SAP SuccessFactors

PUBLIC
SAP Best Practices for SAP SuccessFactors Performance and Goals
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Performance and Goal Management in SAP SuccessFactors: Test Script

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Content

1 Performance & Goal Management in SAP SuccessFactors

The detailed procedure for testing the scope item **Performance & Goal Management in SAP SuccessFactors** after solution activation is described in the following. Each process step is covered in its own section.

This document describes the process of performing Goal Management, Continuous Performance Management, Performance Management with Calibration, and 360 Degree Reviews, Continuous Performance Management in SAP SuccessFactors.

Goal Management enables employees and managers to align individual goals with company business goals and helps organizations ensure that all employees are aligned and working on the right things.

Continuous Performance Management involves an ongoing dialogue between the employee and manager. It includes regular check-ins to ensure employees are working on the right things in the right way. The Continuous Performance Management process follows these steps to enable employees to get quick feedback on their work through frequent and structured conversations with their manager. As a manager, it helps you track your team members' progress effortlessly and offers you a simple way to provide coaching advice.

Performance management involves an ongoing dialogue between the employee and manager. It includes establishing clear performance expectations to support business objectives and providing regular feedback and coaching. The Performance Management process follows these steps to evaluate an employee's performance and identify future performance expectations.

360 Degree Reviews helps organizations collect feedback on employees' performance and behavior from everyone, both inside and outside of an organization. Quantitative and qualitative data from 360 Developmental Surveys & Multi-Rater Assessments can be collected and graphically displayed by various categories. Leverage 360 degree reviews to help increase accuracy and effectiveness in providing feedback.

> **i Note**
>
> The Reimagined Home Page (Latest Home Page) will be pushed to all customer instances (that are not already migrated). For more details, check the Migration to Reimagined Home Page June 2022 - Innovation Alert post in the *SAP SuccessFactors Community*.
>
> Therefore all home page activities described in this solution are already based on the new UI experience.

2 Prerequisites

This section summarizes all prerequisites needed to conduct the test in terms of system, user, master data, organizational data, and other test data and business conditions.

2.1 System Access and Roles

The test is conducted in the following systems:

System	Details
SAP SuccessFactors	<Provide details on how to access system, for example system client or URL>

Use the following standard test users or assign roles to testers, respectively:

Business Role	Business Role Description	Business Role ID	Log On
Employee	Users who can maintain their own goals, their activities executed, and achievements obtained at their workplace, do self-evaluation in the performance review process and nominate raters for their 360 review. In addition, they themselves can evaluate on the 360 review of other employees as raters.	SFCC Employee on Self (Performance & Goal)	For testing purposes, proxy as the role using superuser role
Manager	Users who canmaintain and cascade goals to employees within the scope of their responsibilities, review the activities and achievements of their direct reports, and provide coaching advices to them, and give official rating for performance review of their direct reports and approve rater list, evaluate on employee's 360 review as raters, and check 360 detailed report.	SFCC Manager on Direct Report (Performance & Goal)	For testing purposes, proxy as the role using superuser role
Talent Administrator	Users who prepare the goal plan template and the performance review template and launch this template for all organizations.	SFCC Performance & Goal Administrator	For testing purposes, proxy as the role using superuser role

Business Role	Business Role Description	Business Role ID	Log On
HR Business Partner	Users who conduct the performance calibration session for employees.	SFCC HRBP (Performance & Goal)	For testing purposes, proxy as the role using superuser role
Rater	Users who give feedback to employee or manager for the employee's performance review and employee's competency in the 360 review form.	SFCC Employee on Self (Performance & Goal) or SFCC Manager on Direct Report (Performance & Goal)	For testing purposes, proxy as the role using superuser role

2.2 Business Conditions

Before this scope item can be tested, the organizational structureand employee master data of your company should be created in your system.As a result, you must ensure that the employee related basic data and talent data, such as competency already exist in the instance before you could start any activities in this scenario.

Business Condition	Comment
The employee's competencies should be maintained.	Check if the employee is assigned with a job code and there exist specific competencies for that job. Alternatively, ensure that core competencies are defined in your company. Some sample custom competencies have been defined in 360 review template, but customer can adjust them accordingly.

2.3 Preliminary Steps

2.3.1 Preliminary Steps for Goal Management

2.3.1.1 Define Corporate Objectives and Strategic Initiatives

Purpose

Initiatives are created by the **Talent Administrator**. They enable employees who will be assigned the initiatives to create corporate, division and departmental level initiatives, and allows them to actively associate their personal goals to the Initiatives. This feature greatly helps when working with Goals that are specific to departments and divisions and measures overall alignment of personal goals to strategic corporate, division or departmental initiatives.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company Instance as *Talent Administrator*.	The *Home* page is displayed.	
2.	**Access Admin Center**	Choose *Home* > *Admin Center* from the menu in the top left corner.	The *Admin Center* screen is displayed.	
3.	**Access Manage Initiatives**	Choose *Goal Management* > *Manage Initiatives* from the *Company Processes & Cycles* portlet.	The *Manage Initiatives* screen is displayed.	
4.	**Create Initiative Group with Initiatives**	Choose *Create Initiative Group*. In the upcoming *Create Initiative Group* dialog box, enter an *Initiative Group Name*, a relevant *Initiative Group Description* and set field *Active* to **Yes**. To add initiatives to the initiative group, choose *+ Add Initiative*. Enter *Initiative Name* and *Initiative Description*. **Note** To add additional initiatives, select again *+ Add Initiative* and enter details as appropriate. Choose *Save*.	The Initiative Group with a bunch of relevant Initiatives has been created. You return to the *Manage Initiatives* screen, where the newly created group is listed in the table.	

2.3.1.2 Prepare Goal Plan Template

Purpose

The goal plan template is updated by the **Talent Administrator** in preparation for the current year's goal management cycle. For this purpose, he or she copies the previous year's goal plan template and renames it to the current year.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company Instance as *Talent Administrator*.	The *Home* page is displayed.	
2.	**Access Admin Center**	Choose *Home* › *Admin Center* from the menu in the top left corner.	The *Admin Center* screen is displayed.	
3.	**Access Goal Plan Template**	Choose *Goal Management* › *Manage Templates* from the *Company Processes & Cycles* portlet, then choose the *Goal Plan* tab.	The *Manage Templates* screen is displayed, containing a list of existing goal plan templates.	
4.	**Copy Goal Plan Template**	Choose *Goal Plan*, choose *General Settings* on the left side column of the screen, adjust the *Start Date* and *End Date* if necessary, then choose the *Save As...* icon.	The *Goal Plan Template* for the current year has been created.	
5.	**Adapt Name of Copied Goal Plan**	Enter the name of the copied plan to reflect the current year, for example **`<year> Goal Plan`**. When done, select *Save*. Then in your newly copied goal plan template screen, choose again *General Settings* in the left side column of the screen. Choose *Change Language* dropdown list your current system language. Then change the name again and choose *Save* to save your change.		

2.3.1.3 Assign Initiatives to Goal Plan Template

Purpose

Initiatives are created by the **Talent Administrator**. After the goal plan has been created, the Talent Administrator needs to assign initiatives to the appropriate goal plan.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company Instance as *Talent Administrator*.	The *Home* page is displayed.	
2.	**Access Admin Center**	Choose *Home* › *Admin Center* › from the menu in the top left corner.	The *Admin Center* screen is displayed.	
3.	**Access Manage Initiatives**	Choose *Goal Management* › *Manage Initiatives* › from the *Company Processes & Cycles* portlet.	The *Manage Initiatives* screen is displayed.	
4.	**Edit Initiative Group (Optional)**	To edit an existing initiative group (for example the one you have created in process step Define Corporate Objectives and Strategic Initiatives [page 6]), select the *Team Goal Action* icon in the *Action* column next to the relevant *<Initiative Group Name>*. From the dropdown that expands, select *Edit*. In the upcoming *Edit Initiative Group* dialog box, update the *Initiatives* and other details as required. When done, choose *Save*.	Details of the initiative group have been updated. These updates will reflect later in the aligned *Goal Plan* of the assigned users.	
5.	**Assign Initiative Group to User**	To assign an initiative group to user(s), choose the *Team Goal Action* icon in the *Action* column next to the relevant *<Initiative Group Name>*. From the dropdown that expands, select *Assign*. In the upcoming *Initiative group Assignment* dialog box, choose the *Assign To User* tab. Select the users you want to assign the *Initiative Group* to from the *People Pool* dropdown. Choose the *Align With Goal Plan* tab, flag the checkbox next to one or several *Goal Plan* to be aligned with the *Initiative Group*. Choose *Done*.	The Initiative Group has been assigned to the selected users; it will appear on their *Goal Plan* when they add or edit a **Personal Goal**.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
6.	**Share Initiative Group**	To share an initiative group with other persons, choose the *Team Goal Action* icon in the *Action* column next to the relevant *<Initiative Group Name>*. From the dropdown that expands, select *Share*. In the upcoming *Share Initiative* dialog box, enter the *Employee* with whom you want to share the Initiative, and choose *Add*. Then choose *Done* to save your share.	The Initiative Group has been shared with the selected user(s); they will become the co-owners of the initiative group. If appropriate permissions for the *Admin Center* have been granted to the co-owners, they can assign, share, edit or even delete the initiative group.	
7.	**Revoke Initiative Group (Optional)**	You can give up your ownership of an Initiative Group by revoking your access rights. For this, choose the *Team Goal Action* icon in the *Action* column next to the relevant *<Initiative Group Name>*. From the dropdown that expands, select *Revoke*, and on the *Warning* message that appears, choose *Revoke*.	The Initiative Group no longer appears on your *Manage Initiatives* page.	
8.	**Delete Initiative Group (Optional)**	To delete an *Initiative Group*, you own, choose the *Team Goal Action* icon in the *Action* column next to the relevant *<Initiative Group Name>*. From the dropdown that expands, select *Delete*, and on the *Warning* message that appears, choose *Delete*. ⚠ Caution Pay attention, that when confirming the *Warning* message, the *Initiative Group* is not only deleted, but also removed from all *Goal Plans*, including the ones with which the *Initiative Group* was assigned by others.		

Result

Once an *Initiative Group* has been assigned to an employee, and aligned to the *Goal Plan*, it will appear on the *Goal Plan* whenever the employee is adding a new or editing an existing *Personal Goal*.

> **i Note**
>
> After defining corporate objectives and strategic initiatives, the Talent Administrator could communicate with the manager to start the goal setting.

2.3.2 Preliminary Steps for Performance Management

2.3.2.1 Prepare Performance Review Template

Purpose

The performance review template is updated by the Talent Administrator in preparation for the current year's performance review cycle. For this purpose, he or she copies the previous year's performance review template and renames it to the current year, and then updates the new template accordingly.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company Instance as *Talent Administrator*.	The *Home* page is displayed.	
2.	**Access Admin Center**	Choose *Home* > *Admin Center* from the menu in the top left corner.	The *Admin Center* screen is displayed.	
3.	**Access Performance Review Template**	Choose *Performance Management* > *Manage Templates* from the *Company Processes & Cycles* portlet, then choose the *Performance Review* tab.	The *Manage Template* screen is displayed, containing a list of existing performance and development plan templates.	
4.	**Copy Performance Review Template**	Choose into the performance review template *Performance Review* and select the *Save As ...* icon.	The performance review template has been copied.	
5.	**Adapt Name of Copied Template**	Enter the name of the copied plan to reflect the current year, for example **`<year> Performance Review`**. When done, choose *Save*.		

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
6.	**Adapt Route Map and Rating Scale**	Choose *General Settings* on the left side column of the screen, and modify the route map and rating scale, if appropriate: • *Route Map*: select the appropriate workflow of Performance review. • *Rating Scale*: The scale of ratings. If no change is necessary, you can simply leave as it was.		
7.	**Choose Goal Plan Template**	Select *Edit Fields and Sections* on the left side column of the screen and navigate to the *Performance Goals* section. In the *Section type* part, the *Goal Section* radio button is checked by default. Select from the *Choose which goal plan you want to link* dropdown goal plan template you want to link with this performance template. **Note** The selected goal plan template has to be the one prepared in preliminary step *Prepare Goal Plan Template*. *Save* your changes.	The goal plan template to which the performance review template is linked has been chosen.	

2.3.2.2 Prepare Calibration Template

Purpose

The **Talent Administrator** in preparation for the current year's calibration process, updates the performance management calibration template. For this purpose, he or she first copies the previous year's calibration template and renames it to the current year. Then he or she updates the calibration settings, like review period, data source and views design, if needed.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company Instance as *Talent Administrator*.	The *Home* page is displayed.	
2.	**Access Admin Center**	Choose *Home* › *Admin Center* from the menu in the top left corner.	The *Admin Center* screen is displayed.	
3.	**Access Manage Calibration Templates**	Choose *Calibration* › *Manage Calibration Templates* from the *Company Processes & Cycles* portlet.	The *Manage Calibration Templates* screen is displayed.	
4.	**Clone Calibration Template**	On the *Manage Calibration Template* screen, choose the *Clone Template* icon next to the *PM Calibration* template. On the upcoming screen make following entries: On the *Basic Info* tab *Template Name*: **`Performance Calibration - <Plan Year>`** *Review Period* : **`1st January of <plan year> - 31st December of <plan year>`** On the *Data* tab Flag the *Performance* check box and make following entries: *Template*: Select **`<year> Performance Review`** from dropdown *At which routing step can the data be used?*: Select **`Calibration`** from dropdown Adjust the elements and the corresponding distribution guidelines accordingly, if necessary. On the *Views* tab Choose the tab for the existing view; adjust the *Calibration Elements* for X-axis and Y-axis, as well as other settings like *View Name* if necessary, for example **`Overall Performance Rating`**. Choose *Save*. Choose *Back to Template List*.	The *calibration template* is prepared for the current performance management cycle.	

2.3.3 Preliminary Steps for 360 Degree Review

2.3.3.1 Map Job Code with Job Role

Purpose

The job code is mapped with job role in order to invoking competency mapped with job role when creating 360 review for user who has the appropriate job code.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company Instance as **Talent Administrator**.	The *Home* page is displayed.	
2.	**Access Admin Center**	Choose *Home* > *Admin Center* from the menu in the top left corner.	The *Admin Center* screen is displayed.	
3.	**Access Manage Job Profile Content**	In the *Company Processes & Cycles* portlet, choose *Company Settings* > *Manage Job Profile Content*, then select *Set Up Families and Roles* from the *Select Content Type...* dropdown.	The *Families* screen is displayed.	
4.	**Choose Role**	Choose the *Roles* tab and choose the name link of the appropriate role.	The job code has been mapped with the job role.	
5.	**Map Job Code**	On the *Edit: Role* page, stay on the *Role Mapped Job Codes* tab and choose *Map Job Codes*. In the upcoming *Add Job Code* dialog box, enter the first several letters of the job code you want to map until you see a dropdown list. Then select the appropriate job code from this list. Choose *Save*.		

2.4 Activate SAP SuccessFactors Mobile Application (Optional)

Before mobile related process steps can be executed, you need to first install and activate your SAP SuccessFactors Mobile application on your mobile device. There are four ways to activate the SAP SuccessFactors Mobile Application on mobile devices, and this document only describes the QR Code Activation. For other ways and more deployment information on how to set up Mobile application, refer to the *SAP SuccessFactors Mobile Deployment Guide* located in SAP Help Portal.

To activate your SAP SuccessFactors Mobile application using the QR code proceed as follows:

1. Download and install the *SAP SuccessFactors Mobile App* in your mobile device (from App Store).
2. The user, who needs to execute the process steps on the mobile, logs in to the SAP SuccessFactors website.
3. Choose the dropdown menu and select *Options*.
4. In the *Options* screen, select *Mobile*.
5. Select *Activate via Camera* option.
6. The camera is activated, and you have 30 seconds to scan the displayed QR Code.
7. Open the *SAP SuccessFactors Mobile App* on your mobile device.
8. Choose the *Add Profile* box and tap *Scan QR Code*, scan the QR Code displayed in your SAP SuccessFactors website.
9. If the QR Code expires, choose the *Get New Code* to generate a new QR Code.
10. Once the QR Code is validated, the *User License* screen appears on your mobile device. Read the *End User License Agreement (EULA)* and make the appropriate selections on the mobile device to accept the *User License Agreement*.
11. The SAP SuccessFactors mobile application is now activated. The corresponding user profile is added.

> **i Note**
>
> For testing purpose, you can use one mobile device for different business roles involved in the Goal Management process. To realize this, repeat the steps listed above using different users, such that you then can get all user profiles prepared in your SAP SuccessFactors Mobile App.

In this package, following users should be prepared before you perform the process steps:

- Manager,
- Employee.

3 Overview Table

The scope item **Performance & Goal Management in SAP SuccessFactors** consists of several process steps provided in the table below.

Process Step	Business Role	Transaction	Expected Results
Goal Management [page 19]			
Set and Cascade Goals on Company Website [page 20] Set Goals via Mobile Device (Optional) [page 22]	Manager	Company Instance URL/ Mobile App	Goals have been created and cascaded to the direct reports.
Create and Maintain My Goals on Company Website [page 24] Create and Maintain My Goals via Mobile Device (Optional) [page 26]	Employee	Company Instance URL/ Mobile App	New goals have been created and cascaded goals have been maintained by employees.
Update My Goal Plan on Company Website [page 28] Update My Goal Plan via Mobile Device (Optional) [page 28]	Employee	Company Instance URL/ Mobile App	After communication with the manager, the goal plans have been updated and reviewed by the employee.
Continuous Performance Management [page 29]			
Maintain My Activity [page 30] (on Company Website or via Mobile Device)	Employee	Company Instance URL/ Mobile App	An activity or achievement has been created or updated by the employee to keep track of the items he or she is working on.
Maintain Employee Activities [page 33] (on Company Website or via Mobile Device)	Manager	Company Instance URL/ Mobile App	Activities for a direct report have been maintained and achievements of this direct report have been reviewed.
Proactively Request Feedback [page 36] (on Company Website or via Mobile Device)	Employee	Company Instance URL/ Mobile App	The employee has requested feedback from other employees within the organization.
Provide Feedback [page 38] (on Company Website or via Mobile Device)	Stakeholder (any Employee in the organization)	Company Instance URL/ Mobile App	The stakeholder has provided feedback to the employee's activities and/or achievements.

Process Step	Business Role	Transaction	Expected Results
View Feedback [page 40](on Company Website or via Mobile Device)	Employee	Company Instance URL/ Mobile App	The feedback provided by the stakeholder has been viewed by the requesting employee.
Add Topics for 1:1 Meeting [page 43](on Company Website or via Mobile Device)	Employee / Manager	Company Instance URL/ Mobile App	Topics for the next 1:1 meeting have been added.
Conduct 1:1 Meeting (Process Step Outside Software) [page 45]	Manager / Employee	Outside Software	The 1:1 meeting between employee and manager has taken place.
Confirm 1:1 Meeting [page 46] (on Company Website or via Mobile Device)	Employee	Company Instance URL/ Mobile App	Topics, which have been discussed during the 1:1 meeting, have been confirmed. The 1:1 meeting has been archived in the system.
Maintain My Achievement [page 48](on Company Website or via Mobile Device)	Employee	Company Instance URL/ Mobile App	An achievement has been added by the employee to keep track of the items he or she is working on.
Maintain Employee Achievements [page 50](on Company Website or via Mobile Device)	Manager	Company Instance URL/ Mobile App	Achievements of a direct report have been reviewed.
Update My Goal Plan (Optional) [page 53]	Employee	Company Instance URL	Possible updates in the employee's goal plan have been performed.
Performance Management [page 54]			
Launch Performance Review Forms [page 54]	Talent Administrator	Company Instance URL	The performance review forms are launched for employees in the organization.
Request Employee Performance Evaluation from Raters (Optional) [page 56]	Manager	Company Instance URL	The manager has asked raters to give feedback on this performance form.
Provide Feedback on Employee Performance (Optional) (Process Step Outside Software) [page 57]	Rater	Outside Software	The raters have given feedback via email.
Perform Self-Evaluation [page 57]	Employee	Company Instance URL	The employee has performed the self-evaluation of his or her performance.
Review Feedback on Employee Performance from Raters (Optional) [page 59]	Manager	Company Instance URL	The manager has reviewed the feedback from raters.
Rate and Compare Employees Competencies (Optional) [page 60]	Manager	Company Instance URL	The manager has compared and rated the competencies of all his or her subordinated employees in one page

Process Step	Business Role	Transaction	Expected Results
Review Employee Performance [page 61]	Manager	Company Instance URL	The manager has rated the employee's performance.
Create Calibration Session [page 63]	Talent Administrator	Company Instance URL	The calibration session has been created.
Calibrate Employee Performance Rating [page 65]	HR Business Partner	Company Instance URL	The employee's performance has been calibrated.
Finalize Year-End Review Prior to Communication [page 67]	Manager	Company Instance URL	The year-end review of the employee has been finalized.
Conduct Year-End Performance Review Meeting (Process Step Outside Software) [page 68]	Manager	Outside Software	The review meeting between manager and employee has taken place.
Sign My Performance Review Form [page 69]	Employee	Company Instance URL	The employee has signed the performance review form.
Sign Employee Performance Review Form [page 70]	Manager	Company Instance URL	The manager has signed employee's performance review form.
360 Degree Review (Optional) [page 71]			
Create 360 Degree Review Form for Self [page 72]	Employee	Company Instance URL	The employee has created the 360 degree review form for him- or herself.
Nominate Raters [page 73]	Employee	Company Instance URL	Raters to evaluate the 360 review form have been nominated by the employee.
Process Employee Rater List [page 76]	Manager	Company Instance URL	The rater list has been approved by the employee's line manager. The form has been sent out to the raters for providing feedback.
Conduct 360 Degree Review [page 79]	Rater	Company Instance URL	The 360 degree review form has been evaluated by all raters.
Review Employee Detailed 360 Degree Report [page 81]	Employee/Manager	Company Instance URL	The 360 degree detailed report has been reviewed by the employee and his/her manager.

4 Test Procedures

This section describes test procedures for each process step that belongs to this scope item.

The test should take around 300 minutes.

4.1 Goal Management

Purpose

At the start of a new performance cycle, the line managers and their direct reports create and agree on goal plans for each employee. The goal plans need to be aligned to the company strategy and goals.

The process steps to achieve this are detailed below.

4.1.1 Set and Cascade Goals

Purpose

The Manager creates goals and then cascades them to his or her direct reports.

If the SAP SuccessFactors Mobile application has been activated on the Employee's mobile device as described in section Prerequisites [page 5], the manager has the option to maintain the goals for his/her direct reports either on the companyinstance website or on the mobile device. Cascading goals is possible only on the company website though.

These options are detailed below.

4.1.1.1 Set and Cascade Goals on Company Website

Purpose

The Manager creates goals and then cascades them to his or her direct reports.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company Instance as **Manager**.	The *Home* page is displayed.	
2.	**Access Goal module**	Choose *Home* > *Goals* from the menu in the top left corner.	The *Goals* screen is displayed.	
3.	**Select Goal Plan**	Next to your username, choose **`<New copied goal plan>`** (for example **`<year> Goal Plan>`**) from the dropdown menu.	The *<year> Goal Plan* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Add New Goals**	Choose *Add goal* and select either *Create a New Goal* or *Goal Wizard*. If you choose *Create a New Goal*, the *Create a New Goal* dialog box is displayed. Choose either *Personal Goal* or *Library Goal*. If you are using *Personal Goal*, maintain in the *Add Goal* dialog box, the goal details as appropriate. If you have been assigned to initiative groups, these and the appropriate initiatives are visible at the bottom of the *Add Goal* dialog box. Flag the check-box next to the initiative of relevance. Then choose *Save Changes*. If you are using *Library Goal*, choose the appropri-ate link to expand the categories, flag one or more goal check boxes and then choose *Add Selected*. In the upcoming *Add Goal* dialog box, you can modify the goal, if needed. Then choose *Save Changes*. If *Goal Wizard* has been selected: Maintain your goal as instructed by the *SMART Goal Wizard*, in the *Confirm and Save* screen, choose *Add More Details*, and enter the *Weight*, then choose *Save & Close*.	A new goal has been created. You return to the *<year> Goal Plan* screen.	
5.	**Cascade Goals to Employee**	Flag the checkbox in front of the goal(s) and choose *Actions* > *Cascade* on top-right cor-ner of the screen. In the upcoming dialog box, se-lect the employee under your hierarchy (for this, flag the checkbox in front of employee's name) or use *Find Other Employees* to help searching the employee. After the employee is selected, choose *Next*, and make changes according to your own requirements and then select *Cascade*. A system message is displayed informing that the goals have been cascaded successfully. Choose *OK*. You return to your *<year> Goal Plan* screen. Choose *Display Options* on top-right corner of the screen, flag the *Aligned Down* checkbox and choose the *Update*.	The goal is cascaded to the em-ployee. Below the *year <Goal Name>*, the employee is listed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
6.	**Edit Goal for Employee (Optional)**	You can edit an existing goal for an employee. For this, choose the employee's name beside the employee's picture to navigate to that employee's goal plan. You can see the goal just cascaded and other existing goals if there is any. Select the *Edit goal* link next to the goals name to modify a goal, When done, choose *Save Changes*.	An employee's goal has been updated.	
7.	**Delete Goal for Employee (Optional)**	In case you need to delete a goal of an employee, choose in the *Action* column of the respective goal the *Actions* three dot icon, and from the expanded dropdown menu select *Delete goal*. In the dialog box the message *Are you sure you want to delete this Goal ?* is issued. Select *OK*.	An employee's goal has been deleted.	

> **i Note**
>
> After the manager has created goals for himself or herself and for the team, it is necessary to schedule meetings with the employees to discuss their goals setting.

4.1.1.2 Set Goals via Mobile Device (Optional)

Purpose

The Manager creates goals for his or her direct reports.

> **i Note**
>
> If the mobile application is not enabled, this option is not available and only the procedure described in **Set and Cascade Goals on Company Website** can be executed.

> **i Note**
>
> In this document, we only describe the screen elements of the iOS system. The SAP SuccessFactors Mobile application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1	**Log on**	Open the *SAP SuccessFactors* mobile app and log on as **Manager** by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2	**Access Goals and Select Goal Template**	In the *My Activities* tile, scroll down and tap *Goals* and choose goal plan by taping *Goal Plan* to choose which goal plan you want to use (for example **`<year> Goal Plan>`**). Tap *Done*.	The *<year> Goal Plan* screen is displayed.	
3	**Add New Goals**	Choose *Add Goal*. Make following entries: **`<Category>, <Goal Name(Required)>`**, **`<Metric/Target(Required)>, <Weight(Required)>, <Status>, <Start>`** and **`<Due>`**. Choose *Done*.	A new goal has been created. You return to the *<year> Goal Plan* screen.	
4	**Add New Goals for Employees**	Go to the *Team* tab and tap the direct report for whom you want to add goal for. On the **`<employee name>`** page, scroll down and tap *Goals* and choose goal plan by taping *Goal Plan* to choose which goal plan you want to use (for example **`<year> Goal Plan>`**). Tap *Done*. To create a new goal, proceed as described in process test step # 3.	A new goal has been created. You return to the*<year> Goal Plan* screen.	
5	**Edit Goal for Employee (Optional)**	Choose the goal which you want to edit. Tap *Edit* at the upper right corner and change the content for your goal then tap *Done*. You can also maintain comments to the goals for you or your subordinates by tapping *Add Comments*. After maintaining the comments tap *Done*.	An employee's goal has been updated.	
6	**Delete Goal for Employee (Optional)**	In case you need to delete a personal goal, choose the goal which you want to delete. Tap *Delete Goal* at the bottom of the *Goal Detail* page. And choose *Delete* to confirm.	An employee's goal has been deleted.	

i Note

After the manager has created goals for himself or herself and for the team, it is necessary to schedule meetings with the employees to discuss their goals setting.

4.1.2 Create and Maintain My Goals

Purpose

The Employee maintains goals in his or her goal plan. This includes adaptions of the goals cascaded by the manager, as well as creating new own goals.

If the *SAP SuccessFactors* Mobile application has been activated on the Employee's mobile device as described in section Prerequisites [page 5], the employee has the option to maintain the goals either on the company instance website or on the mobile device.

4.1.2.1 Create and Maintain My Goals on Company Website

Purpose

The Employee can maintain the goals cascaded from his or her manager. Also, he or she can create, edit or delete own goals.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company Instance as **Employee**.	The *Home* page is displayed.	
2.	**Access Goal module**	Choose *Home* > *Goals* from the menu in the top left corner.	The *Goals* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Select Goal Template**	Next to your username, choose **`<New copied goal plan>`** (for example **`<year> Goal Plan>`**) from the dropdown menu.	The *<year> Goal Plan* screen is displayed.	
4.	**Add New Goals**	To create a new goal, proceed as described in process step Set and Cascade Goals on Company Website [page 20], test Step # 4.	A new goal has been created. You return to the *<year> Goal Plan* screen.	
5.	**Maintain Existing Goal**	Select the *Edit* link next to the name of the goal to be maintained. On the upcoming *Edit Goal* dialog box, change details as appropriate, then choose *Save Changes*. **i Note** If you have direct reports, you can cascade goals further down; for details see process step Set and Cascade Goals on Company Website [page 20], test step # 5. You can also maintain *Comments* to the goals for you or your subordinates.	The goal has been maintained.	
6.	**Delete Existing Personal Goal (Optional)**	In case you need to delete a personal goal, choose from the *Action* column of the goal the *Actions* three dot icon, and from the expanded dropdown menu select *Delete Goal* in the upcoming dialog box the message *Are you sure you want to delete this Goal?* is issued. Select *OK*.	A personal goal has been deleted.	

> ⚠ **Caution**
>
> You must have at least one goal.

Make sure that the total weights of all goals in your goal plan are summed up to 100%, although there is no stop in this goal planning phases. However, **total goal weights = 100%** will be the essential requirement to proceed with performance review process.

> **i Note**
>
> When the employee completes the goal setting, the employee and the manager need to discuss and agree on the content of the goal in order to finalize the goal plan.

4.1.2.2 Create and Maintain My Goals via Mobile Device (Optional)

Purpose

The Employee can maintain the goals cascaded from his or her manager.Also, he or she can create, edit or delete own goals.

> **i Note**
>
> If the mobile application is not enabled, this option is not available and only the procedure described in **Create and Maintain My Goals on Company Website** can be executed.
>
> In this document, we only describe the screen elements of the iOS system. The SAP SuccessFactors Mobile application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the *SAP SuccessFactors* mobile app and log on as **Employee** by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2.	**Access Goals and Select Goal Template**	In the *Goals* tile, tap *Plans* at the upper right corner to choose which goal plan you want to use (for example **`<year> Goal Plan>`**). Tap *Done*.	The *<year> Goal Plan* screen is displayed.	
3.	**Add New Goals**	Tap *Add Goal*. Make following entries: **`<Category>, <Goal Name (Required)>`**, **`<Metric(Required)>, <Weight(Required)>, <Status>, <Start>`** and **`<Due>.`** Tap *Done*.	A new goal has been created. You return to the *<year> Goal Plan* screen.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Maintain Existing Goal**	Choose the goal which you want to edit. Tap *Edit* at the upper right corner and change the content for your goal then tap *Done*. You can also maintain comments to the goals for you or your subordinates by tapping *Add Comments*. After maintaining the comments tap *Done*.	The goal has been maintained.	
5.	**Delete Existing Personal Goal (Optional)**	In case you need to delete a personal goal, choose the goal which you want to delete. Tap *Delete Goal* at the bottom of the *Goal Detail* page. And choose *Delete*.	A personal goal has been deleted.	

⚠ Caution

You must have at least one goal.

Make sure that the total weights of all goals in your goal plan are summed up to 100%, although there is no stop in this goal planning phases. However, **total goal weights = 100%** will be the essential requirement to proceed with performance review process.

When the employee completes the goal setting, the employee and the manager need to discuss and agree on the content of the goal in order to finalize the goal plan.

4.1.3 Update My Goal Plan

Purpose

After the employee and manager have discussed and agreed on the employee's goal plan, the employee needs to check his or her goal plan and update it if required. He or she needs to make sure that the goal plan is the final one in the system.

If the *SAP SuccessFactors* Mobile application has been activated on the Employee's mobile device as described in section Prerequisites [page 5], the employee has the option to update the goal plan either on the company instance website or on the mobile device.

4.1.3.1 Update My Goal Plan on Company Website

Purpose

After the employee and manager have discussed and agreed on the employee's goal plan, the employee needs to check his or her goal plan and update it if required. He or she needs to make sure that the goal plan is the final one in the system.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors** company instance as **Employee**.	The *Home* page is displayed.	
2.	**Access Goals**	Choose *Home* > *Goals* from the menu in the top left corner.	The *Goals* screen is displayed.	
3.	**Select Goal Plan**	Next to your username, choose `<New copied goal plan>` (for example `<year> Goal Plan>`) from the dropdown menu.	The *<year> Goal Plan* screen is displayed.	
4.	**Update Goals**	Update the appropriate goals if needed, proceed as described in process step *Set and Cascade Goals on Company Website*, test steps # 4,6,7.	Complete the goals updating.	

4.1.3.2 Update My Goal Plan via Mobile Device (Optional)

Purpose

After the employee and manager have discussed and agreed on the employee's goal plan, the employee needs to check his or her goal plan and update it if required. He or she needs to make sure that the goal plan is the final one in the system.

> **i Note**
>
> If the mobile application is not enabled, this option is not available and only the procedure described in **Update My Goal Plan on Company Website** can be executed.
>
> In this document, we only describe the screen elements of the iOS system. The SAP SuccessFactors Mobile application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the *SAP SuccessFactors* mobile app and log on as **Employee** by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2.	**Access Goals and Select Goal Template**	In the *Goals* tile, tap *Plans* at the upper right corner to choose which goal plan you want to use (for example **`<year> Goal Plan>`**). Tap *Done*.	The *<year> Goal Plan* screen is displayed.	
3.	**Update Goals**	Update the appropriate goals if needed, proceed as described in process step Create and Maintain My Goals via Mobile Device (Optional) [page 26] test steps # 3, 4.	Complete the goals updating.	

4.2 Continuous Performance Management

Purpose

The employees and their line managers engage in feedback and coaching sessions on a regular basis. Thus, potential issues are identified as soon as they occur and can be mitigated through ad-hoc improvements of the goal plans.

The process steps to achieve this are detailed below.

4.2.1 Maintain My Activity

Purpose

The Employee creates and possibly updates activities to track the topics he or she is working on.

If the SAP SuccessFactors Mobile application has been activated on the Employee's mobile device as described in section Activate SAP SuccessFactors Mobile Application (Optional) [page 15], the employee has the option to maintain the activities either on the company instance website or on the mobile device.

These options are detailed below.

4.2.1.1 Maintain My Activity on Company Website

Purpose

The Employee maintains on the company website activities to track his or her work.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors** Company Instance as **Employee**.	The *Home* page is displayed.	
2.	**Access Continuous Performance module**	Choose *Home* > *Continuous Performance* from the menu in the top left corner.	The *Continuous Performance* screen is displayed. On the left part of the screen, the *Active Channels* are listed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Add Activity**	In the *My Activities with <my manager>* part of the screen, choose *Create Activity*. In the upcoming *Create Activity* dialog box, enter *Activity Name* and *Status*. If the new activity has a relationship to an existing performance goal in the default performance goal plan, select it from the *Performance Goal* dropdown. **Note** You can link the activity to the default development goal as well. Then choose *Save*. In the upcoming *Success* dialog box, you have the option to add another activity. Otherwise, choose *Close*. By default, your activities are grouped as *View by Status*. You can group them as *View by Goal* as well, however, only the activities that are linked to a performance goal will display.	A new activity has been added. You return to the *My Activities with <my manager>* screen.	
4.	**Edit Activity (Optional)**	If required, you can edit an existing activity by choosing the activity which you want to edit. Then choose *Edit* in the top right corner. In the upcoming *Edit Activity* dialog box, maintain the information that you want to change. Then choose *Save*.	The activity has been edited.	
5.	**Delete Activity (Optional)**	If required, you can delete an existing activity by choosing the activity which you want to delete. Then choose *Delete* in the top right corner. In the upcoming message dialog box confirm your choice by choosing *Delete*.	The activity, including any associated achievements (if existing), has been deleted.	
6.	**Add Update to Activity (Optional)**	You can add a comment to an activity. For this, choose the activity which you want to update, add comments in the *Updates* text box and choose *Post* to save it. If required, you can edit the update by choosing the *Edit* icon next to the update. In the upcoming text box, maintain the information that you want to add or change. Then choose *Save*. If required, you can delete the update. For this, choose *Delete* next to the appropriate update, and in the upcoming dialog box choose *Delete* to confirm your choice.	An update to the activity has been added.	

4.2.1.2 Maintain My Activity via Mobile Device (Optional)

Purpose

The Employee maintains via his or her mobile device activities to track his or her work.

If the mobile application is not enabled, this option is not available and only the procedure described in Maintain My Activity on Company Website [page 30] can be executed.

In this document, we only describe the screen elements of the iOS system. The SAP SuccessFactors Mobile application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the **SAP SuccessFactors** mobile app and log on as *Employee* by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2.	**Open Activities Page**	In the *My Activities* tile, choose the *Add* icon.	The *Add Activity* screen is displayed.	
3.	**Add Activity**	Enter activity information in *Describe your activity* box and choose *Status*. If applicable, link your activity to a performance goal by tapping *Goal* and choosing a goal on the upcoming *Goals* page. Make sure you are using the default performance goal plan. Then choose *New Activity* to go back to *New Activity* page. Choose *Save*.	A new activity has been added. You return to the *My Activities* screen.	
4.	**Edit Activity (Optional)**	If required, you can **edit** an existing activity. Tap the activity you want to edit and on the *Activity Details* screen, update the information of this activity, then choose *Done* to save it.	The activity has been edited.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	**Delete Activity (Optional)**	If required, you can **delete** an existing activity. Tap the activity you want to delete and on the *Activity Details* screen choose the **three dot** icon. Tap *Delete Activity* at the top right corner of the screen and in the upcoming message dialog box choose *Delete* to confirm your choice.	The activity has been deleted.	
6.	**Add Update for Activity (Optional)**	To add a comment to an activity, choose *Add an Update* at the bottom of the screen and choose the *arrow* icon to send the update.	The update has been added.	

4.2.2 Maintain Employee Activities

Purpose

The manager can easily track the work of his or her direct reports, by creating and monitoring activities, assigning an appropriate status to the activities, and linking the activities to performance goals.

If the SAP SuccessFactors Mobile application has been activated on the Manager's mobile device as described in section Prerequisites [page 5], the manager has the option to maintain the activities either on the company instance website or on the mobile device.

These options are detailed below.

4.2.2.1 Maintain Employee Activities on Company Website

Purpose

The manager maintains activities for a direct report on the company website.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors** Company Instance as **Manager**.	The *Home* page is displayed.	
2.	**Access Continuous Performance module and Choose Employee**	Choose *Home* ▸ *Continuous Performance* from the menu in the top left corner. On the upcoming *Continuous Performance* screen, select in the *Active Channels* part of the screen, the direct report for whom you want to add an activity. **Note** Alternatively, you can choose on the *Home* page, in the *Quick Actions* section, the *My Team* card. In the upcoming *My Team* dialog box, select on the left side your direct report for whom you want to add an activity. The chosen employee displays in the right part of the dialog box. Choose *Go To*, and from the dropdown that expands choose *Activities*.	The *Continuous Performance* screen is displayed. On the left part of the screen, the *Active Channels* are listed, containing your direct reports and your manager. On the right part of the screen, the *Activities for <employee name>* page is displayed, containing the activities defined so far for the selected employee.	
3.	**Add Activity for Employee**	In the *Activities for <employee name>* part of the screen, choose the *View by Status* tab. Choose *Create Activity*. In the upcoming *Create Activity* dialog box, enter *Activity Name* and *Status*. If the new activity has a relationship to an existing performance goal in the default performance goal plan, select it from the *Performance Goal* dropdown. **Note** You can link the activity to the default development goal as well. Choose *Save*. In the upcoming *Success* dialog box, you have the option to add another activity. Otherwise, choose *Close*.	A new activity has been added for the employee.	
4.	**Review Activities of Employee**	Review existing activities, which have been created by the employee. If needed, add a comment; for this select the activity, add in the *Updates* text box an appropriate comment and choose *Post* to save it.	The existing activities of a direct report have been reviewed.	

4.2.2.2 Maintain Employee Activities via Mobile Device (Optional)

Purpose

The manager maintains activities for the direct report via his or her mobile device.

If the mobile application is not enabled, this option is not available and only the option described in Maintain Employee Activities on Company Website [page 33] can be executed.

In this document, we only describe the screen elements of the iOS system. The *SAP SuccessFactors* Mobile application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the *SAP SuccessFactors* mobile app and log on as **Manager** by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2.	**Access Activity Page**	Go to the *Team* tab and tap the direct report for whom you want to add an activity.	The *Employee Continuous Performance Management* screen is displayed.	
3.	**Add Activity for Employee**	On the next screen, choose *Activities* and choose the *Add* icon. Enter activity information in *Describe your activity* box and select *Status*. If applicable, link the activity to a performance goal by choosing *Goal* and choosing a goal on the upcoming *Goals* page. Make sure you are using the default performance goal plan. Then choose *New Activity* to go back to *New Activity* page. Choose *Save*.	A new activity has been added.	
4.	**Review Activities of Employee**	Review existing activities, which have been created by the employee. If appropriate, choose the activity and add a comment by choosing *Add an update*, then tap the *Arrow* icon to send the update.	The existing activities of a direct report have been reviewed.	

4.2.3 Proactively Request Feedback

Purpose

The **Request Feedback** feature allows employees to gather feedback on their activities from stakeholders. A stakeholder can be any other employee within the organization.

If the SAP SuccessFactors Mobile application has been activated on the Employee's mobile device as described in section Activate SAP SuccessFactors Mobile Application (Optional) [page 15], the employee has the option to request feedback either on the company instance website or on the mobile device.

These options are detailed below.

4.2.3.1 Proactively Request Feedback on Company Website

Purpose

The Employee requests via the company website feedback from stakeholders on his or her activities.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors** company instance as **Employee**.	The *Home* page is displayed.	
2.	**Access Continuous Performance module**	Choose *Home* > *Continuous Performance* from the menu in the top left corner.	The *Continuous Performance* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Request Feedback on Activities**	On the *My Activities with <manager name>* page, choose an activity for which you want to request feedback. On the upcoming *Activities / Activity Details / <activity name>* page, choose *Request Feedback* at the top right corner of the screen. In the upcoming *Request Feedback* dialog box, write the stakeholder's name in the *Select People* text box. In the *Enter a topic and at least one question* section that displays, enter a text in the *Feedback Topic* text box to explain your request for feedback. Then choose *Send*. On the upcoming success dialog box, choose *OK*.	The request for feedback to an activity has been sent. An appropriate email is sent out to the person from whom feedback has been requested. **Note** In case you request feedback from the same person for different activities, that person will receive for each feedback request a separate email.	

4.2.3.2 Proactively Request Feedback via Mobile Device (Optional)

Purpose

The Employee requests, via his or her mobile device, feedback from stakeholders on his or her activities.

If the mobile application is not enabled, this option is not available and only the option described in Proactively Request Feedback on Company Website [page 36] can be executed.

In this document, we only describe the screen elements of the iOS system. The SAP SuccessFactors Mobile application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the *SAP SuccessFactors* mobile app and log on as **Employee** by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2.	**Request Feedback**	In the *More* tile, tap *Feedback*. On the Feedback view, tap *Request Feedback* and tap the *Pen* icon at the top right corner of the screen, then tap *Request Feedback* to confirm your choice. Under the *Send a feedback request to your selected colleagues* field, select one or more stakeholder, and tap *Next*. As configured in the template, appears in the screen customize the text to suit your needs and tap *Send*.	The request for feedback has been sent.	

4.2.4 Provide Feedback

Purpose

The stakeholder, which basically can be any other employee within the organization, has received the feedback request sent by the employee. He or she provides the feedback to the employee's activities.

If the SAP SuccessFactors Mobile application has been activated on the Stakeholder's mobile device as described in section Activate SAP SuccessFactors Mobile Application (Optional) [page 15], each employee within the organization has the option to provide feedback on activities of a particular employee either on the company instance website or on the mobile device.

These options are detailed below.

4.2.4.1 Provide Feedback on Company Website

Purpose

The stakeholder provides via the company website feedback to the employee's activities.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors** company instance as **Stakeholder**.	The *Home* page is displayed.	
2.	**Access Feedback Request**	On the *Home* page, choose the *You have # to-do items* alert icon from the top right corner of the screen. In the upcoming *To-Do* List side panel, choose the *Feedback Requests* row.	The *Feedback Requests* dialog box is displayed, containing the request for feedback sent by the employee. **i Note** In case you have received feedback requests from several employees, or an employee has sent feedback requests for different activities, the *Feedback Requests* dialog box contains the list of requests.	
3.	**Provide Feedback**	In the *Feedback Requests* dialog box, choose *View Request*. In the upcoming *Requested Feedback* dialog box, enter in the text box of each question your feedback as appropriate. Then choose *Send*. In the upcoming success dialog box, choose *OK*. **i Note** You can also decline the feedback, by choosing *Decline* in the *Requested Feedback* dialog box. Then, choose in the upcoming *Warning* dialog box, *Confirm*. **i Note** In case you have received several feedback requests, proceed in a similar way as described above.	The feedback has been sent. You return to the *Home* page. The feedback is immediately visible for the requesting employee. In addition, the requesting employee receives an appropriate email notification about the existence of feedback. **i Note** In case you have received several feedback requests, you return to the *Feedback Requests* dialog box, in which the number of requests has been reduced by one. **i Note** In case you have received several feedback requests from the same employee, separate emails will be sent out to that employee for each feedback you have provided.	

4.2.4.2 Provide Feedback via Mobile Device (Optional)

Purpose

The stakeholder provides, via his or her mobile device, feedback to the employee's activities.

If the mobile application is not enabled, this option is not available and only option described in Provide Feedback on Company Website [page 38] can be executed.

In this document, we only describe the screen elements of the iOS system.The **SAP SuccessFactors Mobile** application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the *SAP SuccessFactors* mobile app and log on as **Stakeholder** by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2.	**Access Write Feedback Page**	Go to the *To-Do* tab and tap *Provide Feedback*.	The *Write Feedback* screen is displayed.	
3.	**Provide Feedback**	Write your feedback in the *Write your feedback* blank box on the bottom of screen and tap *Send* on the top right corner.	The feedback has been sent. You return to the *To-Do* page. The feedback is immediately visible for the requesting employee and his or her manager.	

4.2.5 View Feedback

Purpose

The employee has received upon request feedback from stakeholders to his or her activities so far. The Employee now checks this feedback.

If the SAP SuccessFactors Mobile application has been activated on the Employee's mobile device as described in section Activate SAP SuccessFactors Mobile Application (Optional) [page 15], the employee has the option to view this feedback either on the company instance website or on the mobile device.

These options are detailed below.

4.2.5.1 View Feedback on Company Website

Purpose

The Employee checks on the company website the feedback from the stakeholders about his or her activities so far.

Procedure

> **Note**
>
> Instead of following the procedure as described below, you can choose in the email notifying you about the feedback received the given hyperlink. You need to enter your login data and are progressed to the detailed feedback.

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors** Company Instance as **Employee**.	The *Home* page is displayed.	
2.	**Access Feedback Page**	You have several options to access the *Feedback* page: **Option 1**: Choose *Home* › *Continuous Feedback* from the menu in the top left corner. **Option 2**: Choose *Home* › *Continuous Performance* from the menu in the top left corner. On the *My Activities with <manager name>* page, choose the activity for which you have requested feedback. On the upcoming *Activities / Activity Details / <activity name>* page, choose the *View Feedback Received (#)* link below the *Feedback Received* field.	The *Feedback page* › *Feedback Received* tab is displayed, on which each feedback you have received so far is displayed in an own quick card.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**View Activity Feedback**	On the *Feedback Received* tab, choose in the quick card of interest the *View more* link.	The *Feedback Details* page is displayed.	
		View the detailed feedback. If wanted, you can make the feedback visible to your manager, by moving the slide button to *Yes*.	The feedback provided by the stakeholder has been reviewed.	

> **i Note**
>
> On the *Feedback* page you can also check the requests you have sent and the feedback you have given to other employees upon their requests.

4.2.5.2 View Feedback via Mobile Device (Optional)

Purpose

The Employee checks on his or her mobile device the feedback from the stakeholders about his or her activities so far.

If the mobile application is not enabled, this option is not available and only option described in View Feedback from Stakeholders on Company Website can be executed.

In this document, we only describe the screen elements of the iOS system. The SAP SuccessFactors Mobile application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the **SAP SuccessFactors** mobile app and log on as **Stakeholder** by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2	**Access Write Feedback Page**	Go to the *More* tab and tap *Feedback*.	The *Feedback* screen is displayed.	
3.	**View Feedback**	Tap the *<employee name>* under *Received Feedback* to check the feedback.	The feedback has been displayed.	

4.2.6 Add Topics for 1:1 Meeting

Purpose

The Employee prepares some topics to talk with his or her manager during their next 1:1 meeting. This might be needed, for example, because the Employee needs support in completing activities.

Also, the Manager can prepare topics he or she wants to discuss with the employee.

If the SAP SuccessFactors Mobile application has been activated on the mobile devices of all employees as described in section Activate SAP SuccessFactors Mobile Application (Optional) [page 15], they have the option to add topics to be discussed in the meeting either on the companyinstance website or on the mobile device.

These options are detailed below.

> → Recommendation
>
> We recommend that a minimum of a quarterly conversation is essential between Manager and Employee in the Continuous Performance Management.

4.2.6.1 Add Topics for 1:1 Meeting on Company Website

Purpose

The Employee and possibly his or her Manager add on the company website the topics to be discussed during the next 1:1 meeting.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to **SAP SuccessFactors** Company Instance as *Employee* or as *Manager*.	The *Home* page is displayed.	
2.	**Access Continuous Performance module**	Choose *Home* > *Continuous Performance* from the menu on the top left corner.	The *Continuous Performance* screen is displayed. On the left part of the screen, the *Active Channels* are listed.	
3.	**Add Topics to be Discussed in Meeting**	As an **Employee**, choose in the top right corner of the *My Activities with <manager name>* part of the screen, *Start Meeting*. In the upcoming *Meeting with <manager name> on <date>* page, enter topics for the meeting in the *Discussion Topics* text box and choose *Add*. As the employee's *Manager*, select in the *Active Channels* part of the screen the name of the direct report, with whom you want to schedule a meeting. Choose in the top right corner of the *Activities for <employee name>* part of the screen, *Start Meeting*. In the upcoming *Meeting with < employee name> on <date>* page, enter topics for the meeting in the *Discussion Topics* text box and choose *Add*.		

4.2.6.2 Add Topics for 1:1 Meeting via Mobile Device (Optional)

Purpose

The Employee and possibly his or her Manager can add via the mobile device topics to be discussed during the next 1:1 meeting.

If the mobile application is not enabled, this option is not available and only the option described in Add Topics for 1:1 Meeting on Company Website [page 43] can be executed.

In this document, we only describe the screen elements of the iOS system. The SAP SuccessFactors Mobile application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the **SAP SuccessFactors** mobile app and log on as *Employee* by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2.	**Add Topics to be Discussed in Meeting**	In the *My Activities* tile, tap the *three dot* icon and choose *Start Meeting*. In the upcoming *Meeting with <manager name>* page, tap *Discussion Topics* and enter topics for the meeting by tapping *Create Topic*. Choose *Done* to save the topic.	The topic has been chosen.	

4.2.7 Conduct 1:1 Meeting (Process Step Outside Software)

Purpose

The manager and employee have a 1:1 meeting to communicate with each other about the topic(s) prepared in process step Add Topics for 1:1 Meeting [page 43] by the employee and manager, respectively.

Procedure

This process step is executed outside of the software.

4.2.8 Confirm 1:1 Meeting

Purpose

Once the 1:1 meeting between the employee and his or her manager has been completed, the employee confirms the topics have been discussed during the meeting and archives the meeting.

All meetings should be captured in the system; if at any time in the future the content of the meeting or the points of discussion need to be revisited, this can be easily done. Continuous Performance Management [page 29] takes a snapshot of the content from the meeting as it appeared during the discussion. Capturing the meeting also confirms that the meeting occurred.

If the **SAP SuccessFactors Mobile** application has been activated on the Employee's mobile devices as described in section Activate SAP SuccessFactors Mobile Application (Optional) [page 15], they have the option to confirm the meeting either on the company instance website or on the mobile device.

These options are detailed below.

→ Recommendation

We recommend that a minimum of a quarterly conversation is essential between Manager and Employee in the Continuous Performance Management.

4.2.8.1 Confirm 1:1 Meeting on Company Website

Purpose

The employee confirms on the company website the topics discussed during a particular 1:1 meeting and archives that meeting.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Employee**.	The *Home* page is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Access Continuous Performance module**	Choose *Home* > *Continuous Performance* from the menu on the top left corner.	The *Continuous Performance* screen is displayed. On the left part of the screen, the Active Channels are listed.	
3.	**Select Meeting**	In the *My Activities with <manager name>* part of the screen, choose *Start Meeting* in the top right corner. In the upcoming *Meeting with <manager name> on <date>* page, the topics prepared for the meeting are listed.		
4.	**Confirm Discussed Topics**	Flag the check box ahead of the topics that have been discussed during the 1:1 meeting.	The topic is strikethrough and the success message `Discussion topic closed` is issued by the system.	
5.	**Complete Meeting**	Choose *Save and Finish*. In the upcoming *Save to Meeting History?* dialog box, you are informed that upon saving, the meeting will be archived and cannot be edited anymore. Choose *Save*.	The 1:1 meeting has been completed and has been moved to *Meeting History*.	

Saving the meeting also confirms that the meeting occurred. All the meetings, which took place so far, can be viewed by choosing the *Meeting History* and selecting the meeting of interest.

4.2.8.2 Confirm 1:1 Meeting via Mobile Device (Optional)

Purpose

The employee confirms the topics discussed during a particular 1:1 meeting and archives that meeting via the mobile device.

If the mobile application is not enabled, this option is not available and only the option described in Confirm 1:1 Meeting on Company Website [page 46] can be executed.

In this document, we only describe the screen elements of the iOS system. The *SAP SuccessFactors Mobile* application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the *SAP SuccessFactors* mobile app and log on as **Employee** by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2.	**Select Meeting**	In the *My Activities* tile, tap the *three dot* icon and choose *Start Meeting* a topic you need to confirm.	The topic has been chosen.	
3.	**Save and Finish Meeting**	In the upcoming *Meeting with <manager name>* page, tap the *Discussion Topics* and flag the check box ahead of the topic name to close the topic. Then tap *Meeting* to go back to the *Meeting* page. Tap the *three dot* icon and choose *Save and Finish*. In the upcoming *Save to Meeting History* message box, tap *Save* to confirm it.	The topic has been confirmed.	

Saving the meeting also confirms that the meeting occurred. Thus, each time you log into the SAP SuccessFactors application, you will see the number of days since your last 1:1 meeting.

In the *Meeting History* section, you can see all the captured meetings.

4.2.9 Maintain My Achievement

Purpose

The Employee captures his or her achievements in real-time. For this, the employee uses the *Achievements* view, which lets him or her quickly and easily capture the things achieved at the workplace and link them with relevant activities.

If the SAP SuccessFactors Mobile application has been activated on the Employee's mobile device as described in section Activate SAP SuccessFactors Mobile Application (Optional) [page 15], the employee has the option to maintain the achievements either on the company instance website or on the mobile device.

These options are detailed below.

4.2.9.1 Maintain My Achievement on Company Website

Purpose

The Employee maintains on the company website the achievements reached so far.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company Instance as **Employee**.	The *Home* page is displayed.	
2.	**Access Continuous Performance module**	Choose *Home* > *Continuous Performance* from the menu in the top left corner.	The *Continuous Performance* > *My Activities with <manager name>* screen is displayed. On the left part of the screen, the *Active Channels* are listed.	
3.	**Add Achievement to Activity**	Choose the activity which you have achieved. On the *Activities/Activity Details / <activity>* page, choose *Edit* at the top right corner of the screen. In the upcoming *Edit Activity* dialog box, set the *Status* to *Completed*, and flag the *Mark as an achievement* checkbox. Set the *Achieved On* date as appropriate. Then choose *Save*. In the upcoming *Success* message box, choose *OK*.	A new achievement has been added. The activity has moved to the *Status > Completed* tile.	
4.	**View Achievement**	On the *My Activities with <manager name>* page, choose *Achievements* in the top right corner of the screen. Select the achievement and view details.	The *Achievements* page is displayed, containing all your achievements so far.	

4.2.9.2 Maintain My Achievement via Mobile Device (Optional)

Purpose

Employee maintains, via his or her mobile device, the achievements reached so far.

If the mobile application is not enabled, this option is not available and only the option described in Maintain My Achievement on Company Website [page 49] can be executed.

In this document, we only describe the screen elements of the iOS system. The SAP SuccessFactors Mobile application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the **SAP SuccessFactors** mobile app and log on as *Employee* by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2.	**Maintain Achievements**	Tap the *Status* and choose *Completed*, then turn *Mark as an Achievement* on. Tap *Activity Details* to go back to the *Activity Details* page.	The new achievement has been added.	

4.2.10 Maintain Employee Achievements

Purpose

The manager can review the achievements a direct report has reached so far in his or her work.The achievements have been maintained by the employee him-/herself firstly.

If the SAP SuccessFactors Mobile application has been activated on the Manager’s mobile device as described in section Prerequisites [page 5], the manager has the option to maintain achievements either on the company instance website or on the mobile device.

These options are detailed below.

4.2.10.1 Maintain Employee Achievements on Company Website

Purpose

The manager reviews on the company website achievements of a direct report.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company Instance as **Manager**.	The *Home* page is displayed.	
2.	**Access Continuous Performance module**	Choose *Home* > *Continuous Performance* from the menu on the top left corner. On the upcoming *Continuous Performance* screen, select in the *Active Channels* part of the screen, the direct report whose achievements you want to view. **Note** Alternatively, you can choose on the *Home* page, in the *Quick Actions* section, the *My Team* card. In the upcoming *My Team* dialog box, select on the left side your direct report for whom you want to review the achievement. The chosen employee displays in the right part of the dialog box. Choose *Go To*, and from the dropdown that expands choose *Activities*.	The *Continuous Performance* screen is displayed. On the left part of the screen, the *Active Channels* are listed. On the right part of the screen, the *Activities for <employee name>* page is displayed, containing the activities defined for the selected employee. The already completed activities are displayed in the *View by Status* tab *> Status / Completed (#)* tile.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Review Achievements of Employee**	In the top right corner of the *Activities for <employee name>* page, choose *Achievements*. Choose the appropriate achievement quick card and review the achievements of the employee. i Note You can edit or delete any achievement from the employee's list. To edit an achievement, choose *Edit*. In the upcoming *Edit Achievement* dialog box, maintain the information that you want to change. Then choose *Save*. To delete an achievement, choose *Delete* and in the upcoming message dialog box, choose again *Delete*.	The achievements reached so far by the direct report have been reviewed.	

4.2.10.2 Maintain Employee Achievements via Mobile Device (Optional)

Purpose

The manager reviews the achievements of a direct report via his or her mobile device.

> i Note
>
> If the mobile application is not enabled, this option is not available and only the option described in Maintain Employee Achievements on Company Website [page 51] can be executed.

In this document, we only describe the screen elements of the iOS system. The SAP SuccessFactors Mobile application also supports the Android platform, while the Android interface might be a little bit different.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the **SAP SuccessFactors** mobile app and log on as *Manager* by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2.	**Access Activity Page**	Go to the *Team* tab and tap the direct report whose achievements you want to view.	The *Employee Continuous Performance Management* screen is displayed.	
3.	**Maintain Ach-ievements for Employee**	On the next screen, tap *Activities* and choose the activity which you want to maintain the achievement. Tap *Status* and choose *Completed*, then turn *Mark as an Achievement* on. Tap *Activity Details* to go back to the *Activity Details* page.	A new achievement has been maintained.	

4.2.11 Update My Goal Plan (Optional)

Purpose

If during the continuous performance review process, changes or improvements of the employee's goals arise, possible updates to the employee's goal plan need to be done.

Procedure

Execute the appropriate steps as described in process step Prerequisites [page 5].

4.3 Performance Management

Purpose

At the end of the performance cycle, the employees summarize their performance by means of self-assessment on their goal achievements and competencies. The line managers also review the employees' goal achievements and competencies and provide performance ratings. In a calibration session with the HR Business Partner and the Next Level Manager, the employees' ratings are calibrated, after which the line manager engages in review discussions with each of his or her direct reports.

The process steps to achieve this are detailed below.

4.3.1 Launch Performance Review Forms

Purpose

The Talent Administrator schedules the mass form launch of performance review forms for the entire organization or individual employees.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company Instance as **Talent Administrator**.	The *Home* page is displayed.	
2.	**Access Admin Center**	Choose *Home* > *Admin Center* from the menu in the top left corner.	The *Admin Center* screen is displayed.	
3.	**Access Launch Forms**	Choose *Performance Management* > *Launch Forms* from the *Company Processes & Cycles* portlet.	The *Launch Forms* dialog box is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Select Form Template**	On the *Launch Forms* dialog box make following entries: *Type*: **`Performance Management`** *Form Template*: Choose the performance review form template you have created in preliminary step **Prepare Performance Review Template**. Choose *Next*.	You are directed to the *Launch Date* tab.	
5.	**Select Launch Date**	On the *Launch Date* tab, choose the date the forms launch and then choose *Next*.	You are directed to the *Review Period* tab.	
6.	**Define Review Period**	On the *Review Period* tab, choose the period for performance review and then choose *Next*.	You are directed to the *Select Employees* tab.	
7.	**Select Employees**	On the *Select Employees* tab, select employees for whom performance review should be executed: you can choose to select all active employees, select employees by name, or select group of employees. Then choose *Next*.	You are directed to the *Summary* tab.	
8.	**Launch Form**	OIn the *Summary* tab, check the settings you have made and make changes if necessary, and then choose *Launch*. In the upcoming dialog box, confirm the displayed message by choosing *OK*.	You are directed to the *Done* tab, having a message showing the launching status, like `Form(s)` creation is in progress. Forms have been scheduled or launched.	
9.	**Confirm Launching Status**	In the *Done* tab, choose *Close*.	The **Performance Review** form has been created for the employee and can be found by the same on his or her *Home* page.	

i Note

If the Talent Administrator has completed the step of launching the performance review form for an employee, the line manager and the employee in route map can be reminded directly via email. For this, the Send email notifications to form recipients checkbox at the bottom of *Summary* tab needs to be flagged. Then the line manager can arrange meetings with employees to discuss and agree on stakeholders to involve for feedback.

4.3.2 Request Employee Performance Evaluation from Raters (Optional)

Purpose

The Manager can ask raters to give feedback on the performance of his or her direct report(s).

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company Instance as **Manager**.	The *Home* page is displayed.	
2.	**Access Performance module**	Choose *Home* > *Performance* from the menu in the top left corner.	The *My Forms* screen is displayed.	
3.	**Ask for Feedback from Raters**	Choose the *Team Overview* tab. On the *Team Overview* screen, choose in the *Feedback from Others* column, next to the employee's name for whom you want to request feedback, *Ask for Feedback*. In the *Ask for Feedback about <employee name>* dialog box, you can either select a rater from the recommended list or enter in the *Add existing employee* search box, the names of the internal raters and select them. Then choose *Send email* to notice the raters to give feedback on the employee's performance.	The email notifications about the requested feedback on the employee's performance are sent to raters.	

4.3.3 Provide Feedback on Employee Performance (Optional) (Process Step Outside Software)

Purpose

The Rater has received an email notification, in which he or she is asked to provide feedback on the employee's performance. The rater can give feedback directly via email.

Procedure

Access your Email account, select the appropriate email having as subject something like **`Performance Feedback request for <employee name>`**, and reply to it giving your feedback on the employee's performance.

Result

Your feedback will be visible for the manager in the company instance.

4.3.4 Perform Self-Evaluation

Purpose

The Employee performs the self-evaluation of his or her performance.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Employee**.	The *Home* page is displayed.	
2.	**Access Performance Review Form**	You can access the form as follows: **Option 1**: Choose *Home* > *Performance* from the menu on the top left corner. On the *My Forms* screen, go to the *Inbox* and choose the appropriate form by choosing in the *Form Title* column the form name **`<year> Performance Review for <employee name>`**. **Option 2**: On the *Home* page, choose the *You have # to-do items* alert icon from the top right corner in the screen. In the upcoming *To-Do* List side panel, choose the *Review Performance* row. In the *Review Performance* dialog box, choose the Employee *Self Evaluation* hyperlink for your **`<name>`**.	Your performance review form is displayed.	
3.	**Perform Self-Evaluation**	Select ratings and, if appropriate, add comments for each goal and competency. **Note** Make sure the weight of total goals is added up to 100%. Otherwise, the form will not progress to the next step. When done, choose the *Send to Manager*. On the next screen, enter a comment in the *Email Notification Comments* text box if appropriate, and then choose *Send to Manager* to confirm.	You have performed your self-evaluation. The form has been sent to your manager. In addition, your manager receives an appropriate email notification about the form being now in his or her inbox. The form has disappeared from your inbox; it is now in the *In Progress* > *En Route* folder.	

4.3.5 Review Feedback on Employee Performance from Raters (Optional)

Purpose

The Manager can check the feedback provided by the raters on the employee's performance. The manager can take this as a reference for the final performance evaluation.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Manager**.	The *Home* page is displayed.	
2.	**Access Performance module**	Choose *Home* > *Performance* from the menu in the top left corner.	The *My Forms* screen is displayed.	
3.	**Review Feedback from Raters**	PProceed with one of the following options: **Option 1**: Choose the *Team Overview* tab. On the *Team Overview* screen, choose in the *Feedback from Others* column next to employee's name the *<rater name> has provided feedback* icon. The *Feedback about <employee name>* dialog box is displayed, where you can review the feedback provided by the rater. When done, choose *X (Close)*. **Option 2**: Choose the *Reviews* tab. Go to the *Inbox* and choose in the *Form Title* column the appropriate form by choosing the form name **`<year> Performance Review for <employee name>`**. On the appropriate form, choose the *Supporting* box on the top right corner of the screen. The *Supporting* dialog box is displayed and you can review the feedback provided by the rater(s). When done, choose *X (Close)*.	The feedbacks from raters on the employee's performance have been reviewed..	

4.3.6 Rate and Compare Employees Competencies (Optional)

Purpose

Stack ranker allows the Manager to compare and rate the competencies of all his or her subordinated employees in one page.

> **i Note**
>
> The main purpose of stack ranker is helping managers rate and comment their subordinated employees easier, but the manager does not necessarily need to use it. Normally stack ranker is for core competencies only and not for goals and job-specific and custom competencies as these are various according to different role of individuals.

Prerequisites

To use stack ranker for multiple employees, the performance review forms of these employees, containing their self-evaluation, must be available in the manager's form inbox.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* instance as **Manager**.	The SAP SuccessFactors *Home* page is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Access Performance Review Form**	You can access the form as follows: **Option 1**: Choose *Home* > *Performance* from the menu on the top left corner. On the *My Forms* screen, go to the *Inbox* and choose the appropriate form by choosing in the *Form Title* column the form name **`<year> Performance Review for <employee name>`**. **Option 2**: On the *Home* page, choose the *You have # to-do items* alert icon from the top right corner in the screen. In the upcoming *To-Do* List side panel, choose the *Review Performance* row. In the *Review Performance* dialog box, choose the *Manager Review* hyperlink for the appropriate *<employee name>*.	The performance review form for this employee is displayed.	
3.	**Access Team Rater**	Choose the *Team Overview* tab at the top of the screen, select appropriate **`<Performance Template>`**, and then choose *Team Rater* in the top right corner of the screen.	The Performance Review Core Competencies screen is displayed.	
4.	**Rate or Comment Employees' Competencies**	Select the rating for employee's competencies or add some comments. When finished, choose *I'm Done*.	You have rated or commented on the competencies of your direct reports.	

4.3.7 Review Employee Performance

Purpose

The Manager officially rates the performance of his or her subordinated employee.

> **i Note**
>
> Official rating means that the employee's self-rating does not affect the final score, but it is only a reference to the manager. The rating performed by the manager gives the final score of the employee's performance.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Manager**.	The *Home* page is displayed.	
2.	**Access Performance Review Form**	You can access the form as follows: **Option 1**: Choose *Home* › *Performance* from the menu on the top left corner. On the *My Forms* screen, go to the *Inbox* and choose in the *Form Title* column the appropriate form by choosing the form name **`<year> Performance Review for <employee name>`**. **Option 2**: On the *Home* page, choose the *You have # to-do* items alert icon from the top right corner in the screen. In the upcoming *To-Do* List side panel, choose the *Review Performance* row. In the *Review Performance* dialog box, choose the *Manager Review* hyperlink for the appropriate **`<employee name>`**.	The performance review form for this employee is displayed.	
3.	**Evaluate Employee's Performance**	Select ratings and, if appropriate, add comments for each goal and competency. In the *Summary* section, enter a value for the *Overall Performance Rating*. When done, choose *Send to Calibration*. On the next screen, enter a comment in the *Email Notification Comments* text box if appropriate, and then choose *Send to Calibration* to confirm.	The evaluation of the employee's performance has been done. The form is sent to the HR Business Partner. In addition, the HR Business Partner receives an appropriate email notification about the form being now in his or her inbox. The form has disappeared from your inbox; it is now in the *In Progress* › *En Route* folder with step **`Calibration`**.	

4.3.8 Create Calibration Session

Purpose

The Talent Administrator creates a calibration session, which defines the basic information of the calibration process.

Prerequisites

The forms of all subjects participating at calibration must be in step **`Calibration`** in the route map.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Talent Administrator**.	The *Home* page is displayed.	
2.	**Access Admin Center**	Choose *Home* > *Admin Center* from the menu on the top left corner.	The *Admin Center* is displayed.	
3.	**Access Calibration Session**	Choose *Calibration* > *Manage Calibration Sessions* from the *Company Processes & Cycles* portlet.	The *Manage Calibration Sessions* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Create Calibration Session**	Choose *Create New*. On the upcoming screen make following entries: On the *Basic Info* tab • *Template*: **`<Calibration Template>`** • *Session Name*: **`<Calibration Session name>`** • *Session Owners*: **`<name of HR Business Partner>`** • *Session Facilitators*: **`<name of HR Business Partner>`** On the *People* tab Use *Search* on the left side of the screen to select people. In the *Search Results* table in the middle of the screen, flag the checkbox next to the relevant person and use *Actions* to add people into participants or subjects role. The *Subject* is the employee being calibrated, whereas the *Participant* is the person performing the calibration, such as manager and second level manager. Choose *Save*. On the *Validation* tab If the validation is successful, choose *Activate*. In the *Activate* dialog box, choose *Yes* to confirm.	The *Session activated* dialog box is displayed, informing you that the calibration session has been activated successfully.	
5.	**Send Notification about Calibration Session Activation (Optional)**	**Option 1**: In case an email notification about the session activation should be sent out to the session owner, session facilitators, and participants, leave the *Send notification about session activation* checkbox flagged. Check that all persons, to whom you want to send the notification, are listed in the Send to text box. The *Email Subject* and *Message* text are suggested; accept them or adapt them as appropriate. Choose *OK*. **Option 2**: In case no email notifications should be sent out, unflag the *Send notification about session activation* checkbox and choose *OK*.	The Session Activated dialog box is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
6.	**Close Dialog Box**	Choose *OK* to close the *Session Activated* dialog box.	You return to the *Manage Calibration Sessions* screen. The newly created calibration session has status **`In Progress`**.	

4.3.9 Calibrate Employee Performance Rating

Purpose

The HR Business Partner calibrates the employee's performance rating. This is done during a meeting with the line manager and next level manager of the employee, in which they discuss the performance score for the employee and give the final score about the employee's performance.

Prerequisites

The forms of all subjects participating at calibration must be in step **`Calibration`** in the route map.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company Instance as **HR Business Partner**.	The *Home* page is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Calibrate Employee Performance Data**	The *Session List > <Calibration Session name>* screen has multiple tabs to view the relevant data. Choose the *LIST VIEW* tab. Rate the potential and performance of the employee by selecting an appropriate value from the dropdown list. Choose *Save*.	The employee's performance data has been calibrated. The read-only value in the *Calibration* column is calculated based on the selected ratings and the employee is moved automatically into the updated ranking in the performance matrix view (*CALIBRATION* tab).	
3.	**Finalize Calibration Process**	Once done, choose *Finalize*. In the upcoming *Finalize Session* dialog box, choose *Yes*. In the *Session Finalized* dialog box, you can choose to send email notifications about the session finalization to the session owner, session facilitators, and participants. For this, leave the *Send notification about session finalization* checkbox flagged. Check that all persons, to whom you want to send the notification are listed in the *Send to* text box. The *Email Subject* and *Message* text are suggested; accept them or adapt them as appropriate. Choose *OK*. In the upcoming *Success* dialog box, choose *OK* to confirm. **i Note** In case no email notifications should be sent out, unflag the *Send notification about session finalization* checkbox and choose *OK*. You return to the *Session List /<Calibration Session name>* page.	The calibration process has been finalized. The form has been sent to the employee's manager for approval. In addition, the manager receives an appropriate email notification.	

4.3.10 Finalize Year-End Review Prior to Communication

Purpose

The Manager finalizes the year-end review of the employee prior communicating the decision to the employee.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Manager**.	The *Home* page is displayed.	
2.	**Access Performance Review Form**	You can access the form as follows: **Option 1**: Choose *Home* > *Performance* from the menu on the top left corner. On the *My Forms* screen, go to the *Inbox* and choose in the *Form Title* column the appropriate form by choosing the form name **`<year> Performance Review for <employee name>`**. **Option 2**: On the *Home* page, choose the *You have # to-do items* alert icon from the top right corner in the screen. In the upcoming *To-Do* List side panel, choose the *Review Performance* row. In the *Review Performance* dialog box, choose the *Performance Review Discussion* hyperlink for the appropriate **`<employee name>`**.	The performance review form for this employee is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Complete Year-End Review**	On the form, finalize the comments and choose *Send to Employee* on the bottom of the screen. On the new screen, enter a comment in the *Email Notification Comments* text box if appropriate, then choose *Send to Employee* to confirm.	The manager has finalized the performance review of his or her direct report and will communicate this result to the employee. The form is sent to the employee. In addition, the employee receives an appropriate email notification about the form being now in his or her inbox for signing. The form has disappeared from your inbox; it is now in the *In Progress* > *En Route* folder with step **`Employee Signature`**.	

4.3.11 Conduct Year-End Performance Review Meeting (Process Step Outside Software)

Purpose

The Manager organizes a 1: 1 meeting with the employee to discuss the final performance result.

Procedure

This process step is executed outside of the software.

4.3.12 Sign My Performance Review Form

Purpose

After the year-end review meeting with the manager has taken place, the Employee signs his or her performance review form.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to the *SAP SuccessFactors* company instance as **Employee**.	The *Home* page is displayed.	
2.	**Access Performance Review Form**	You can access the form as follows: **Option 1**: Choose *Home* › *Performance* from the menu on the top left corner. On the *My Forms* screen, go to the *Inbox* and choose in the *Form Title* column the appropriate form by choosing the form name **`<year> Performance Review for <employee name>`**. **Option 2**: On the *Home* page, choose the *You have # to-do items* alert icon from the top right corner in the screen. In the upcoming *To-Do* List side panel, choose the *Review Performance* row. In the *Review Performance* dialog box, choose the *Employee Signature* hyperlink for the appropriate **`<employee name>`**.	Your performance review form is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Add Electronic Signature**	Choose *Sign* at the bottom of the screen. On the next screen, enter a comment in the *Email Notification Comments* text box, if appropriate, and then choose *Sign* to complete the form.	The form has been signed and has been moved to the *In Progress* › *En Route* folder with step **`Manager Signature`** folder. The form is sent to your manager. In addition, the manager receives an appropriate email notification about the form being now in his or her inbox for signing. The annual performance review is completed from the employee's point of view.	

4.3.13 Sign Employee Performance Review Form

Purpose

After the employee signs his or her performance review form, the manager signs the performance review form of the employee as well.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to the *SAP SuccessFactors* Company Instance as **Manager**.	The *Home* page is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Access Performance Review Form**	You can access the form as follows: **Option 1**: Choose *Home* > *Performance* from the menu on the top left corner. On the *My Forms* screen, go to the *Inbox* and choose in the *Form Title* column the appropriate form by choosing the form name **`<year> Performance Review for <employee name>`**. **Option 2**: On the *Home* page, choose the *You have # to-do items* alert icon from the top right corner in the screen. In the upcoming *To-Do* List side panel, choose the *Review Performance* row. In the *Review Performance* dialog box, choose the *Manager Signature* hyperlink for the appropriate *<employee name>*.	Your performance review form is displayed.	
3.	**Add Electronic Signature**	Choose *Sign* at the bottom of the screen. On the next screen, choose *Sign* to complete the form.	The form has been signed and has been moved to the *Completed* > *Un-Filed* folder. The annual performance review is completed.	

> **Note**
>
> The employee receives an email, notifying him or her, that the performance review is completed. The employee can find the final version of the document in the *My Forms* > *Completed* > *Un-Filed* folder.

4.4 360 Degree Review (Optional)

Purpose

The 360 Degree Review is used to collect feedback on an employee's competencies from peers, line manager, subordinated employees, and so on. This review should identify strengths and weaknesses as basis for development planning.

The process steps to achieve this are detailed below.

4.4.1 Create 360 Degree Review Form for Self

Purpose

To start the 360 degree review process, the employee creates the 360 degree review form for him- or herself.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Employee**.	The *Home* page is displayed.	
2.	**Access Performance module**	Choose *Home* > *Performance* from the menu in the top left corner.	The *My Forms* screen is displayed.	
3.	**Create Form**	Choose *Create New Form*. On the *Select one of the form types below to begin* page, choose the *360 Review* link. On the *Choose the subject from ones listed below* page, choose **`Self-<employee name>`**. On the *Please provide review periods and due date in the fields below* page, accept the suggested dates or adapt them as appropriate. Choose Create and Open.	You are directed to the screen where you can nominate raters. Nevertheless, you can do this later on, as the form will be available on your *Home* page. **Note** In the present document, we consider that the employee nominates raters at a later point in time.	
4.	**Save Form**	Choose *Save and Close*.		

4.4.2 Nominate Raters

Purpose

The Employee nominates the raters, who should evaluate him or her. The Employee adds rater to or removes raters from the pre-generated rater list. When done, the employee sends the 360 review form to his or her line manager to approve the rater list.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors Company* instance as **Employee**.	The *Home* page is displayed.	
2.	**Access Form**	You can access the form as follows: **Option 1**: Choose *Home* › *Performance* from the menu on the top left corner. On the *My Forms* screen, go to the *Inbox* and choose the appropriate form by choosing the form name **`360 Review for <employee name>`**, which is in route map step *Employee Selects Participants*. **Option 2:** On the *Home* page, in the *For You Today* section, choose in the *Complete 360 Evaluation* › *Employee Selects Participants* card the *Go to Form* link. ℹ Note In case you are involved in several 360 degree reviews, for example as rater, the *View All* link will be displayed in the *Complete 360 Evaluation* card. Choose that link; a dialog box containing *Complete 360 Evaluation* cards for each employee will display. Choose the Go to Form link in the appropriate *Complete 360 Evaluation* › *Employee Selects Participants* card .	The *360 Review for <employee name>* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Modify Rater List**	In the *RATER LIST* section, check the raters currently listed. To **add a participant**, choose *+ Add Participants*. In the *Add Participants* dialog box, depending if the rater is an employee within the company or and external participant, proceed as follows: • for an internal rater, enter the rater's name in the *Find a User* field and choose the employee directly. • If the rater is an external participant, type Add into the *Find a User* field and choose *Add a new external participant*. On the *Add a New External Participant* dialog box, enter the rater's *Email*, *First Name* and *Last Name*, then choose *Add*. For both internal and external raters, select in the *Category* column an appropriate value from the drop-down list and choose *Add to List*. To **delete a participant**, choose from the *Action* column the *Delete* icon within the rater's line. In the *Confirmation* dialog box, choose *OK*. ⚠ Caution Make sure to have chosen at least 5 participants for your 360 degree review! Otherwise, an error message is issued, and you cannot send the rater list for approval!	You have added raters to or deleted raters from your rater list.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Send to Next Processor**	Choose *Send to Next Step*. In the upcoming *Confirmation* dialog box, you can enter a comment in the *Email Notification Comments* text box, if appropriate. Confirm by choosing *Send to Next Step*.	You have nominated the raters for your 360 review. The form has been sent to your manager for approval. In addition, your manager receives an appropriate email notification about the approval needed for the rater list suggested. The form has disappeared from your inbox; it is now in the *In Progress* > *En Route* folder, having step **`Manager Approves Participants`**.	

Note

In case email is configured and the email address of the employee's manager is maintained in the system, he or she receives an automatic email about the approval needed for the rater list suggested by the direct report.

4.4.3 Process Employee Rater List

Purpose

The Manager receives the employee's 360 degree review form and adjusts the rater list if necessary. Then he or she approves the rater list and sends the form to the raters for evaluating the employee.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company instance as **Manager**.	The *Home* page is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Access Form**	You can access the form as follows: **Option 1**: Choose *Home* > *Performance* from the menu on the top left corner. On the *My Forms* screen, go to the *Inbox* and choose the appropriate form by choosing the form name **`360 Review for <employee name>`**, which is in route map step *Manager Approves Participants*. **Option 2**: On the *Home* page, in the *For You Today* section, choose in the *Complete 360 Evaluation* > *Manager Approves Participants* card the *Go to Form* link. **Note** In case you are involved in several 360 degree reviews, the *View All* link will be displayed in the *Complete 360 Evaluation* card. Choose that link; a dialog box containing *Complete 360 Evaluation* cards in various route map steps for each employee will display. Choose the *Go to Form* link in the appropriate *Complete 360 Evaluation* > *Manager Approves Participants* > *<employee name>* card. **Note** You can also choose the hyperlink given in the email notification you received about the approval needed for the rater list suggested by your direct report.	The *360 Review for <employee name>* screen is displayed.	

<table>
<thead>
<tr><th>Test Step #</th><th>Test Step Name</th><th>Instruction</th><th>Expected Result</th><th>Pass / Fail</th></tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Maintain Rater List</td>
<td>In the RATER LIST section, check the raters currently listed.

To add a participant, choose +Add Participants. In the Add Participants dialog box, depending if the rater is an employee within the company or and external participant, proceed as follows:

• for an internal rater, enter the rater’s name in the Find a User field and choose the employee directly.
• If the rater is an external participant, type Add into the Find a User field and choose Add a new external participant. On the Add a New External Participant dialog box, enter the rater’s Email, First Name and Last Name, then choose Add.

For both internal and external raters, select in the Category column an appropriate value from the dropdown list and choose Add to List.

To delete a participant, choose from the Action column the Delete icon within the rater’s line. In the Confirmation dialog box, choose OK.

⚠ Caution

Make sure to have chosen at least 5 participants for your 360 degree review! Otherwise, an error message is issued, and you cannot approve the rater list!</td>
<td>You have added raters to or deleted raters from the rater list.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Approve Rater List</td>
<td>Choose Send to Next Step.

In the upcoming Confirmation dialog box, enter in the Email Notification Comments text box a message to the raters. Then choose Send to Next Step.</td>
<td>You have approved the raters for the 360 review of your direct report. The form has been sent to the raters for evaluation.</td>
<td></td>
</tr>
</tbody>
</table>

i Note

If you do not agree with the list of raters nominated by the employee, you can reject it by choosing *Send to Previous Step*, entering on the next screen, in the *Email Notification Comments* text box, an explanation of your decision and confirming the choice by choosing again *Send to Previous Step*. In this case, the employee needs to nominate again raters and send them to you for approval. For details on adapting the rater list, refer to process step Nominate Raters Nominate Raters [page 73].

4.4.4 Conduct 360 Degree Review

Purpose

Every nominated rater in the rater list checks the 360 degree review form in his or her inbox and gives ratings or feedback on each competency item for the employee to be evaluated.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company instance as **Rater**.	The *Home* page is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Access Form**	You can access the form as follows: **Option 1**: Choose *Home* > *Performance* from the menu on the top left corner. On the *My Forms* screen, go to the *Inbox* and choose the appropriate form by choosing the form name **`360 Review for <employee name>`**, which is in route map step *Provide Feedback*. **Option 2**: On the *Home* page, in the *For You Today* section, choose in the *Complete 360 Evaluation* > *Provide Feedback* card the Go to Form link. i Note In case you are involved in several 360 degree reviews, the *View All* link will be displayed in the *Complete 360 Evaluation* card. Choose that link; a dialog box containing *Complete 360 Evaluation* cards in various route map steps for each employee will display. Choose the *Go to Form* link in the appropriate *Complete 360 Evaluation* > *Provide Feedback* > *<employee name>* card. i Note You can also choose the hyperlink given in the email notification you received about the 360 degree feedback requested.	The *360 Review for <employee name>* screen is displayed.	
3.	**Rate Competency**	In the *COMPETENCY FEEDBACK* section, give rating scores to each of the competency listed in the form by selecting values for the *Rating*. If necessary, enter comments for each competency in the *Comments* text area.	You have given your ratings and comments to each competency of the employee being evaluated.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Submit Form**	Choose *Submit Finished Form*. In the upcoming *Confirmation* dialog box, you can enter a comment in the *Email Notification Comments* text box, if appropriate. Confirm by choosing again *Submit Finished Form*.	You have submitted your feedback for the employee's 360 review. In addition, the rated employee and his or her manager receive appropriate emails about the completion of feedback by the rater(s). The form has disappeared from your inbox; it is now in the *Completed* › *Un-Filed* folder. You cannot change the form anymore.	

> **Note**
>
> The employee's manager can check during the evaluation period the status of the 360 review feedback and send out reminders to the raters, if needed. For this, he or she needs to access the form *360 Review for <employee name>* and choose *Summary View* in the top right corner of the form. Then, in the *EVALUATION SUMMARY* section, the manager needs to choose the *Send Reminder* icon next to the anonymous username, who has not provided feedback yet. In case a reminder should be sent to all participants, the *Send Reminder to All Participants* icon, located in the *EVALUATION SUMMARY* section above the list of participants, should be chosen.

4.4.5 Review Employee Detailed 360 Degree Report

Purpose

The Manager or Employee checks the detailed 360 report to review the analysis on the rating results given by all raters. This result can be referenced in other talent management processes, like Career Development.

> **Note**
>
> The detailed 360 degree report can only be checked as a final version after the 360 review process has been finished, meaning all the raters have given their feedback. Only after all raters perform the 360 degree reviews (see process step Conduct 360 Degree Review [page 79]), the related 360 review form will be moved to the Completed folder and the detailed report can be accessed.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company instance as **Manager** or **Employee**.	The *Home* page is displayed.	
2.	**Access Performance Module**	Choose *Home* > *Performance* from the menu in the top left corner.	The *My Forms* screen is displayed.	
3.	**Access Form**	On the *My Forms* screen, go to the *Completed* folder and choose the appropriate form by choosing in the *Form Title* column the form having name **`360 Review for <employee name>`**.	The *360 Review for <employee name>* screen is displayed.	
4.	**Open Detailed 360 Report**	In the *EVALUATION SUMMARY* section, choose the *Open Detailed 360 Report* hyperlink.	The *Detailed 360 Report of 360 Review* page is displayed.	
5.	**Check 360 Review Result**	Check following information: • How many raters from each rater category gave feedback; • The average feedback results from raters for each competency; • Min / Max rating values for each competency. You can also print or save the report as PDF by choosing Print.	You have reviewed the feedbacks from 360 review raters; this result can be used as reference for further processing, for example, in *Development Goals*.	

5 More Information

5.1 Process Integration

5.1.1 Succeeding Processes

After completing the activities in this test script, you can continue testing the following business process:

Process	Business Condition
Compensation Management in SAP SuccessFactors (FI1) of **SAP Best Practices for SAP SuccessFactors Compensation**	The official performance rating can be used in the compensation module.
Variable Pay Planning in SAP SuccessFactors (FH2) of **SAP Best Practices for SAP SuccessFactors Compensation**	The official performance rating can be used in the variable pay module.
Depending on the successor nomination method used within your company, one of below processes: • *Succession Management in SAP SuccessFactors (3VH)* of **SAP Best Practices for SAP SuccessFactors Succession & Development** • *Succession Management with Non-MDF Position-Based Nomination (3VL)* of **SAP Best Practices for SAP SuccessFactors Succession & Development** • *Succession Management with MDF Position-Based Nomination and Integration to Recruiting (3VJ)* of **SAP Best Practices for SAP SuccessFactors Succession & Development**	The ratings of the employee can be used in the succession module.

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