powerful feature.

Some examples of commonly requested calculated fields are:

- Goal Score: Rating x Weight
- Run Rate: Actual / (Current Date – Start Date)
- Year End Forecast (based on current Run Rate): Run Rate x (Due Date – Start Date)
- Target Run Rate: Target / (Due Date – Start Date).
- Year End Forecast (based on Target Run Rate): Actual + (Target Run Rate x (Due Date – Current Date))
- Proposed Run Rate: (Target – Actual) / (Due Date – Current Date)

To get started, see the “Custom Calculation Example” topic, which shows examples of commonly calculated fields.

In the “Custom Calculation DTD” topic you can find details of how to use the elements in custom calculations.

Descriptions of the calculations, functions and operators that can be used with these elements are provided in the topic “Calculations, Functions and Operators”.

There are also special case topics on “Goal Plan and/or Category Score Total” and “Sub-goal Calculated Rating”.

Below are some examples showing:

- Defining calculation
- Logical & comparison operators
- Table results

## Example: Defining Calculation

Use Case: Define a calculator that will calculate the run rate for a goal. Actual / (today - start date) represented in months

```
<calculator id="runRate">
    <![CDATA[actual_achievement/FUNC.diff(NOW, start, MONTH)]]>
</calculator>
<auto-population field= "run-rate" mode= "auto">
     <rule><calculated-result calculator-id= "runRate"/></rule>
</auto-population>
```

## Example: Logical & Comparison Operators

Use Case: Define the probability of success for a goal based on the percent achievement (actual/target). If % achievement is greater than 75%, then probability of success is High. If % achievement is between 45% and 75% then probability of success is Medium. Anything less than 45% is Low.

```
<calculator id="ruleCondition1"><![CDATA[(bizx_actual/bizx_target)*100 >= 75]]></
calculator>
<calculator id="ruleCondition2"><![CDATA[(bizx_actual/bizx_target)*100 < 75 &&
(bizx_actual/bizx_target)*100 >= 45]]></calculator>
<calculator id="ruleCondition3"><![CDATA[(bizx_actual/bizx_target)*100 < 45]]></
calculator>
<auto-population field="bizx-pos" mode="auto">
  <rule>
       <rule-condition calculator-id="ruleCondition1"></rule-condition>
       <calculated-result calculator-id="posHigh"/>
  </rule>
  <rule>
       <rule-condition calculator-id="ruleCondition2"></rule-condition>
       <calculated-result calculator-id="posMed"/>
  </rule>
  <rule>
      <rule-condition calculator-id="ruleCondition3"></rule-condition>
      <calculated-result calculator-id="posLow"/>
  </rule>
</auto-population>
```

## Example: Table Results

Use Case: Instead of calculating a field based on values from other fields, this use case is to populate the metric lookup table with values based on a user's selection/entry in other fields. For example, if this goal is in category "X" and the target baseline is "Y", then set MLT to "ABC".

```
<calculator id="ruleCondition1"><![CDATA[category== "Sales" && target_baseline >
500000000]]></calculator>
<calculator id="ruleCondition2"><![CDATA[category== "Sales" && target_baseline >
250000000 && target_baseline <= 500000000]]></calculator>
<auto-population field= "metric-lookup-table">
    <rule>
      <rule-condition calculator-id="ruleCondition1"></rule-condition>
      <table-result>
            <row>
         <col id="achievement">75</col>
          <col id="rating">25</col>
          <col id="description"><![CDATA[First Point]]></col>
        </row>
            <row>
          <col id="achievement">90</col>
          <col id="rating">50</col>
          <col id="description">Second Point</col>
        </row>
               <row>
          <col id="achievement">95</col>
          <col id="rating">75</col>
          <col id="description"><![CDATA[Third Point]]></col>
        </row>
               <row>
         <col id="achievement">99</col>
          <col id="rating">100</col>
          <col id="description"><![CDATA[Fourth Point]]></col>
        </row>
               <row>
         <col id="achievement">100</col>
          <col id="rating">110</col>
          <col id="description"><![CDATA[Fifth Point]]></col>
        </row>
               <row>
         <col id="achievement">110</col>
          <col id="rating">135</col>
          <col id="description"><![CDATA[Sixth Point]]></col>
        </row>
      </table-result>
     </rule>
    <rule>
        <rule-condition calculator-id= "ruleCondition2"></rule-condition>
        <table-result>
          <row>
          <col id="achievement">75</col>
           <col id="rating">25</col>
           <col id="description"><![CDATA[First Point - 2nd scale]]></col>
         </row>
        <row>
           <col id="achievement">90</col>
           <col id="rating">50</col>
           <col id="description">Second Point - 2nd scale</col>
         </row>
        <row>
           <col id="achievement">95</col>
          <col id="rating">75</col>
           <col id="description"><![CDATA[Third Point - 2nd scale]]></col>
        </row>
         <row>
           <col id="achievement">99</col>
```

```
            <col id="rating">100</col>
            <col id="description"><![CDATA[Fourth Point - 2nd scale]]></col>
          </row>
         <row>
            <col id="achievement">100</col>
           <col id="rating">110</col>
            <col id="description"><![CDATA[Fifth Point - 2nd scale]]></col>
         </row>
          <row>
            <col id= "achievement">115</col>
            <col id= "rating">135</col>
            <col id= "description"><![CDATA[Sixth Point - 2nd scale]]></col>
          </row>
         </table-result>
     </rule>
</auto-population>
```

## Related Information

Custom Calculation Example [page 159]
Custom Calculation DTD [page 152]
Calculations, Functions and Operators [page 155]
Calculating Total Score of Goal Plan or Category [page 162]
Calculating Ratings or Scores for Sub-goals [page 160]

# 7.3.1 Custom Calculation DTD

There are several elements that you can use to implement custom calculations.

The DTD Definitions for the following elements are described below:

- `<calculator>`
- `<auto-population>`
- `<rule>`
- `<rule-condition>`
- `<table-result>`
- `<calculated-result>`

For information on calculations, functions and operators that can be used with these elements, see the topic "Calculations, Functions and Operators".

### `<calculator>` DTD definition:

```
<!ELEMENT calculator (#PCDATA)>
 <!ATTLIST calculator
   id CDATA #REQUIRED
>
```

The calculator is used for both evaluating conditions (for example, "If condition = x") as well as defining the calculation result.

| Option | Description |
|---|---|
| id | Identifier for the calculation logic. Used in reference by `rule-condition` and `calculated-result`. |

Example scenario: If the rating x the weight is less than 10, then calculate the rating x weight x difficulty

```
<calculator id="lowScoreRule"> <![CDATA[rating*weight<10]]> </calculator>
<calculator id= "lowScoreCalculation"> <![CDATA[rating*weight*difficulty]]> </
calculator>
<auto-population field= "score" mode= "auto">
   <rule>
     <rule-condition calculator-id= "lowScoreRule"></rule-condition>
        <calculated-result calculator-id= "lowScoreCalculation"/>
    </rule>
</auto-population>
```

## `<auto-population>` DTD definition:

```
<!ELEMENT auto-population (rule+)>
<!ATTLIST auto-population
   field CDATA #REQUIRED
   column CDATA #IMPLIED
   mode (auto | manual) "manual"
>
```

| Option | Valid Values | Description |
|---|---|---|
| field | field-definition ids | Define the field that the system puts the calculated result into. |
| column | table-column ids | Define the table column to populate with the calculated result. |
| mode | auto | The system updates the results in real time. |
| | manual | The system displays an *update* button for the user to trigger the calculation and update of the field. |

## `<rule>` DTD definition:

```
<!ELEMENT rule (rule-condition?,(table-result|calculated-result))>
```

| Element | Description |
| --- | --- |
| rule-condition | Define a condition and when this condition is met, then one of the results (table-results or calculated results) will be applied. |
| table-result | If the rule-condition is met, or there is no rule-condition, then populate the table (defined as the field in `<auto-population>`) with values defined in this section. |
| calculated-result | If the rule-condition is met, or there is no rule-condtion, then populate the field using the calculator logic. |

## `<rule-condition>` DTD definition:

```
<!ELEMENT rule-condition (#PCDATA)> <!ATTLIST rule-condition   calculator-id CDATA
#IMPLIED >
```

> **Note**
>
> Changes to your goal plan XML
>
> The `<rule-condition>` element can be written in two ways:
>
> 1. Option with the condition in the element:
>
> ```
> <rule-condition> rating*weight>10 </rule-condition>
> ```
>
> 2. Option with the condition defined in a `<calculator>` element:
>
> ```
> <calculator id=”xx”> rating*weight>10  </calculator>
> …
> <rule-condition calculator-id=”xx”></rule-condition>
> ```
>
> If you define the condition within the element (Option1), when you export the goal plan template XML from the system it moves it to a `<calculator>` element.
>
> For example:
>
> ```
> <calculator  id="a92c6a26-a0a1-4f97-badb-79e225a2cc77"><![CDATA[]]></calculator>
> <rule>
> <rule-condition calculator-id="a92c6a26-a0a1-4f97-badb-79e225a2cc77"></rule-
> condition>
> <calculated-result calculator-id="lowScoreCalculation"/>
> </rule>
> ```
>
> The preferred method is to define a `<calculator>` and `<rule-condition>` element (Option 2).

## `<table-result>` DTD Definition:

```
<!ELEMENT table-result (row+)>
<!ELEMENT row (col+)>
```

```
<!ELEMENT col (#PCDATA)>
<!ATTLIST col
   id CDATA #REQUIRED
   lang CDATA #IMPLIED
>
```

| Element | Attribute | Description |
|---|---|---|
| row | | Container element that represents a new row in the table. |
| col | id | Used to identify the `<table-column>` id. |
| | lang | Used to specify which language locale this value represents. |

### `<calculated-result>` DTD Definition:

```
<!ELEMENT calculated-result EMPTY>
<!ATTLIST calculated-result
   calculator-id CDATA #REQUIRED
>
```

| Option | Description |
|---|---|
| calculator-id | Identifier for the `<calculator>`. |

### Related Information

Calculations, Functions and Operators [page 155]

## 7.3.2 Calculations, Functions and Operators

Various calculations, functions and operators can be used with the Custom Calculation elements

The calculations, functions and operators are grouped in the following tables:

- Arithmetic Operators
- Arithmetic Grouping
- Built in Calculated Goal Field based on Sub-goal Table values
- Built in Sub-goal Calculated Ratings
- Built in Sub-Goal Table Functions
- Built in Rounding Functions
- Built in Date Functions

- Comparision Operators
- Logical Operators

> **i Note**
>
> Features of Built in functions include:
>
> - Syntax: Built in functions are used by starting with `FUNC.` For example:
>
> ```
> FUNC.sum(milestones.rating)
> ```
>
> - Nesting: Built in functions support nesting. For example:
>
> ```
> FUNC.multiple(milestones.rating, FUNC.divide(milestones.weight, 100))
> ```

> **! Restriction**
>
> FIELD SYNTAX CHANGE REQUIRED
>
> Due to technical limitations, when field ids are used you must replace a dash "-" with an underscore "_". For example, target_baseline > 250 (the field id is "target-baseline").

Arithmetic Operators

Can be used in both `<rule-condition>` and `<calculator>`.

| Operator | Description |
|---|---|
| + | Sum |
| - | Difference |
| * | Product |
| / | Quotient |

Arithmetic Grouping

Can be used in both `<rule-condition>` and `<calculator>`.

| Grouping | Description |
|---|---|
| ( ) | Open and close parentheses to group expressions |

Built in Calculated Goal Field based on Sub-goal Table values

Can be used in both `<rule-condition>` and `<calculator>`.

| Function | Description |
|---|---|
| sum(column) | Add up values from one column in a sub-goal table (tasks/targets/milestones). The result are stored as a goal level field. For example, `FUNC.sum(milestones.rating)` |
| avg(column) | Average values from one column in a sub-goal table (tasks/targets/milestones). The result are stored as a goal level field. For example, `FUNC.avg(milestones.weight)` |

Built in Sub-goal Calculated Ratings

Can be used in both `<rule-condition>` and `<calculator>`.

| Function | Description |
|---|---|
| gm_sub_goal_rating_of_milestones | Calculate rating in milestone table using min/target/max |
| gm_sub_goal_rating_of_targets | Calculate rating in target table using min/target/max |
| gm_sub_goal_rating_of_tasks | Calculate rating in task table using min/target/max |

```
<calculator id="milestoneRollup">
     <![CDATA[FUNC.sum(milestones.score)]]>
</calculator>
<calculator id="subGoalWeightedScore">
     <![CDATA[FUNC.multiple(milestones.rating, FUNC.divide(milestones.weight,
100))]]>
</calculator>
<auto-population field="actual-achievement" mode= "auto">
     <rule><calculated-result calculator-id="milestoneRollup"/></rule>
</auto-population>
<auto-population field="milestones" column="rating" mode="auto">
    <rule><calculated-result calculator-id="GM_SUB_GOAL_RATING_OF_MILESTONES"/></
rule>
</auto-population>
<auto-population field="milestones" column="score" mode="auto">
     <rule><calculated-result calculator-id="subGoalWeightedScore"/></rule>
</auto-population>
```

Built in Sub-Goal Table Functions

Can be used in both `<rule-condition>` and `<calculator>`.

| Function | Description |
|---|---|
| add(column1, column2) | For each row in a sub-goal table, add values from two columns into a third column. The result is a column in a sub-goal row. For example, `FUNC.add(task.actual, task.target)` |
| add(column1, number) | For each row in a sub-goal table, add a constant value (number) to a column and return the new value to a third column. The result is a column in a sub-goal row. For example, `FUNC.add(task.actual, 100)` |
| subtract(column1, column2) | For each row in a sub-goal table, subtract values from two columns (column1 - column2) into a third column. The result is a column in a sub-goal row. For example, `FUNC.subtract(task.actual, task.target)` |
| subtract(column1, number) | For each row in a sub-goal table, subtract a constant value (number) from a column and return the new value to a third column. The result is a column in a sub-goal row. For example,`FUNC.subtract(task.actual, 100)` |
| multiple(column1, column2) | For each row in a sub-goal table, multiply values from two columns into a third column. The result is a column in a sub-goal row. For example, `FUNC.multiple(task.actual, task.target)` |
| multiple(column1, number) | For each row in a sub-goal table, multiply a constant value (number) by a column and return the new value to a third column. The result is a column in a sub-goal row. For example, `FUNC.multiple(task.actual, 100)` |

| Function | Description |
|---|---|
| divide(column1, column2) | For each row in a sub-goal table, divide values from two columns (column1/column2) into a third column. The result is a column in a sub-goal row. For example, `FUNC.divide(task.actual, task.target)` |
| divide(column1, number) | For each row in a sub-goal table, divide a column by a constant value (number) and return the new value to a third column. The result is a column in a sub-goal row. For example, `FUNC.divide(task.actual, 100)` |

Built in Rounding Functions

Can be used in both `<rule-condition>` and `<calculator>`.

| Function | Description |
|---|---|
| round (number) | Returns the closest long. For example, `round(1.4)=1`, `round(1.5)=2`<br><br>→ Tip<br><br>Define Rounding Precision:<br><br>If you want to configure a rounding of 2 decimal places, use this: `round(1.234*100)/100=1.23`. For 1 decimal place: `round(1.234*10)/10=1.2`, and so on. |
| ceil(number) | Returns the smallest double value that is greater than or equal to the number. For example, `ceil(1.2)=2` |
| floor(number) | Returns the largest double value that is less than or equal to the number. For example, `floor(1.9)=1` |

Built in Date Functions

Can be used in both `<rule-condition>` and `<calculator>`.

| Function | Description |
|---|---|
| diff(Date1, Date2) | Calculates the difference between two dates (Date1 - Date2) represented in days |
| diff(Date1, Date2, Unit) | Calculates the difference between two dates (Date1 - Date2) represented in defined Unit (MILLISECOND/SECOND/MINUTE/HOUR/DAY/WEEK/MONTH/QUARTER/YEAR) |
| NOW | Returns the current server time. For example, diff(NOW, d1) equals days from d1 to NOW. |

Comparision Operators

Can only be used in `<rule-condition>`.

| Operator | Description |
|---|---|
| == | Equals |
| != | Does not equal |

| Operator | Description |
|---|---|
| > | Greater than |
| = | Greater than or equal to |
| < | Less than |
| <= | Less than or equal to |

Logical Operators

Can only be used in <rule-condition>.

| Operator | Description |
|---|---|
| && | And |
| \|\| | Or |
| ! | Not |

## 7.3.3 Custom Calculation Example

A simple custom calculation example is provided to help you get started.

### Context

Business Request: As a user, you would like to display goal scores in your goal plan.

> **i Note**
>
> Configure Assumption: Goal Score is Rating x Weight. In this example, we are using the standard field ids <weight> and <rating>.

### Procedure

1. Define a new field. This includes the field definition, permissions, column and form layout, and so on.

   > **i Note**
   >
   > Standard Field: Use the standard field id <goal-score> if you want to have the goal score roll up to goal plan or category level totals.

   ```
   <field-definition id="goal-score" type= "number" required= "false " detail=
   "false " viewdefault= "off" showlabel= "true " field-show-coaching-advisor=
   "false " cascade-update= "regular">
          <field-label>Score</field-label>
          <field-description>Goal Score</field-description>
   ```

```
        < default-value>0.0</default-value>
        <field-format>#.#</field-format>
</field-definition>
```

2. Define the calculation logic for the goal score field.

   Use the code below to create a calculation called “goalScore” that takes `<weight>`, divides it by 100 and then multiplies the result by the `<rating>`:

```
<calculator id="goalScore">
    <![CDATA[(weight/100)*rating]]>
</calculator>
```

3. Map the calculator to the field.

   Use the code below to populate the `<goal-score>` field with the calculator “goalScore”:

```
<auto-population field="goal-score" mode= "auto">
     <rule><calculated-result calculator-id= "goalScore"/></rule>
</auto-population>
```

## 7.3.4 Calculating Ratings or Scores for Sub-goals

You can calculate raitings or total scores for sub-goals of a goal plan. Here are the steps and XML to achieve a sub-goal calculated rating.

### Context

Use Case: Support for calculated ratings at the sub-goal (milestone, target, task) level.

- Calculated sub-goal rating
- Calculate sub-goal score (rating x weight)
- Roll up sub-goal scores to the goal level rating

For information on the built in function for calculated sub-goal rating, see the topic “Calculations, Functions and Operators”.

### Procedure

1. Define achievement thresholds for min, target, max.
2. Define a table level min/target/max. This is required so that sub-goal ratings can support different min/ target/max and the overall rating can be normalized.
3. Enter in an actual achievement and the system calculates an interpolated rating for that sub-goal row (displayed as the normalized rating).

## Results

Required XML code:

```
<field-definition>
    <field-label>Subobjectives</field-label>
    <table-row-label>Subobjectives</table-row-label>
    <table-column id="desc" type="text" required="false" cascade-update="push-down">
        <column-label>Subobjective Name</column-label>
        <column-description>Subobjective Name</column-description>
    </table-column>
    <table-column id="weight" type="percent" required="false" cascade-update="push-
down">
        <column-label>Weight</column-label>
         <column-description>Weight</column-description>
    </table-column>
    <table-column id="customNum1" type="number" required="false" cascade-
update="push-down" >
         <column-label>Minimum</column-label>
        <column-description>Minimum</column-description>
         <rating-value>1</rating-value>
    </table-column>
    <table-column id="customNum2" type="number" required="false" cascade-
update="push-down">
        <column-label>Target</column-label>
         <column-description>Target</column-description>
        <rating-value>100</rating-value>
    </table-column>
     <table-column id="customNum3" type="number" required="false" cascade-
update="push-down">
         <column-label>Maximum</column-label>
        <column-description>Maximum</column-description>
         <rating-value>250</rating-value>
    </table-column>
    <table-column id="actualNumber" type="number" required="false" cascade-
update="push-down">
        <column-label>Result</column-label>
         <column-description>Result</column-description>
    </table-column>
    <table-column id="rating" type="number" required="false" cascade-update= "push-
down" width= "4">
        <column-label>Score</column-label>
        <column-description>Score</column-description>
     </table-column>
    <table-column id="score" type="number" required="false" cascade-update="push-
down" width= "4">
        <column-label>Weighted Score</column-label>
    <column-description>Weighted Score</column-description>
    </table-column>
</field-definition>
```

## Related Information

Calculations, Functions and Operators [page 155]

## 7.3.5 Calculating Total Score of Goal Plan or Category

You can calculate the total score of a goal plan or just a catergory by using the `show-total-goalscore` attribute. This feature is related to the calculated fields but is specific to displaying total scores.

### Context

The use case is to display a goal plan total goal score (rating x weight summed up for all goals).

### Procedure

1. Configure the standard field "goal-score".
   You can use calculator and auto population to generate goal score to be rating x weight.
2. There is an attribute for `<obj-plan-template>` show-total-goalscore="true".
3. The same attribute can be applied to the `<category>` element show-total-goalscore="true".

### Results

Formatting Total Score:

The goal plan and category total score values respect the `<field-format>` element of the "goal-score" field.

## 7.3.6 Sub-goal Auto-population Rules

The sub-goals can be configured with one of the two calculation types, per column or per row.

When you do calculation for sub-goals, you can use either `calc-type="col"` or `calc-type="row"`. For example, you want to auto-populate the score column in this table.

| milestones | due | target | achievement | score |
|---|---|---|---|---|
| milestone 1 | 2012-03-14 | 100 | 10 | |
| milestone 2 | 2012-06-19 | 150 | 150 | |
| milestone 3 | 2012-09-14 | 200 | 300 | |

If all the scores in the table are calculated with the same rule, for example, calculate score=achievement/target*100%, you should use `calc-type="col"`.

Sample Code

```
<calculator id="c1">
    <![CDATA[FUNC.divide(milestones.achievement,milestones.target)]]>
</calculator>
<auto-population field="milestones" column="score" mode="auto" calc-type="col">
    <rule>
        <calculated-result calculator-id="c1"/>
    </rule>
</auto-population>
```

Note

The default calculation type is per column. The `calc-type="col"` code can be omitted without impacting calculation results.

If you want to apply conditional rules, for example, if you want to apply different calculation rules depending on whether it is due or not, you should use `calc-type="row"`.

Sample Code

```
if (due>=now){
score=achievement/target*100%  // if it's not due yet, take normal calculation
} else {
score=achievement/target*0.5*100%  // if it's due, half the score
}
```

If now=2012-07-01, with the above conditional rules, you must use the calculation type of per row as below.

Sample Code

```
<calculator id="a1">
    <![CDATA[diff(milestones.due, now)>=0]]>
</calculator>
<calculator id="a2">
    <![CDATA[milestones.achievement/milestones.target*100%]]>
</calculator>
<calculator id="b1">
    <![CDATA[diff(milestones.due, now)<0]]>
</calculator>
<calculator id="b2">
    <![CDATA[milestones.achievement/milestones.target*0.5*100%]]>
</calculator>
<auto-population field="milestones" column="score" mode="auto" calc-type="row">
    <rule>
        <rule-condition calculator-id="a1"/>
        <calculated-result calculator-id="a2"/>
    </rule>
    <rule>
        <rule-condition calculator-id="b1"/>
        <calculated-result calculator-id="b2"/>
    </rule>
</auto-population>
```

With this configuration, system calculate according to each row. The `milestones.target` represents only one number.

For row 1, milestones.target=100, and the final score is 0.05 (applies b2).

For row 2, milestones.target=150, and the final score is 0.5 (applies b2).

For row 3, milestones.target=200, and the final score is 1.5 (applies a2).

# 8 Configuring Email Notifications

Walk you through email notification configurations you're able to set for your goals.



## 8.1 Email Notification Types

You can configure email notifications so that the target recipients can receive notifications when a goal is created, deleted, modified, or commented upon. There are four types of email notifications:

- **Goal Creation Notification**: alerts a user when a goal is created for him or her.
- **Goal Delete Notification**: alerts the goal owner when the goal is deleted by another user from the goal plan.
- **Goal Modification Notification (daily)**: alerts a user with a message sent on a 24-hour basis when a change is made to public goals on his or her goal plan. The message can include information about created, modified, and deleted goals but excludes feedback or comments. Furthermore, users are not notified of changes they made themselves. The valid token for this message is `[[LAST_EMAIL_DATE]] [[GOAL_OWNER]] [[OBJ-PLAN-NAME]] [[OBJ_LIST]] [[SIGNATURE]]`.

> → Remember
>
> To use the **Goal Modification Notification** email notification, you must have an *Objective notification email* type of a scheduled job created in Provisioning as explained in Creating a Scheduled Job for Using Goal Modification Notifications [page 167].

> i Note
>
> In the case of copying an existing goal from a goal plan to another goal plan, two email notifications are sent. One Goal Modification Notification is sent for the goal plan **from** which the goal is copied. The other Goal Modification Notification is sent for the goal plan **to** which the goal is copied.

- **Goal Comment Notification**: alerts an employee and the employee's line manager about comments added to the employee's goal plan. The message includes `[[OBJ_RECIPIENT]]`, `[[OBJ_SENDER]]`, `[[OBJ_NAME]]`, `[[OBJ-PLAN-NAME]]`, `[[OBJ_COMMENT]]`, and `[[OBJ_COMMENT_HERE]]`. This type of email notification works in the following occasions:
  - When a line manager provides feedback on the goal plan of an employee, the employee receives the email notification.
  - When an employee adds a comment to the goal plan, as a response to the feedback of the line manager, the manager receives the email notification.
  - When someone, other than the employee or the line manager (for example, a matrix manager), provides feedback on the goal plan of the employee, both the employee and the manager receive the email notification.

  > → Remember
  >
  > Make sure that the corresponding email template is configured properly. Otherwise, users might encounter error when adding comments to goal plans. In the email template, you can include the comment token to allow the recipients of the email notification to read the comment directly in the email. However, this functionality might create a conflict with your data protection and privacy compliance. If you configure the email notification template to include `[[OBJ_COMMENT]]`, the comment effectively lives outside of SAP SuccessFactors once the email is sent, and it cannot be purged using the data purge options in the application.

> i Note
>
> Employees need the Private Access permission to receive email notifications for private goals.

## 8.2 Enabling Email Notifications for Goal Management

To enable email notifications for goal management, you need to configure both in Admin Center and Provisioning. In Admin Center, you can select desired goal email notification types and customize your email notification templates.

### Context

Goal email notifications can be enabled and disabled in Admin Center. When any email notification type is enabled, users will receive a notification when the related actions occur. For example, if Goal Comment Notification is enabled, when an employee adds feedback to a goal plan, the employee's line manager will receive a notification.

### Procedure

1. Go to *Admin Center* > *Company Settings* > *E-Mail Notification Templates Settings*.

2. Select types of goal email notifications that you want to enable for your instance:
   For details about email notification types, see Email Notification Types [page 165].
3. Click *Save Notification Settings*.

## Results

You have enabled email notifications for goal management.

## Next Steps

You can further customize templates for goal email notification messages through *E-Mail Notification Template* in Admin Center.

# 8.3 Creating a Scheduled Job for Using Goal Modification Notifications

You must create "Goal notification email" type of scheduled job to be able to use the "Goal Modification Notification" e-mail notifications in Goals Management.

## Context

Even if you enable the "Goal Modification Notification" e-mail notifications, using the *Admin Center* > *E-Mail Notification Templates Settings* tool, the e-mail notifications will not be sent until you have a "Goal notification email" type of scheduled job created using the *Manage Scheduled Jobs* tool in Provisioning.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

## Procedure

1. Log in to Provisioning.
2. In the *Managing Job Scheduler* section, click *Manage Scheduled Jobs*. The *Manage Scheduled Jobs* page appears.

3. Click the *Create New Job* link. The *Create New Job* page appears.
4. Enter a relevant *Job Name*. For example, enter "Scheduled Job for Goal Notification Email".
5. In *Job Owner*, select an admin user responsible for managing the e-mail template notifications.
6. In *Job Type*, select *Goal notification email* from the dropdown.
7. For *Job Parameters*, select *Today*.

> **i Note**
>
> Do not select a date range as *Job Parameters*, as it can interfere with the delivery of notifications, and might cause sending of erroneous notifications to users.

8. In *Occurrence*, select *Recurring* to ensure that the Goal email notification is sent out regularly.
9. In the *Recurring Pattern* section, select *Daily*, and select 18:00 hours as the scheduled time for executing the job.

> **i Note**
>
> When you select *Daily* as your recurring pattern with *Today* as the job parameter, the preferred time for the scheduled job should be on or after 1800 hours, so that all the goal changes for the day are covered in the e-mail notification. The Goal email notification captures only the changes between 0 a.m. and the time that you have selected. For example, if you select 0 a.m., no changes will be captured.

10. In *Start Date*, enter the starting date in the `<MM/DD/YYYY>` format and select a time for this scheduled job.

> **i Note**
>
> You must NOT enter a date and time, earlier than your current date and time.

11. Select the *Send E-mail when job starts* check box.
12. Click *Create Job*. The newly created scheduled job appears in the list of jobs on the *Manage Scheduled Jobs* page.
13. For your newly created scheduled job, under *Actions*, select *Submit*.

## Results

You have successfully scheduled a job for the goal email notifications. This ensures the **Goal Modification Notification** e-mail notifications will be sent if you enabled the e-mail notification using the *Admin Center* > *E-Mail Notification Templates Settings* tool.

## 8.4 Customizing Goal Modification Notifications

Customize email notifications of goal modification in Admin Center to meet your needs and preferences.

### Prerequisites

You have an *Objective notification email* type of a scheduled job created in Provisioning as explained in Creating a Scheduled Job for Using Goal Modification Notifications [page 167].

### Context

A goal modification notification is triggered when a public goal is created, modified, or deleted. Email notifications of goal modification are sent every 24 hours to the employee and to the manager, if changes were made to public goals on the employee's goal plan. Users are **not** notified of changes that they made themselves.

### Procedure

1. Go to *Admin Center* > *E-Mail Notification Templates Settings*.
2. Choose *Goal Modification Notification (daily)* and configure the following settings as needed:

| Settings | Description |
| --- | --- |
| Set Email Priority | You can set *High Priority* for the Goal Modification Notification. |
| Customize Settings for Goal Plans | You can select goal plans from the list through the link. |
| Do not send notifications for:<br>• Actions to linked Goals<br>• Unlinking a Goal<br>• Actions to cascaded Goals | You can exclude Goal Modification Notification for these three conditions.<br>**Note**<br>Choosing *Actions to cascaded Goals* also disables email notifications related to updates for Group Goals 2.0 push down fields. |

| Settings | Description |
|---|---|
| Send notification for: | If *Private in addition to public goal* is enabled and the user has permission to access the private goals, notifications are sent.<br><br>If the latest Goal Management is enabled, the *Changes to goal plan state* setting is available. If this setting is enabled, employees and employees' managers (EM) who have the `change-state` permission, excluding action takers themselves, receive notifications of who changes the goal plan state and what the current goal plan state is. |
| Allow notification to:<br>• Exclude "user deletions" to goals<br>• Include a manager's matrix report(s)<br>• Consolidate by employee | If *Exclude "user deletions" to goals* is enabled, the goal modification notification doesn't have any deletion information of the goals. |
| | If *Include a manager's matrix report(s)* is enabled, the manager receives the notification about the goals of the matrix reports. |
| | If *Consolidate by employee* is enabled, the manager receives only one notification that consolidates all the notifications of the same goal plan of the employees. |

## 8.5 Adding or Removing Goal Links in Email Notifications

You can add or remove a goal plan link in the footer of an email notification.

### Context

To enable a link of the goal plan in the email notification, you must enable both *Consolidate by employee* and *Enable HTML email notifications* in *Admin Center*. To remove the link from the email notification, you can simply disable either of the proceeding options.

### Procedure

1. Go to *Admin Center* > *Company Settings* > *E-Mail Notification Templates Settings* > *Goal Modification Notification (daily)*.
2. Select *Consolidate by employee*.
3. Click *Save Notification Settings*.
4. Go to *Admin Center* > *Company Settings* > *Company System and Logo Settings*.
5. Select *Enable HTML email notifications*.

6. Click *Save Company System Setting*.

## Results

You have enabled a direct goal plan link in the goal email notifications.

# 9 Configuring Goal Notifications of To-Do Items

Enable or disable Goal notifications of to-do items in Admin Center.

## Prerequisites

SAP SuccessFactors Employee Central is turned on in Provisioning.

## Procedure

1. Go to *Admin Center* > *Company Settings* > *Notification Configuration*.
2. Select the *Goals Management* module from the dropdown list of *All Modules*.

   You can see a list of Goal Management related notifications of to-do items.
3. Select *On* or *Off* to respectively enable or disable notifications of to-do items.

   > **Note**
   >
   > Disabling notifications only stops the display of future to-do items. Existing to-do items are not affected.
4. Save your changes.

## Related Information

Goal Notifications of To-Do Items [page 172]

# 9.1 Goal Notifications of To-Do Items

Events that occur in SAP SuccessFactors Employee Central can trigger Goal Management to-do items. For example, when a new manager is created in Employee Central, the Goal Management module automatically triggers a to-do item for the manager, asking the manager to review the goal plan of the new team.

Events in Employee Central that can trigger notifications include department change, division change, and first time manager. Here is a list of Goal Management related notifications.

- User department change notification: Department changed
- User division change notification: Division changed
- First time manager notification: Review team's goal plans
- Individual contributor notification: Review team's goal plans
- User Job title change notification: Job title changed
- User LTD notification: Long term disability of manager
- User LTD notification: Long term disability of user
- Manager LOA notification: Leave of absence review
- User LOA notification: Leave of absence review
- Manager change notification: Review team's goal plans
- Manager new hire notification: New employee hired
- User STD notification: Long term disability of manager
- User STD notification: Short term disability of user

# 10 Integrating with Other SAP SuccessFactors Modules

Learn about integrating Goal Management with other SAP SuccessFactors modules, such as Performance Management, Continuous Performance Management, and the Home page.



## 10.1 Integrating with Performance Management

Goals entered into Goal Management can be auto-populated onto a Performance Management form. Goals can also be auto-synchronized between a goal plan and a form.

> **i Note**
>
> If you use the latest Goal Management and you enabled the auto-sync feature in Performance Management, please be aware of the following:
>
> - Users can delete a goal on a Performance Management form only when they have the *User Permissions* > *Objectives* > *Objective Plan Permissions* role-based permission to the goal plan of that goal. The goal deleted from the form will also be deleted from the goal plan.
> - Users without the permission can't see the button to delete the goal on the form.

Typically, customers purchase both Goal Management and Performance Management, although Goals in Goal Management can be used on a stand-alone basis. To integrate Goal Management with Performance Management, you must have implemented and configured Performance Management.

### Related Information

Overview of Performance Management

## 10.2 Integrating with Continuous Performance Management

You can view the Continuous Performance Achievements, along with their feedback, directly on the *Goal Plan* page.

### Prerequisites

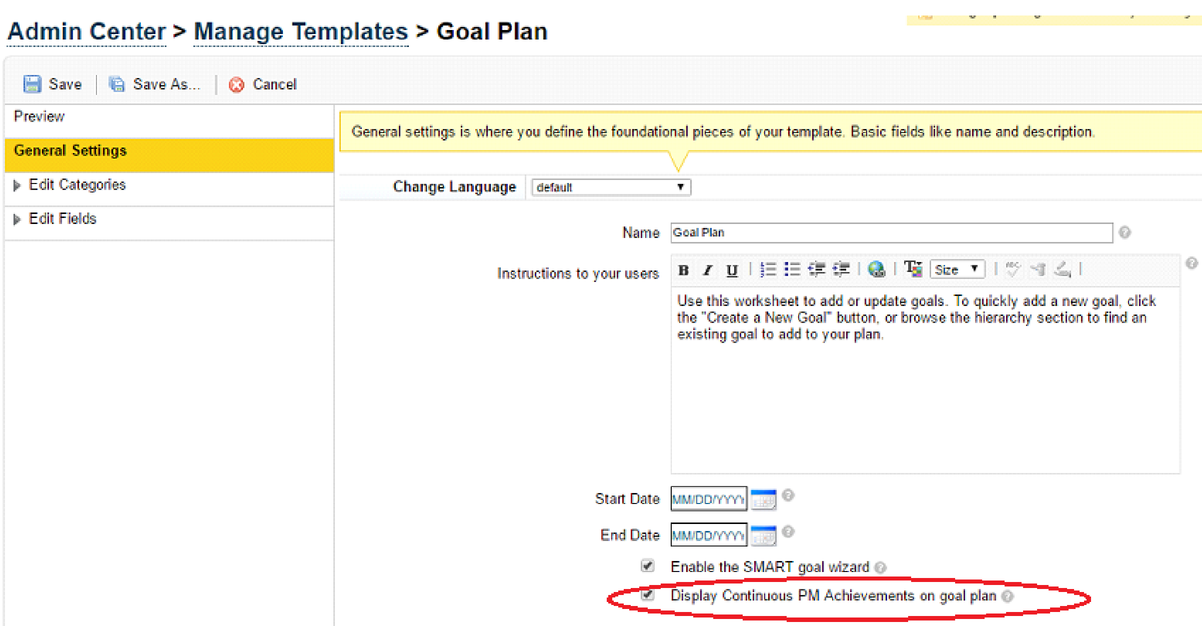
- Continuous Performance Management must be enabled in your SAP SuccessFactors instance.
- You have the *User* > *Continuous Performance User Permission* > *Access to Continuous Performance Management* permission.

### Context

> **Note**
>
> This is an SAP SuccessFactors Business Beyond Bias feature. Use it to support processes that detect, prevent, or eliminate the influence of bias, helping you achieve your diversity and inclusion goals.

### Procedure

1. Go to *Admin Center* > *Manage Templates* .
2. Choose *Goal Plan* tab, and then open the goal plan template in which you want to include the Achievements.
3. Choose *General Settings*, and then select *Display Continuous PM Achievements on goal plan*.



4. Save your changes.

### Results

The *CPM Achievements* column is available on the *Goal Plan* page.

> **Note**
>
> The number of Continuous Performance Achievements linked with each goal appears in the *CPM Achievements* column on the *Goal Plan* page. When you choose the count under the *CPM Achievements* column, a pop-up window lists out the details of the linked achievements, along with the feedback comments received on the achievements. Please note that you can search for the linked achievements only by their title, not by any other metadata.

## 10.3 Integrating with Multiple Employment

Goal Management allows employees on global assignments or concurrent employment to switch between the goal plans for each employment.

### Related Information

Global Assignments Overview
Concurrent Employment
Impact of Multiple Employment on Goal Management

## 10.4 Integrating with the Home Page

You can view goals on the latest home page.

Goal Management on the Latest Home Page [page 177]
Goal Management is part of SAP SuccessFactors Performance & Goals. Learn about Goal Management features on the latest home page.

Important Notes About Goal Management on the Latest Home Page [page 181]
Understand the current scope and design of Goal Management on the latest home page before you enable it.

**Related Information**

Latest Home Page

## 10.4.1 Goal Management on the Latest Home Page

Goal Management is part of SAP SuccessFactors Performance & Goals. Learn about Goal Management features on the latest home page.

> **Note**
>
> You can view and act on your personal goals on the latest home page, no matter if the goals are created through **legacy** or **latest** Goal Management.

| Name | Description | Where Shown | When Shown | Prerequisites | On Mobile? |
|---|---|---|---|---|---|
| *My Goals* | Takes you to the Goals page so you can view and edit your goals. | *Quick Actions* | Always shown, based on system configuration and user permission. | • It's selected at *Manage Home Page* > *Quick Actions*.<br>• *Enable Goal Management Access Permission* is enabled at *Admin Center* > *Goal Management Feature Settings*.<br>• *Total Goal Management* is enabled in Provisioning.<br><br>→ Remember<br><br>As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support. | No |

| Name | Description | Where Shown | When Shown | Prerequisites | On Mobile? |
|---|---|---|---|---|---|
| | | | | • If you're using legacy Goal Management<br>  • You have the *User Permissions* > *Goals* > *Goal Management Access* permission.<br>• If you're using latest Goal Management<br>  • You have the *User Permissions* > *Goals* > *Goal Management Access* permission.<br>  • You have the *User Permissions* > *Career Development Planning* > *Career Development Plan (CDP) Access Permission* permission. | |

| Name | Description | Where Shown | When Shown | Prerequisites | On Mobile? |
|---|---|---|---|---|---|
| *Goals* | Displays performance and development goals that are due soon or overdue and not set to “Complete”.<br><br>→ Remember<br><br>For users to properly mark their goals as complete, the last enum value for the `state` field in the goal plan template should be set to `complete`. This is because the last enum value triggers the `complete` state of a goal. | *For You Today* | Personal goals appear when their state is **not** yet complete and they meet one of the following conditions:<br>• (For performance goals only) 15 days before the due dates<br>• (For development goals only) 30 days before the due dates<br>• Overdue<br><br>i Note<br><br>The due dates are based on the goal owner's timezone regardless of the login user's location. Make sure that the due date of a goal is no later than the due date defined in the `<obj-plan-due>` element of the goal plan template.<br><br>Personal goals disappear when one of the following conditions is met:<br>• Goals are marked as complete.<br>• Goals are deleted. | • It's enabled at *Manage Home Page Card Settings*.<br>• *Enable Goal Management Access Permission* is enabled at *Admin Center* > *Goal Management Feature Settings*.<br>• *Total Goal Management* is enabled in Provisioning.<br><br>→ Remember<br><br>As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support. | Yes |

| Name | Description | Where Shown | When Shown | Prerequisites | On Mobile? |
|---|---|---|---|---|---|
| | | | • Goals are more than 365 days overdue but not yet complete. | • You have the *User Permissions* > *Goals* > *Goal Plan Permissions* permission to the goal plan template where the goal is created.<br>• You have read permission to the goal `name` and `due` fields in the goal plan template.<br>• You have write permission to the `state` field in the goal plan template. | |

## Related Information

Important Notes About Goal Management on the Latest Home Page

# 10.4.2 Important Notes About Goal Management on the Latest Home Page

Understand the current scope and design of Goal Management on the latest home page before you enable it.

- Only personal goals are shown on the latest home page. Group or team goals are not yet supported.
- You can enable or disable generation of home page cards. For more details, see *Disabling and Enabling Home Page Cards*.
  After you switch off the toggle, it might take up to 1 hour for the change to take effect. During this time, cards might still be generated.
- For users to properly mark their goals as complete, the last enum value for the `state` field in the goal plan template should be set to `complete`. This is because the last enum value triggers the `complete` state of a goal.
- For a goal created through legacy Goal Management, users can mark it as complete only when the maximum length of goal fields is not exceeded. Otherwise, an error is reported.
- When users work with a latest Goal Management plus latest home page system, the *Mark as Complete* function doesn't work for existing goals that are created in legacy Goal Management.

**Cause:** After you upgrade to the latest Goal Management, existing goal plan templates and the related goal data throughout all supported modules are available to users in the read-only mode.
**Workaround:** Convert the existing goal plan template. For details, see *Converting Existing Goal Plan Templates*.

- In the *For You Today* section, when users choose *View All* on a goal card stack, a maximum of 20 goal cards are displayed. If they have more than 20 goal cards, the remaining will be displayed only after they choose *Mark as Complete* or *Dismiss* on existing goal cards.

## Related Information

Goal Management on the Latest Home Page [page 177]
Converting Existing Goal Plan Templates [page 195]
Disabling and Enabling Home Page Cards

# 11 Working with the Latest Goal Management

Learn about the setup and configuration of the latest Goal Management.

> ⚠ Caution
>
> Upgrading to the latest Goal Management **cannot** be undone. You **cannot** revert back to an older version. The legacy and latest versions of Goal Management don't support exactly the same features. Features you use in legacy Goal Management are **not** necessarily supported in the latest Goal Management. Make sure you have reviewed the feature limitations before the upgrade.

Overview of the Latest Goal Management [page 184]
The latest version of Goal Management, consisting of performance goals and development goals, provides a new experience to set up, track, distribute, and manage goals in your organization.

Reduced Scope of the Latest Goal Management [page 187]
Learn about the reduced scope of the latest Goal Management before you enable it.

Changes to Goal Plan Templates [page 188]
To offer end users more flexibility and provide better visual appearance on the UI, we've simplified configurations and set new validations in goal plan templates of the latest Goal Management.

Enabling the Latest Goal Management [page 194]
To use the latest Goal Management, enable it in the Upgrade Center.

Converting Existing Goal Plan Templates [page 195]
Convert your existing goal plan templates so that you can use and edit your templates and the related goal data in the latest Goal Management. Template conversion is mandatory for integration with Continuous Performance Management, Onboarding 1.0, Onboarding 2.0, Performance Management forms, and 360 Reviews forms

Team Goals in the Latest Goal Management [page 196]
Learn about the preparations you need to make to enable users to properly work with latest team goals.

## Related Information

Frequently Asked Questions for Latest Goal Management

## 11.1 Overview of the Latest Goal Management

The latest version of Goal Management, consisting of performance goals and development goals, provides a new experience to set up, track, distribute, and manage goals in your organization.

### Benefits of the Latest Goal Management

Managers and employees benefit from the latest Goal Management in the following scenarios:

- Upgraded user interfaces allow employees to more effectively set up and manage their goals and view their activities.
- A unified entrance to Performance Goal and Development Goal enables seamless navigation.
  To use Development Goal in the latest Goal Management, the SAP SuccessFactors Succession & Development license and feature enablement in Provisioning are still required. If you've enabled the latest Goal Management, access to Development Plan is removed from Career Development Planning and integrated into the latest Goal Management.
- Uncluttered goal list views make it easy to spot critical information, glean insights, and apply quick changes.
- The integration with Continuous Performance Management helps managers and employees explore relationships between activities and goals in a broader perspective.

### Supported Features

If the feature is **not** listed, it is **not** supported in the latest Goal Management.

> → Recommendation
>
> We recommend that you **not** use Microsoft Internet Explorer to access the latest Goal Management because some features might not work properly in this browser.

#### For End-Users

Users can do the following in the latest Goal Management:

- Create personal goals
  Make sure that users have the *User Permissions* > *Goals* > *Goal Plan Permissions* permission.
- (For performance goals only) Create personal goals by selecting and editing goals from a goal library
  Make sure the following prerequisites are met:
  - A goal library is linked to the goal plan.
  - Goal library files configured in the languages of users are imported.
  - Users have the *User Permissions* > *Goals* > *Goal Plan Permissions* permission.

  > i Note
  >
  > In the latest Goal Management, if users don't have the permission to edit a field of a library goal, they won't see the field's initial value. In the legacy Goal Management, they can see the initial value.

- (For performance goals only) Cascade personal goals regardless of reporting lines
  We recommend cascading goals one by one.
- Edit, view, and delete all goals except group goals v1
- Change goal plan states in Goals
  Changing goal plan states on Performance Management form is still supported.
- Receive goal notifications, including notifications of changes to goal plan states
- (For development goals only) Add learning activities and competencies to goals

> **Note**
>
> Competencies are available only when Job Profile Builder is enabled.

- Create and view activities between direct manager and employees through the latest Continuous Performance Management, and view linked achievements
  Standalone achievements can't be displayed.
- View goals on the latest home page
- View other people's goals
  If users want to view other people's job titles or photos, make sure that users have the *View* permission for these employee data under *User Permissions* > *Employee Data*.
- Search for people by names in *People Selector*
  Make sure that users have the *User Permissions* > *General User Permissions* > *User Search* permission.
- (For performance goals only) Search for people by advanced criteria to cascade personal goals or assign team goals
  Make sure that *Enable Solr People Search (requires Role-based Permission)* is enabled in Provisioning.

  > **Remember**
  >
  > As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

  Make sure that users have the following role-based permissions:
  - *User Permissions* > *General User Permissions* > *User Search*
  - For search criteria permissions, refer to *Configuring Search Criteria for People Search* in the Related Information section.
  - For search results permissions, refer to *Configuring Role-Based Permissions to Allow Logged In User to View Certain Employee Information in People Search Results* in the Related Information section.

  > **Note**
  >
  > Goal Management doesn't support the permission validation for the search criterion *User Role*. If a user uses this search criterion when cascading goals, people who don't have permission to receive the goals will probably appear in the search results. To avoid such case, we recommend that users not use this search criterion.

  Please note that Goal Management doesn't support the permission validation for the search criterion *User Role*. If a user uses this search criterion when cascading goals, people who don't have permission to receive the goals will probably appear in the search results. To avoid such case, we recommend that users not use this search criterion.

- (For performance goals only) Create, edit, delete, assign, unassign, and share ownership of team goals
- Add, edit, and delete threaded comments on goals
- Copy personal goals from goal plans
- (For performance goals only) Automatic population and calculations
- View the audit history of goals
- Manage milestones for goals
- Legal Scan

### For Administrators

As an administrator for the latest Goal Management, you can do the following:

- Import personal or team goals through Admin Center
  Features supported in this function are limited to the supported features of the latest Goal Management.

  > **i Note**
  >
  > You can see and check *Yes* for the *Read-only goals* option in *Admin Center* > *Import Goals*, but the action you take on this option won't take effect because the function is currently not supported.

- Import goal library files
- Manage templates
- (For performance goals only) Transfer goals between users
- Configure email notifications

### Integrations with Other Modules

- Integration with Objectives and Key Results (OKR) for Dynamic Teams
- Upon template conversion, integration between the latest Goal Management and other modules is supported the same way it is supported in legacy Goal Management.

> **i Note**
>
> - The way that fields are displayed might differ between Goals and other modules due to delays in adopting the latest Goal Management.
> - For the integration with Performance Management forms and 360 Reviews forms, no teams goals are shown for selection when users attempt to sync goals through the *Add Goal* > *From Goal Plan* button. Currently, this option works only when the goals to be synced are merely personal goals.
> - For the integration with Continuous Performance Management:
>   - The latest Goal Management can be integrated with only the latest Continuous Performance Management.
>   - Only the role-based permission *User Permissions* > *Continuous Performance User Permission* > *Access to Continuous Performance Management* is required. The setting *Display Continuous PM Achievements on goal plan* in *Manage Templates* is no longer required.

## Related Information

Linking Development Goals to Competencies

Important Notes About Goal Management on the Latest Home Page [page 181]
Integrating Dynamic Teams with Goal Management
Configuring Search Criteria for People Search
Configuring Role-Based Permissions to Allow Logged In User to View Certain Employee Information in People Search Results

## 11.2 Reduced Scope of the Latest Goal Management

Learn about the reduced scope of the latest Goal Management before you enable it.

A goal plan contains no more than 200 goals. That is, a maximum sum of 200 personal goals and assigned team goals or a total of 200 team goals is allowed for each goal plan.

The following features are **not** supported for performance goals and development goals:

- Linking goals
- Importing or exporting goals directly from the goal plan page
- Printing goals to HTML or PDF
- OData APIs, including those APIs used for solution extensions
- Layout configuration
- Spell Check
- Peers in People Selector
- Automatic goal numbering
- Searching for inactive users

The following features, for performance goals only, are **not** supported:

- Initiatives
- Adding goals using the SMART Goal Wizard

> **i Note**
>
> The SMART Goal Wizard option is not supported in Performance Management either.

- Tasks or targets of subgoals
- Goal Alignment Chart

The following features, for development goals only, are **not** supported:

- Custom learning activities
- Coaching Advisor

## 11.2.1 Reduced Scope for Mobile Apps

Some features of the latest Goal Management are not yet applicable to iOS and Android apps.

Features not supported for development goals only:

- Displaying the number of competencies on a goal card
- Selecting competencies at the library or category level
- Integrating with the Learning module

Features not supported for performance and development goals:

- Deleting a goal from the goal card
- Entering negative numbers for the `number` field type
- Switching back to the legacy view to see unsupported fields that are no longer displayed after template conversion
- Viewing the audit history of goals
- Legal Scan
- Advanced user search by criteria
- Integration with Dynamic Teams

# 11.3 Changes to Goal Plan Templates

To offer end users more flexibility and provide better visual appearance on the UI, we've simplified configurations and set new validations in goal plan templates of the latest Goal Management.

### Supported Elements

You can configure only the following elements in the latest Goal Management:

- obj-plan-id
- obj-plan-type
- obj-plan-name
- obj-plan-desc
- obj-plan-lastmodified
- obj-plan-start
- obj-plan-due
- switches
- category-config
- text-replacement
- obj-library
- behaviors

- category
- default-category
- field-definition
- obj-plan-states
- permission
- field-permission
- value-permission
- calculator (for performance goals only)
- auto-population (for performance goals only)
- learning-activities (for development goals only)
- competency-filters (for development goals only)

## Supported Attributes

You can configure only the following attributes in the latest Goal Management:

- show-total-goalscore
- max-goals
- min-goals
- max-weight
- min-weight
- max-weight-per-obj
- min-weight-per-obj
- new-obj-share-status-public
- allow-group-goal (for performance goals only)

> **i Note**
>
> - If the rules for the `max-weight-per-obj` and `min-weight-per-obj` attributes are **not** met, users can't create goals.
> - Configurations for the attributes don't take effect at the category level.

## Unsupported Fields

The following standard fields are **not** supported in the latest Goal Management:

| | Field Type | Field ID |
|---|---|---|
| For goals | bool | None of the field IDs for this type is supported. |
| | checkbox | None of the field IDs for this type is supported. |

| | Field Type | Field ID |
|---|---|---|
| | table | Only metric-lookup-table is supported.<br><br>The metric-lookup-table field is not supported in development plan templates as before. |
| | text | All other field IDs for this type are supported except the following:<br>• `obj-plan-field1`<br>• `achievement-text`<br>• `actual-achievement-text`<br>• `goto-url` |
| | link | None of the field IDs for this type is supported. |
| For milestones | bool | Field ID `completed` is not supported. |
| | date | None of the field IDs for this type is supported. |

## Changes to Fields

Learn about the changes that are made to the following fields in the latest Goal Management:

| Field ID | Field Type | Changes |
|---|---|---|
| name | | You must have this field with the attribute `required` set to `true` in the goal plan template.<br><br>This is the first field displayed on the UI when users create a goal.<br><br>The maximum length allowed for this field is 500. |
| desc | | The maximum length allowed for this field is 1000. |
| metric | | The maximum length allowed for this field is 1000. |
| start | | The start date must be between the `obj-plan-start` element value and the `obj-plan-due` element value in the goal plan template. |

| Field ID | Field Type | Changes |
| --- | --- | --- |
| due | | The due date must be between the `obj-plan-start` element value and the `obj-plan-due` element value in the goal plan template. |
| state | | We recommend that you set the label of the last enum value for this field to `complete`. This is because the last enum value triggers the `complete` state of a goal.<br><br>The background in the `style` attribute is not supported.<br><br>The text color is supported. The color configuration only supports HEX and the color name. Other configurations, such as RGB, are not supported. |
| weight | | If the rules for the `max-weight-per-obj` and `min-weight-per-obj` attributes are **not** met, users can't create a goal. |
| competency | | In development goals, this field is supported only when Job Profile Builder is enabled.<br><br>You can't define this field to require users to choose only one competency. |

| Field ID | Field Type | Changes |
|---|---|---|
| metric-lookup-table | | Metric lookup tables don't allow empty rows when the write permission is granted to this field.<br><br>The text in <field-description> is used as the tooltip for the *Information* icon of this field.<br><br>When you define this field using the <auto-population> element, the `manual` mode of this element is no longer supported and the system updates the auto-population results in real time. Also, the built-in calculators in this element are not fully supported. We recommend that you **not** use the built-in calculators.<br><br>If the `linearity` attribute of this field is set to `true` and you've entered the nonliner data in metric lookup tables, you can't save your changes when you edit a goal.<br><br>If the relationship between the `achievement` and `rating` fields is nonlinear but the `linearity` attribute of the `metric-lookup-table` field is set to `true`, you must update the relationship between these fields to linear or set the `linearity` attribute to `false`. Otherwise, you can't upload a goal plan template in Provisioning.<br><br>→ Remember<br><br>As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support. |

| Field ID | Field Type | Changes |
|---|---|---|
| comments | comment | The maximum length allowed for this field is 1000.<br><br>The code `<switch for="threaded-feedback" value="on" />` is no longer needed to configure this field. |
| | enum | The maximum enum members allowed for this field type are 20. |
| | text | The maximum length allowed for this field type is 500. However, the maximum length allowed for the standard field ID takes precedence. For example, if the field ID of this field type is `desc`, the maximum length allowed for this field is 1000. |
| | textarea | The maximum length allowed for this field type is 1000. However, the maximum length allowed for the standard field ID takes precedence. For example, if the field ID of this field type is `name`, the maximum length allowed for this field is 500. |

> **Note**
>
> For these fields `name`, `desc`, `metric`, `comments`, `text`, and `textarea`, if the value that you entered exceeds the maximum length before the upgrade to the latest Goal Management, you can only see the value within the limit in the goal plan of the latest Goal Management. However, you can go to *Report Center* to see the full value in the report.

## Related Information

Goal Plan Template Elements and Attributes [page 18]
Goal Plan Template Fields [page 26]

## 11.4 Enabling the Latest Goal Management

To use the latest Goal Management, enable it in the Upgrade Center.

### Context

> → Recommendation
>
> We recommend that you first test this feature in preview or test environments before enabling it for production environments. This feature targets those who use simpler goal functions and goal plan templates without complex configurations.

After you upgrade to the latest Goal Management, existing goal plan templates and the related goal data throughout all supported modules are available to you in the read-only mode unless you convert these templates.

### Procedure

1. Go to *Admin Center* > *Upgrade Center*.
2. Under *Optional Upgrades*, go to *Latest Goal Management*, and then choose *Learn More & Upgrade Now*.
3. Choose *Upgrade Now*.

   > ⚠ Caution
   >
   > This upgrade cannot be undone.
4. Follow the upgrade instructions.
5. (For SAP SuccessFactors Mobile only) Upon enablement of the latest Goal Management, do as follows to get started with the new experience on your mobile device:
   - If you're new to SAP SuccessFactors Mobile, download the latest app from App Store for iOS or Google Play for Android. The Android app is available from Tencent App Store if you're in mainland China.
   - If you already have the SAP SuccessFactors Mobile app on your mobile device, upgrade your app to 6.37 or later for iOS or 6.23 or later for Android.

### Results

You've upgraded to the latest Goal Management. You can view the completed upgrade through *Admin Center* > *Upgrade Center* > *View Recently Completed Upgrades*.

### Next Steps

- (Recommended) Upload a new goal plan template in Provisioning or add a new template from SuccessStore through *Admin Center* > *Manage Templates* for the latest Goal Management.

  > → Remember
  >
  > As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

- If you want to use existing goal plan templates and the related goal data in the latest Goal Management, convert these templates.

### Related Information

Converting Existing Goal Plan Templates [page 195]

## 11.5 Converting Existing Goal Plan Templates

Convert your existing goal plan templates so that you can use and edit your templates and the related goal data in the latest Goal Management. Template conversion is mandatory for integration with Continuous Performance Management, Onboarding 1.0, Onboarding 2.0, Performance Management forms, and 360 Reviews forms

### Prerequisites

You've upgraded to the latest Goal Management.

### Context

The conversion cannot be stopped or undone. Converting a template takes from a few minutes to several hours depending on the configuration and the amount of data in it.

> i Note
>
> - An existing goal plan template can be converted only once.
> - We recommend that:
>     - You convert existing goal plan templates that you actively use in the current goal cycle.
>     - You convert the next template only after the previous one is converted.

- We don't recommend that you convert existing goal plan templates that contain many complex calculation rules.
- Existing goal plan templates that contain data of group goals can't be converted. In this case, you need to upload a new template.

## Procedure

1. Go to *Admin Center* > *Manage Templates*.
2. Select the goal plan template that you want to convert.
3. Choose *Convert*.
4. Follow the conversion instructions.

## Results

Your template is converted and available for use in the latest Goal Management. The converted template retains the original ID and name so that it can integrate with other modules properly.

For backup and reference purposes, the original template is copied with a new ID and renamed as `<Original Name>` *Backup* in the read-only mode.

> **Note**
>
> Unsupported fields are not shown in the latest Goal Management. If you want to view this data, either create a report on the backup template if the template is already converted or go to *Legacy View* of the unconverted template.

## Related Information

Enabling the Latest Goal Management [page 194]

# 11.6 Team Goals in the Latest Goal Management

Learn about the preparations you need to make to enable users to properly work with latest team goals.

Enabling the Latest Team Goals [page 197]
Enable the Team Goals feature first so that users can access the latest team goals. Note that with the enablement of latest team goals, group goals (including the dynamic assignment feature) are no longer supported.

Permissions for the Latest Team Goals [page 198]
Users can properly work with the latest team goals only if you grant proper permissions to them.

Data Migration to the Latest Team Goals [page 201]
Data migration of the existing team goals is required during goal plan template conversion so that users can still check the existing team goals in the latest Goal Management. To migrate data, you need to follow the steps mentioned in Converting Existing Goal Plan Templates.

## 11.6.1 Enabling the Latest Team Goals

Enable the Team Goals feature first so that users can access the latest team goals. Note that with the enablement of latest team goals, group goals (including the dynamic assignment feature) are no longer supported.

### Prerequisites

- You've enabled the latest Goal Management.
- The `allow-group-goal` attribute is set to `true` in XML configurations.

### Context

The Team Goals feature can be enabled in either Admin Center or Provisioning.

> → Remember
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

### Procedure

1. Select *Enable Team Goals* in either of the following places:
    - *Admin Center* > *Goal Management Feature Settings*
    - *Provisioning* > *Company Settings*
2. Save the settings.

### Next Steps

- Migrate data of the existing team goals created through legacy Goal Management.

- Grant users proper permissions.

## Related Information

Data Migration to the Latest Team Goals [page 201]
Permissions for the Latest Team Goals [page 198]

# 11.6.2 Permissions for the Latest Team Goals

Users can properly work with the latest team goals only if you grant proper permissions to them.

## Required Permissions

| Permission | | User Action | Note |
| --- | --- | --- | --- |
| Role-based permissions | *User* > *Goals* > *Manage Team Goals* | Access the *Manage Team Goals* page. | |
| | *User* > *Goals* > *Create Team Goals* | Create team goals from scratch. | |

| Permission | | User Action | Note |
|---|---|---|---|
| | User > Goals > Assign Team Goals | • Assign team goals to people from their team or people found via search.<br>• Unassign a team goal from certain people. | • The create permission in XML configurations is required to assign team goals.<br>• Users can assign a single team goal or a bunch of team goals (no more than 30,000) at a time.<br>• When more than 50 goals are to be created through assigning at a time, a job is scheduled to run in the background.<br>→ Recommendation<br>We recommend that users start a new operation only after receiving an email saying that the job was completed.<br>• Team goals that are already assigned can't be assigned twice. They will be replaced with the latest version of their source goals. |
| | User > Goals > Delete Assigned Team Goals | Delete assigned team goals. | The delete permission in XML configurations is required to unassign team goals. |
| | User > Goals > Share Team Goals | • Share ownership of a team goal with others so they become co-owners of the goal.<br>• Withdraw shared ownership of a team goal from certain people. | |

| Permission | | User Action | Note |
|---|---|---|---|
| Goal plan template permission | The write permission in XML configurations for assigned team goals | Edit assigned team goals. | • Field-level read and write permissions are required to edit assigned team goals with `cascade-update` set to `"regular"`.<br>Note<br>Assigned team goals respect goal plan state configurations.<br>• Users can't edit assigned team goals if `cascade-update` is set to `"push-down"`. In this case, fields show as read-only. |

## Permission Requirements for Integrated Modules

Users can't create the latest team goals in Performance Management forms anymore.

To edit assigned team goals in modules that integrate with the latest Goal Management, users must obtain proper permissions.

| Integrated Module | Permission Requirement |
|---|---|
| Performance Management forms | • Goal section configurations in Performance Management<br>• Goal plan permissions of assigned team goals |
| 360 Reviews forms | • Goal section configurations in 360 Reviews<br>• Goal plan permissions of assigned team goals |
| Continuous Performance Management | Goal plan permissions of assigned team goals |

## Related Information

Goal Section
Goal Section

## 11.6.3 Data Migration to the Latest Team Goals

Data migration of the existing team goals is required during goal plan template conversion so that users can still check the existing team goals in the latest Goal Management. To migrate data, you need to follow the steps mentioned in Converting Existing Goal Plan Templates.

### Prerequisites

- You've enabled the latest Goal Management.
- You've enabled the latest Team Goals feature.

> **i Note**
>
> Data can't be migrated if template conversion happens prior to feature enablement.

### Important Notes

- Data of Group Goals 1.0 and Group Goals 2.0 is no longer migrated. Users can still view legacy group goals by switching back to *Legacy View*.
- Data migration won't impact integration between Goal Management with other modules. Users can still view assigned team goals in the integrated modules.

### Related Information

Enabling the Latest Team Goals [page 197]
Converting Existing Goal Plan Templates [page 195]

# 12 Using Goal Management on Mobile Apps

Mobile Goals are available for any customers who wish to get started with mobile goal management. The product offers the user access to their goal plan and the ability to quickly update goal status fields.

## What Is Currently Supported

- View all active goal plans
- Add goals
- Edit goals and delete goals
- View description and details of personal goals
- View and update status related fields (percentage complete, state/status, target/actual)
- View and update goal name field
- Manager access
- Cascade goals
- Metric lookup table
- Team goals

## Key Features Not Currently Supported

- Group goals (1.0 or 2.0)
- Goal plans state/workflow functionality (lock/unlock plans)
- Goal execution
- Goal library
- Smart goal wizard
- Automatic goal numbering

> **i Note**
>
> The list of Goal Management features that are currently not supported on Mobile is not an exhaustive list.

## What's Supported and Not Supported in the Latest Goal Management

For details about features that are supported and not supported in the latest Goal Management on Mobile apps, see *Overview of the Latest Goal Management* and *Reduced Scope for Mobile Apps*.

## Related Information

[Overview of the Latest Goal Management [page 184]]
[Reduced Scope for Mobile Apps [page 188]]

# 12.1 Enabling Mobile Goals

You enable users to view and edit their goals and managers to access their team's goals on a mobile device via the *Admin Center*.

## Context

Enabling mobile features applies to all mobile-enabled end-users. If you want to set up specific rights for specific individuals or groups of people, you need to select Mobile User Permissions from the Admin Center. If a mobile feature is enabled, only the end-users who have mobile permissions from *User Permissions* have access to that feature.

> **Note**
>
> The *Admin Access for Goal ODATA API Export* permission is for the Data Protection Officer role only. Do not grant this permission to users other than the Data Protection Officer. If this permission is enabled, mobile users can see previously deleted goals and may encounter system disfunction when they try to add, edit, or delete goals on a mobile device.

## Procedure

1. Go to *Admin Center* > *Mobile* > *Enable Mobile Features*.
   The *Mobile Settings* page appears.
2. On the *Enable Mobile Features* tab, expand the *Modules* header.
   The *Modules* section displays a list of features that you can enable.
3. Under *Talent*, select *Goals*, and on the confirmation message that appears, click *Turn ON*.

## Results

You have successfully enabled Mobile Goals.

## 12.2 Default Values in Mobile Goals

If you have configured default values for fields in a goal plan, you can now see those default values from mobile as well.

For example, configuring `weight` as `<default-value>0.0</default-value>` in the goal plan will show *0.0* as the default weight for a goal when a new goal is created.

**Supported Fields**

- Category
- Visibility
- All goal fields
- All subgoal fields
- All customized fields

**Unsupported Fields**

- Comment

# 13 Data Protection and Privacy

## 13.1 Centralized Data Protection and Privacy

Data protection and privacy features work best when implemented suite-wide, and not product-by-product. For this reason, they're documented centrally.

The *Implementing and Managing Data Protection and Privacy* guide provides instructions for setting up and using data protection and privacy features throughout the SAP SuccessFactors HXM Suite . Please refer to the central guide for details.

> i Note
>
> SAP SuccessFactors values data protection as essential and is fully committed to help customers complying with applicable regulations – including the requirements imposed by the General Data Protection Regulation (GDPR).
>
> By delivering features and functionalities that are designed to strengthen data protection and security customers get valuable support in their compliance efforts. However it remains customer's responsibility to evaluate legal requirements and implement, configure and use the features provided by SAP SuccessFactors in compliance with all applicable regulations.

### Related Information

Implementing and Managing Data Protection and Privacy

## 13.2 Data Retention Management

Identify which data purge function in the *Data Retention Management* tool meets your data protection and privacy requirements.

The *Data Retention Management* tool supports two different data purge functions: the newer data retention time management (DRTM) function and legacy non-DRTM function.

> → Remember
>
> We encourage all customers to stop using the legacy purge function and start using data retention time management (DRTM) instead. To get started using this and other data protection and privacy features, refer to the Data Protection and Privacy guide.

If you already use the legacy data purge function as part of your current business process and you are sure that it meets your company's data protection and privacy requirements, you can continue to use it, as long as you aware of its limitations.

> **i Note**
>
> If you are using the legacy data purge function, you can only purge a calibration session when there is at least one facilitator assigned to the session.

> **! Restriction**
>
> Be aware that the legacy data purge function may not meet your data protection and privacy requirements. It doesn't cover the entire HXM Suite and it doesn't permit you to configure retention times for different countries or legal entities.

In the longer term, we recommend that you also consider adopting the newer solution. In the meantime, to use legacy data purge, please refer to the guide here.

# 14 Using the Check Tool to Solve Issues

Get an overview of potential problems and errors in your configuration that you can try to solve yourself before you contact Product Support about an issue.

## Prerequisites

- You've enabled the Metadata Framework.
- You have the following *Administrator Permissions* > *Check Tool* permissions:
  - *Access Check Tool* authorizes users to access the tool.
  - *Allow Configuration Export* authorizes users to attach configuration information to a ticket.
  - *Allow Check Tool Quick Fix* authorizes users to run quick fixes for the checks that have this feature. A quick fix can be used to immediately correct any issues found by that check.

  For more information about role-based permissions, refer to List of Role-Based Permissions.

> → Tip
>
> Refer to Guided Answers for the Check Tool for a guided navigation through the available check tool checks and more information on each check.

## Context

The check tool provides an overview of the issues found in the system. New checks that are being added in a new release go through a first initial run to return a result. After the initial run, checks are run on a regular basis (at least monthly). We recommend you open the check tool after the upgrade to a new release to see if issues have been found by new checks.

In addition to these runs performed by the system, you can also run individual checks after you made changes to the system, for example, after updating data models or picklists. For more information, refer to the application-specific documentation.

## Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens displaying the results of the first tab **System Health**.
2. Depending on the check type of the check you're interested in, select the corresponding tab.

| Tab | Description |
| --- | --- |
| *System Health* | Displays configuration checks that have returned errors or warnings after the last run. We recommend you solve these in a timely manner.<br><br>To display all checks, select all result types in the *Result Type* search filter and select *Go*. |
| *Migration* | Displays the migrations that are still pending, either because the check tool couldn't automatically migrate all issues or because new issues have been found after the last run. We recommend you solve these in a timely manner.<br><br>To display all checks, turn on the *Show completed migrations also* search filter and select *Go*. |
| *Validation* | Displays a list of all validation checks.<br><br>**i Note**<br><br>Validation checks require one or more parameters for execution, therefore we can't run these checks automatically. You need to enter input parameters and run the corresponding check manually to get results. |

3. To solve a check that returned issues, click on it.

   The detail view opens to the right side of the screen with more information on the check and on how to solve the issue.
4. Evaluate the results and resolve the issues. If the check provides a quick fix that you can use to immediately correct issues found during a check run, select the *Quick Fix* button.
5. If you encounter an error you can't resolve, contact Product Support by creating a ticket.

## Next Steps

To verify that you've solved the underlying issue, select the checkbox for the corresponding checks and choose *Run Checks*. You can also wait until the next automatic run to see if the issue has been solved.

> **i Note**
>
> If the check you selected requires one or more prechecks (checks that need to be run successfully first), the prechecks are run first even if you haven't selected them.

## Related Information

Running Checks [page 209]

Using the Quick Fix Feature [page 214]

## 14.1 Benefits of the Check Tool

The SAP SuccessFactors check tool helps you identify and resolve issues when your system doesn’t work as you expect.

If your SAP SuccessFactors applications are behaving in unexpected ways, it is likely that it has a configuration or data conflict: you have some data that is inconsistent or a configuration error. The check tool quickly identifies these types of problems so that you can avoid support tickets. You might still need to create a support ticket if the problem is severe, but even in severe cases, the check tool can save you time because it can export the results of the check and your configuration for Product Support. The support engineer, therefore, can identify the issue more quickly.

When you open the check tool, you see:

- A list of issues in your configuration or data and the severity of each issue.
- A solution or recommendation to address the issue.

## 14.2 Running Checks

Trigger the execution of individual checks to find potential issues in the system, or to check if an issue has been solved in the meantime.

### Prerequisites

- You've enabled the Metadata Framework.
- You have the following *Administrator Permissions* > *Check Tool* permissions:
  - *Access Check Tool*
  - *Allow Configuration Export*
  - *Allow Check Tool Quick Fix*

### Context

In addition to the job runs performed automatically by the system, you can also run individual checks. For example:

- You want to check if the issue has been solved.
- You want to run a check as a prerequisite or post-step of a task. For example, you made changes to the system (such as updating data models or picklists), and you want to verify your changes didn't cause any new issues. For more information, refer to the application-specific documentation.

- Validation checks need to be run manually as they require input parameters.

## Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens displaying the results of the first tab *System Health*.
2. Depending on the check type of the check you want to perform, select the corresponding tab.

   A list of checks is displayed in the results table according to the predefined selection criteria.
3. **Optional:** If the check you're searching for is not listed in the results table, adjust the selection criteria and choose *Go*.

   You get a list of checks that fulfill the selection criteria you've entered.
4. Select the corresponding checks, and choose *Run Checks* from the top right of the results table.

   > **i Note**
   >
   > Please note that for checks on the *Validation* tab, you can only select one row at a time. Execution of multiple checks at once is not possible.
   >
   > Also, for validation checks you need to enter the required input parameters when running a check.

   > **i Note**
   >
   > If the check you selected requires one or more prechecks (checks that need to be run successfully first), the prechecks are run first even if you haven't selected them.

   The *Results* column displays any issues found.

## Next Steps

Investigate and solve the underlying issue.

# 14.3 Check Types

Overview of the different check types and their purpose.

The check type groups those checks that have a common purpose. On the *Check Tool* page, each tab represents a check type.

Overview of Check Types

| Check Type | Description | Automatic Job Runs |
| --- | --- | --- |
| System Health | Checks that run without parameters and check configuration and data issues that need to be fixed.<br><br>The predefined selection criteria displays only those that have returned errors or warnings after the last run. We recommend you solve these in a timely manner.<br><br>To display all checks, select all result types in the **Result Type** search filter and select *Go*. | • Automatic initial run at the beginning of a new release<br>• Periodic runs (usually monthly) |
| Migration | Checks that perform an automatic migration of features.<br><br>When you open the page, only pending migrations are displayed. To display also the competed migrations, turn on the *Show completed migrations also* search filter and select *Go*. | • Automatic initial run at the beginning of a new release<br>• Periodic runs (usually monthly) |
| Validation | Checks which need one or more parameters for execution, for example:<br>• A specific template<br>• A specific user<br>• A specific time frame<br><br>Validation checks can be triggered by single selection and choosing the *Run* button. A popup appears with input fields for the parameters. Execution of multiple checks at once is not possible. | Only triggered through user |

## 14.4 Check Results

After you run checks in the check tool, it returns the results of the check so that you can resolve issues that it found.

The results of a check are displayed in the *Result* column. If you run the checks multiple times to see how you're resolving issues, you can select a previous result from the *History* dropdown list.

> **i Note**
>
> To display the *History* dropdown list, click on a check. On the details screen that opens on the right side of the page, expand the header. The *History* dropdown list is directly below the check title.

Possible Results of Check Tool

| Result | Action |
|---|---|
| No issues found | If the tool can't find issues, you see a green check mark in the *Result* column. |
| Issues found | If the tool finds issues, it reports the number of issues and a yellow warning icon or a red alarm icon.<br>• The yellow icon indicates a low severity issue. The system proposes a solution.<br>• The red icon indicates a high severity issue. You must take action, which could include creating a support ticket. |
| Pending migrations | If the tool finds pending migrations that need to be completed by the user, you can see a yellow warning icon or a red alarm icon in the *Status* column on the *Migration* tab. |
| Completed | If the tool finds no issues with migration, or the migration has already been completed, you see a green check mark in the *Status* column on the *Migration* tab. |

> **i Note**
>
> - Select the *Export Results* button to download the check results. Ensure you run the check before exporting the check results. If not you can view only the first 100 check results.
> - The downloaded check result table can display a maximum number of 10,000 rows.

### Related Information

Creating Product Support Tickets from the Check Tool [page 212]

## 14.5 Creating Product Support Tickets from the Check Tool

When the check tool reports a serious issue that you can't solve, you might need to contact Product Support. You can create a support ticket from within the check tool.

### Prerequisites

You've run the check tool. You can find the check tool by going to *Admin Center* > *Check Tool*. You create the ticket from the details page of the tool.

## Procedure

1. Click on the check you can't solve.

   The detail view opens to the right side of the screen with more information on the check and on how to solve the issue.
2. On the *Result* tab, scroll down to the results table to look for the errors you want to report on.

   You usually contact Product Support for high severity issues not low severity issues.
3. On the *Check Information* tab, under *Need Assistance?*, copy the component ID.

   For example, LOD-SF-EC is the component ID for Employee Central.
4. Create a customer incident in the relevant category.
5. When you create the ticket, paste the component ID into the ticket.

# 14.6 Exporting Configuration Information

Export the configuration information from your system and attach it to the Support ticket created from the check tool. This information can help Support identify the issue of a check you can't solve yourself.

## Prerequisites

You have the *Administrator Permissions* > *Check Tool* > *Allow Configuration Export* permission.

## Context

> **Note**
>
> Not all applications have this feature enabled.

## Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens.
2. In the top-right corner, select *Use legacy Check Tool UI*.

   The legacy check tool UI opens with a list of all applications for which you can use the check tool.

3. Select the corresponding application.

   If the application has the export configuration feature enabled, you can see an information message at the bottom of the page with a link.
4. Choose the *Export Configuration* link in the information message.

### Results

The system downloads a file with the configuration information for the application you've selected.

### Next Steps

Attach the downloaded file to the Support ticket you created from the check tool.

## 14.7 Using the Quick Fix Feature

The check tool includes a quick fix feature that you can use to immediately correct issues found during a check run.

### Prerequisites

The checks which you want to solve with a quick fix have run and provide a check result with error or warning.

### Procedure

1. Go to *Admin Center* > *Check Tool*.

   The **Check Tool** page opens.
2. Click on the corresponding check you want to fix.

   The details screen opens on the right side of the page with more information about the check. If the check includes a quick fix, the *Quick Fix* button is displayed on the *Result* tab, under *Proposed Solution*.
3. Choose *Quick Fix* to start fixing the issue.

   A third screen opens to the right side, with step 1, called *Select Correction*, that shows one or more corrections for the issue.
4. Select the correction you want to carry out and choose *Step 2* to proceed to *Final Approval*.

   In the *Final Approval* step, you can opt to change your mind and not carry out the fix.

5. If you want to proceed, choose *Step 3*.

   The system confirms that the fix is now running.
6. Choose *Close* to complete the procedure.

   The system verifies that the fix has run correctly after a short time by running the check again.

## 14.8 Exporting a List of All Checks

Get an overview of all checks available in the system by exporting a CSV file.

### Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens.
2. In the top-right corner, select *Export all checks*.

   A CSV file with all checks available in the system is downloaded, including check descriptions and application area.

   > **i Note**
   >
   > The list includes also checks that you can't access from the user interface if you don't have the corresponding applications set up, or if you lack the required permissions.

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