SAP SuccessFactors

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Implementing and Using Diversity and Inclusion Features in SAP SuccessFactors

THE BEST RUN

Content

1 What is Business Beyond Bias?

You can configure and use your SAP SuccessFactors solutions to reduce biases and embed diversity, inclusion, and equity directly into your HR processes. SAP SuccessFactors technology supports the full range of talent processes for your HR professionals, managers, and employees, but can be leveraged to create talent processes to allow you to detect, prevent, and eliminate influence of bias across all talent decisions you make.

Diversity and inclusion are not new challenges for organizations, but changes in the global workforce and the way we work have pushed diversity from being a philanthropic, nice-to-have component of organizational culture to an economic and business imperative. Despite increased attention and investment in this important area, business leaders are not seeing the long-lasting results they need, and bias is to blame. Unconscious bias can influence every aspect of the talent lifecycle, impeding your diverse talent from accessing the opportunities they need to cultivate long-lasting, satisfying careers with your company.

2 Core HR Processes and Systems

Processes and systems in human resources lay the foundation of inclusiveness.

Core HR processes, such as organizing jobs, tracking employees, and administering payroll and benefits, can enhance or detract efforts to increase gender equity. The main areas to update for gender inclusiveness revolve around employee identification, job structure, and data access.

- Utilize Employee Central localization services that allow you to identify employees in a way that fits with national custom (for example, name fields that differ by country/region, employee ID that follows national guidelines, address format, and so on).

  > **Note**
  >
  > Review configuration and cultural specific information related to an individual country/region in the Country/Region Specifics guide.

- Turn on “name pronunciation” feature in Employee Central.
- Utilize localization services to allow employees to craft their “HR system experience”—configurable languages, time zones, currency, bank info, and so on.
- Utilize Job Profile Builder to determine most important elements of a job.
- Utilize Employee Central data entry and reporting to get the insights you need to inform your diversity strategy (for instance, reporting on gender data, although localization services are needed here as well to ensure you are compliant with legislation in different locations).
- Configure the Employee Profile view to have equity-relevant information. For instance, having a manager able to see in an employee’s snapshot where their salary stands in comparison to the average in their pay grade.
- Utilize contingent workforce labels in Employee Central; bring contingent workforce into the org chart.

Related Information

Implementing and Managing Job Profile Builder

2.1 Salary

2.1.1 HRIS Fields

This lists the mandatory fields for the HRIS elements in the Corporate Data Model. HRIS fields correspond to fields on the UI.

For this HRIS element in the Corporate Data Model...	...this HRIS field is always required:
corporateAddress	country
dynamicRoleAssignment	person
eventReason	event
frequency	annualizationFactor
payComponent	payComponentType
payRange	frequency
wfConfigCC	actorRole actorType context
wfConfigContributor	actorRole actorType context
wfStepApprover	approverRole approverType context

For this HRIS element in the Succession Data Model...	...this HRIS field is always required:
compInfo	currency-code
emailInfo	email-address email-type
employmentInfo	end-date start-date

For this HRIS element in the Succession Data Model...	...this HRIS field is always required:
globalAssignmentInfo	company end-date assignment-type planned-end-date
imInfo	im-id
jobInfo	job-code company business-unit
jobRelationsInfo	relationship-type rel-user-id
nationalIdCard	card-type national-id isPrimary country
payComponentNonRecurring	pay-component-code value pay-date
payComponentRecurring	pay-component frequency paycompvalue
personalInfo	first-name last-name
personRelationshipInfo	relationship-type
phoneInfo	phone-type phone-number
workPermitInfo	issue-date

Related Information

Data Model Field Information for Employee Central

2.1.2 User Permissions for Employee Central

You can use role-based permissions (RBP) to control access to who sees what with regard to what users can see and do in the system.

The cards seen by users in the employee profile are directly related to permissions and roles granted to those users.

The permission categories are divided in *User Permissions* and *Admin Permissions*, which are further subdivided, for example, *Employee Data* or *Miscellaneous Permissions* . Once selected, the list of permissions associated with this category is displayed on the right side and in some areas, further divided into groups. For example, the *HR Information* section contains groupings, for example, for *Biographical Information*.

Here is a list of the user permission categories.

Permission Category	Sections Relevant for Employee Central
Employee Data	• *HR Information* • *Employment Details* • *Global Assignment Details* Only available if you have activated global assignments in the Admin Center. • *Pension Payout Details* Only available if you have activated pension payouts in the Admin Center. • *HR Actions* • *Future Dated Transaction Alert* • *Transactions Pending Approval* • *View Workflow Approval History* • *Pay Component Groups* • *Pay Components*
Employee Central Effective-Dated Entities	Set field-level permissions for effective-dated cards and fields. These cards are effective dated: • Addresses • Compensation Information • Dependents • Job Information • Job Relationships • Personal Information
Employee Views	Allows users to view the sections in People Profile. Each item under the Employee Views Section permission corresponds to a section in People Profile. An item is automatically listed under the permission category after you create a section.

Related Information

List of Role-Based Permissions

2.1.2.1 What Is Payment Information?

The MDF-based Payment Information on the Personal Information page allows HR administrators and employees to maintain the complete set of payment information in an effective-dated manner and per employment (for example, global assignments). In addition, it enables HR administrators and employees to maintain one main bank account as default for all kinds of payments (such as regular payroll and bonus) unless they define different or more detailed payment information on the line item level.

> Note
>
> The MDF-based Payment Information is based on the employment of the employee. Therefore, in order for MDF-based Payment Information to work, the job information and job country of the employee must be set up. The country/region picklist should also be updated, including the 2/3-letter ISO country/region code.

Employees access the card by following: *Employee-Self-Services* > *My Employee File* > *Public Profile* > *Personal Information*.

Administrators access the card by following: *Employee File* > *Public Profile* > *Personal Information*

2.1.2.2 Configuring Employee Central Settings

Enable areas within Employee Central from this page.

Prerequisites

You must have the required permissions to view the page: *Permission Settings* > *Manage System Properties* > *Employee Central Feature Settings*

Context

Manage the areas of Employee Central using the Admin Center, for example:

- Time and Attendance Management
- Person, Employment and Worker Type
- Position Management
- Deductions Management
- Advances
- Fiscal Year

- IT Declarations
- Cost Distribution

Procedure

1. Go to *Admin Center* > *Manage Employee Central Settings*.

   > Note
   >
   > If you are unable to see this page, it is recommended that you log out and log back in to the Admin Center. Doing so will trigger the changes in permission immediately. You should then be able to search for the *Manage Employee Central Settings* page.

2. Enable your changes.
3. Save your changes.

2.1.3 Configuring the Data Model

Data models define the structure, properties, and connections of data elements in a database.

Data Model	Configuration
Data Models in SAP SuccessFactors	This topic introduces the data models used in SAP SuccessFactors HCM suite.
Foundation Objects	Foundation objects are used to set up data that can be shared across the entire company, such as job codes, departments, or business units.
Corporate Data Model	Corporate Data Model defines all organization-related data in XML.
Succession Data Model (SDM)	Succession Data Model defines objects that are related to the person or the employee in the company.
Country/Region-Specific Data Models	Setting up country/region-specific data models allows you to have fields only needed for that country/region as well as have fields in specific formats, for example, date or monetary amounts.

2.1.4 Foundation Objects for Handling Pay-Related Areas

Some of the foundation objects (FO) can be used to handle pay-related issues. This information states what and how they are paid.

Pay-Related Objects A-Z

<table>
<tr><th>Object</th><th>Object Type</th><th>Description</th></tr>
<tr><td>Pay Component</td><td>Legacy</td><td>An employee’s pay is comprised of more than one component, such as Basic salary, Target bonus, Company car allowance, and so on.

For each pay component, a company needs to define attributes such as:
Is the pay component recurring or one-time?
If the pay component is recurring, what is the frequency? This can be set directly on the pay component and propagated to the employee’s record when the pay component is selected, or it can be derived from other attributes, such as the Pay Group.
Is the pay component an amount or a percentage?
If percentage, what is the percentage based on? For example, is it based on how much of a particular product the employee makes or sells?
Is the pay component actual pay or a target amount?
Who has the ability to select or view the pay component? This can be controlled using RBP.
Should the pay component be used by the Compensation module?
Is the pay component taxable or non-taxable?</td></tr>
</table>

Object	Object Type	Description
Frequency	Legacy	Frequency is used by the PayComponent Foundation Object to determine how often a pay component is paid - for example, annually.
Pay Component Group	Legacy	It is possible to group pay components into pay component groups. The amount of a pay component group is equal to the sum of the pay components it includes. If the amounts in question are in different currencies or for periods of less than a year, the system automatically annualizes them and converts the currencies.
Pay Grade	Legacy	Pay Grade is a Foundation Object related to Job Classification. A Job Classification is connected by default to a Pay Grade. This is optional and you can turn it off in the Corporate Data Model using the Grade field on the 'jobCode' element. To do this, simply set the visibility to "none". It can be used to identify when a transaction is lateral move, a promotion, or a demotion.
Pay Range	Legacy	Pay Range is primarily used for the calculation of Compa Ratio and Range Penetration. The system stores minimum, median, and maximum points of a pay range. Your company can define as many pay ranges as required. The range generally includes Pay Grade, Geozone, and Legal Entity and are updated every year. **Note** For Employee Central integration to SAP SuccessFactors Compensation, Pay Grade to Pay Range association is required for the system calculations and must be the first association listed in the data model.

Object	Object Type	Description
Pay Group	MDF	We recommend that you group people who share the same payroll-related attributes into one pay group. For example, employees in Europe who are all paid by SAP Payroll and paid bi-weekly can be grouped into one European Pay Group.
Pay Calendar	MDF	The PayCalendar Foundation Object stores all the payroll periods within a year. For example, June 1 – June 15 2016 could be one payroll period.

For more information, see the Implementing and Configuring Employee Payments in Employee Central guide on the SAP Help Portal.

2.1.5 Pay Scale Structure

Structure	
Pay Scale Structure	This topics explains how you can define your pay scale structure centrally and how to assign employees to it.
Compensation Structure	This topic explains how to specify pay structures for different locations, legal entities, as well as for different types of workers.

3 Workforce Analytics and Data

Effectively leverage workforce analytics and data.

Although companies have loads of data, most of it does not reflect trends in diversity and inclusion. Common reasons are:

- Readily available data creates liability for companies.
- Data interpretation is difficult.
- Data access issues can be too sensitive to risk.
- Data alone cannot change behavior.

To maximize workforce analytics, adopt these practices:

- Determine the critical data you need using SAP SuccessFactor's Workforce Analytics guide.
- Utilize benchmarks as a basis of comparison.
- Show leaders and decision-makers the data that matters using a configurable Diversity Analysis Template.
- Bring the right data into your Diversity Dashboard.
- Use metrics and the *Headlines* capability to make sure managers are taking action.

4 Job Analyzer for Recruiting

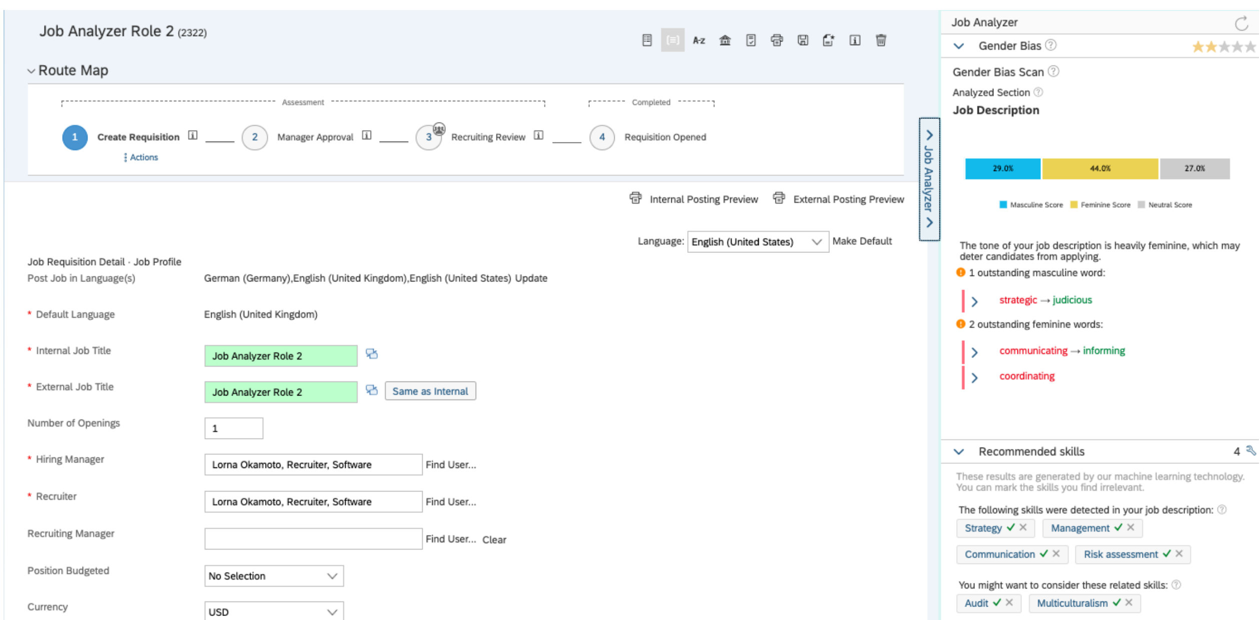
The Job Analyzer is designed to help you create the best job description possible by providing salary and language recommendations. This unique capability is made possible by the use of machine learning techniques, combined with historical applicant data to determine any gender-biased language.

> **Note**
>
> Currently, gender bias scan and skills analysis are available for any English language Job Requisition, while salary analysis is only available for jobs located in the US.

Job Analyzer Tool in Job Requisition

The Job Analyzer Tool is available on the *Job Description* page in SAP SuccessFactors Recruiting Management.

When a user is creating a Job Requisition in SuccessFactors Recruiting, the Job Analyzer provides insights on the effectiveness of the content of the requisition. This information includes analysis of SuccessFactors data, analysis on the effectiveness of the job description, analysis on whether the job description introduces gender biases (bias language checker), and insights and indexes of external aggregated open web data through smart search APIs.



Job Analyzer Tool

4.1 Enabling Job Analyzer Using Upgrade Center

Enable the Job Analyzer to get insights into the effectiveness of your job requisitions.

Prerequisites

The metadata framework (MDF) is enabled.

Context

The Job Analyzer includes:

- analysis of system data;
- analysis of the effectiveness of the job description;
- analysis of gender biases in the job description;
- insights and indexes of external, aggregated open web data through smart-search APIs.

Procedure

1. Go to *Admin Center* > *Upgrade Center*.
2. Choose *Job Analyzer* in the *Optional Upgrades* section.
3. Choose *Upgrade Now*.

   The *Upgrade to Job Analyzer* dialog appears with a confirmation message.
4. Choose *Yes* to proceed.

   A success message is displayed.
5. Choose *Ok* to close the dialog.

Results

The Job Analyzer is enabled and available to people with the relevant permissions.

> → Remember
>
> It can take up to 30 minutes for changes to take effect in the system. You may need to log out and log back in to see changes.

Next Steps

Give the appropriate roles the following permissions:

- *Administrator Permissions* > *Manage System Properties* > *View Job Analyzer Salary Section* (available in Recruiting only)
- *Administrator Permissions* > *Manage System Properties* > *View Job Analyzer Gender Check Section* (available in Recruiting and in Job Profile Builder)
- *Administrator Permissions* > *Manage System Properties* > *View Job Analyzer Skills Section* (available in Recruiting and in Job Profile Builder)

4.2 Feature Details of Job Analyzer Tool

The main features of Job Analyzer tool include Gender Bias Scan, Recommended Skills, Salary, and Machine Learning Notes. Each of these features helps you to create an effective and gender-neutral job descriptions.

Salary Section in Job Analyzer [page 21]
The Salary Benchmark section of Job Analyzer tool allows you to get an overall understanding about the salary information that you have entered in the Job Description.

Gender Bias Section in Job Analyzer [page 22]
The Gender Bias section of the Job Analyzer tool allows you to gauge the language used in the Job Description based on the score. It also suggests you with the alternatives to avoid gender-bias terms in the Job Description.

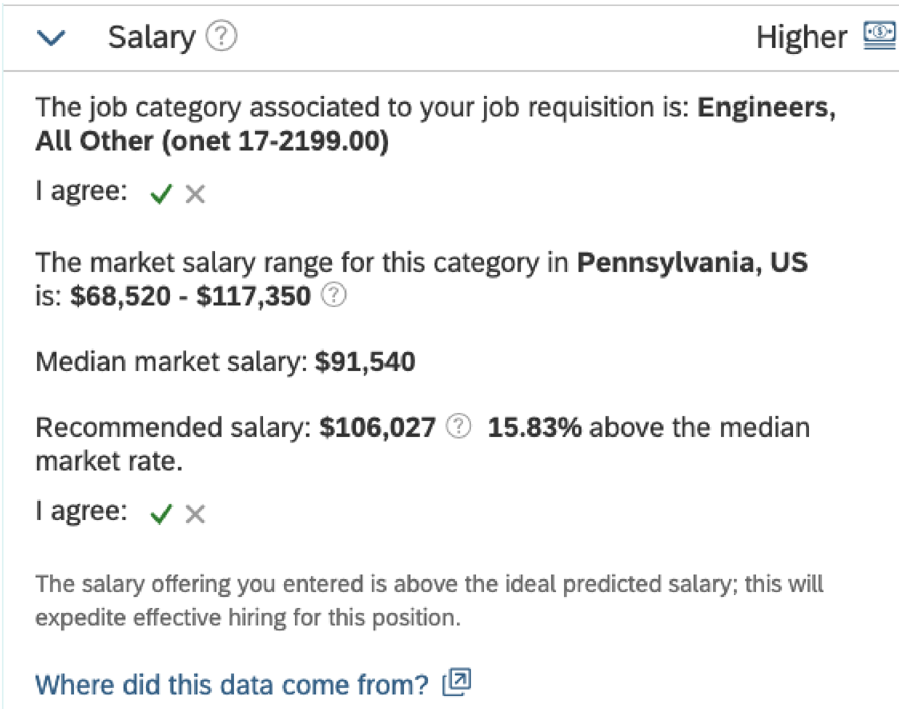
Recommended Skills Section in Job Analyzer [page 24]
The Recommended skills section of the Job Analyzer Tool allows you to identify or mark the relevant and irrelevant skills that are detected in the Job Description through machine learning technology.

Feedback Data in Job Analyzer [page 25]
User feedback can be directly gathered in the Job Analyzer to improve the performance of the Machine Learning features. Job Analyzer provides feedback options for Recommended Salary and Gender Bias Scan.

Machine Learning Notes [page 26]
The Machine Learning results displayed in the Job Analyzer are the outcome of the SAP Machine Learning framework.

4.2.1 Salary Section in Job Analyzer

The Salary Benchmark section of Job Analyzer tool allows you to get an overall understanding about the salary information that you have entered in the Job Description.



Salary Benchmark Section of Job Analyzer Tool

Insight	Description
Market Salary Range	This is the range between the 25th and 75th percentiles of salary data aggregated with official data from the U.S. Bureau of Labor Statistics. The data is filtered to correspond to the Job Requisition ONET Detailed Occupation Title (see **Matched Job Category**), in the geographical area matched with your Job Requisition's location (see **Matched Locations**)
Market Salary Median	This is the Median Salary of the data aggregated with official data from BLS. The data corresponds to the Job Requisition ONET Detailed Occupation Title and Matched Location.
Matched Job Category	This is the O*NET SOC-2010 Detailed Occupation Title that best matches your Job Requisition title and description. This is based on the SAP SuccessFactors' proprietary job classification algorithm trained over millions of job postings gathered over job boards data. You can provide positive or negative feedback by agreeing or disagreeing on whether the Job Analyzer has correctly categorized the Job Requisition into a Job Category.
Matched Location	This is the administrative area that was matched to your Job Requisition Location field to filter the market salary data. As of the Q1 2018 Release, the matched area is at the US State level.

Insight	Description
Recommended Salary	This is the recommendation given by our proprietary prediction algorithm. It expresses the ideal salary of the job you are looking to fill, taking into account the following factors: • Job Title • Matched ONET category of the Job • Skills detected in your Job description • Desired level of experience detected in your Job description • Matched Location of the Job The Salary prediction algorithm is based on the data analyzed over 10 million and more external job postings aggregated by the SAP Recruiting Posting (formerly Multiposting) technology, over public job boards & career sites. This has been adjusted with public salary data (from the U.S. Bureau of Labor Statistics). You can provide feedback using **thumbs up** or **thumbs down** option to agree or disagree with the salary recommendations. Additionally, you can state whether the salary is too high or too low while using the **thumbs down** option.

4.2.2 Gender Bias Section in Job Analyzer

The Gender Bias section of the Job Analyzer tool allows you to gauge the language used in the Job Description based on the score. It also suggests you with the alternatives to avoid gender-bias terms in the Job Description.

Insight	Description
Language Overall Score	Gives an overall rating of the Gender Bias score results. If the Job Requisition contains only neutral wordings, the score is 5/5. This Score is impacted by the amount of non-neutral vocabulary (masculine and feminine), and by the imbalance between masculine and feminine.

Insight	Description
Gender Bias Scan	Gives the proportion of indirect masculine and feminine bias words in the job description and the proportion of neutral vocabulary. This provides the most notable biased words detected in the text. The Gender Detection algorithm also provides alternatives that are marked as neutral, whenever such alternatives exist for a biased word. Selecting one of the proposed neutral alternatives results in the replacement of the biased word with the selected word through-out the Job Description. If Job Analyzer doesn't provide any alternatives for a given biased word, or if you aren't satisfied with any of the suggestions, you can enter a custom word of your own in the text box. You can validate this custom word by clicking *Replace* option. This action results in the following: • The biased word is replaced by the selected replacement, throughout the Job Descrip-tion. • The custom word is sent to the Job Analyzer and is aggregated into a global, growing syllabus of replacement suggestions. **Note** You can revert any changes of words by clicking *Undo* option, but ensure that the Job Analyzer isn't refreshed before you perform this action.

> **Note**
>
> - Job Analyzer is used for Job Summaries (Short Description) and Job Description (Long Description) Job Profile sections using Job Profile Builder.
> - The *Gender Bias Scan* section in Job Analyzer Tool supports all the available English locales. An error message is displayed when the locale isn't supported.

Gender Bias Detection

SAP SuccessFactors uses a combination of data analysis and natural language processing techniques to build the Gender Bias Detection algorithm. The foundation of the algorithm is sociological research, showing that certain wordings in certain contexts carry out societal biases that can, statistically, prevent people from applying to a Job (women being statistically more impacted than men).

For a more complete contextual and sociological explanation, see the Related Information section.

The building of the Gender Bias Detection algorithm follows these three high-level steps:

1. Gathering the base data. Base data is the wordings that were proven to be perceived as gender biased. This is gathered from academic research and curated by linguistic specialists.
2. Expanding the collection of potentially biased words, using Word Embedding. Word Embedding is a Machine Learning technique that can, under certain conditions, uncover semantic and conceptual associations between different words.

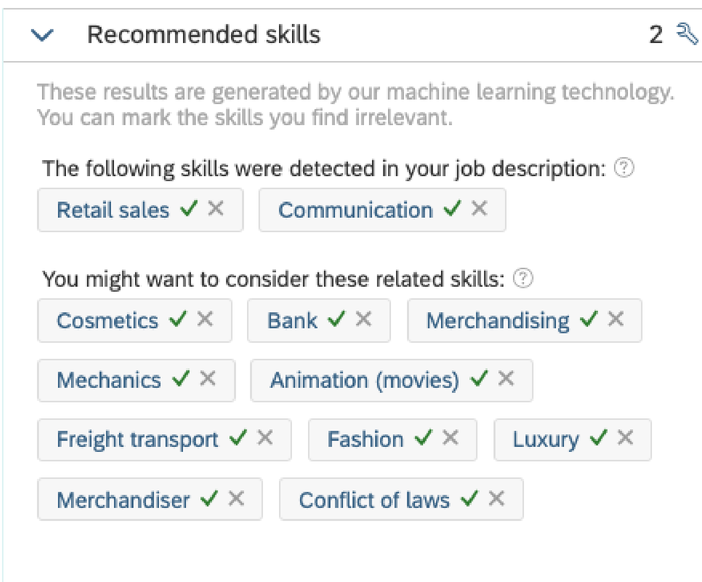
For example, if **caring** is among the list of **feminine biased** words provided by the original research, word embedding could find out that **supporting** is conceptually close enough to **caring** to carry a similar feminine bias, even though it wasn't considered in the original research.

3. Validating and correcting the expanded collection of biased words by confronting it to historical recruitment data. For example, how many past job advertisements contained certain words and the actual impact on the gender of the past applicants.

All data used in building this algorithm is academic research data and public data.

4.2.3 Recommended Skills Section in Job Analyzer

The Recommended skills section of the Job Analyzer Tool allows you to identify or mark the relevant and irrelevant skills that are detected in the Job Description through machine learning technology.



Recommended skills Section of Job Analyzer Tool

Insight	Description
Detected Skills	Hard skills that were detected in the Job Description - Keywords that were detected in your Job Description text and that were matched to an internal database of 3000 skills. This skill database was aggregated using the SAP Recruiting Posting aggregation technology over job boards and career sites. You can provide positive or negative feedback by agreeing or disagreeing on the skills that are found in your Job Requisition.
Related Skills	These are the hard skills that are generally associated with the Job category on the market and potential applicants might use when conducting keyword searches. This serves as a suggestion for possibly adding up additional skills in the Job Description, if relevant.

> ⓘ Note
>
> The *Recommended skills* section in Job Analyzer Tool supports all the available English locales. An error message is displayed when the locale is not supported.

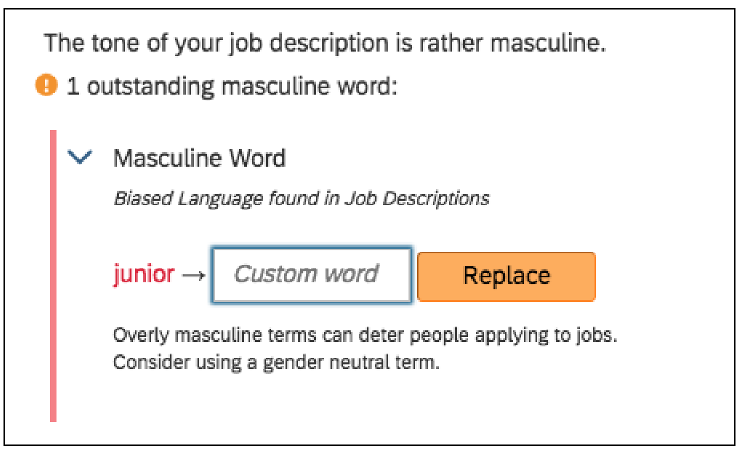
4.2.4 Feedback Data in Job Analyzer

User feedback can be directly gathered in the Job Analyzer to improve the performance of the Machine Learning features. Job Analyzer provides feedback options for Recommended Salary and Gender Bias Scan.

For *Recommended Salary* in *Salary Benchmark* section, you can provide feedback using **thumbs up** and **thumbs down** options to agree or disagree with the salary recommendations. Additionally, you can state whether the salary is too high or too low while using the **thumbs down** option.

In the Gender Bias Scan, you can input your own custom words to replace biased words throughout the Job Description.

This feedback data is sent to Job Analyzer and stored to be aggregated and processed, for the sole purpose of re-training and continually improving the relevance and performance of the algorithm that Job Analyzer uses. It also expands the syllabus of neutral replacement words using the community's inputs.



Sample Feedback Data

The only data that is sent along with feedback is the minimal set of information that is required to apply this technical re-training. Here is the description of information that is sent and information that is **not** sent while giving feedback to the Job Analyzer.

Data Sent with Feedback	Data not Sent with Feedback
• Anonymized Job Title and Location of the Job Requisition. • Job Analyzer results that led to this feedback. • The custom word provided.	• Personally Identifiable Information - No PII is sent or stored back for post-processing. • User identification information - All feedback sent are strictly anonymous.

4.2.5 Machine Learning Notes

The Machine Learning results displayed in the Job Analyzer are the outcome of the SAP Machine Learning framework.

The framework articulates around the following capacities:

- Collecting data on Job Postings that are publicly available on job boards and career sites.
- Normalizing the data to store it in a unified repository, with classification algorithms.
- Enriching the Job postings data with models trained both on the SuccessFactors Recruiting Posting data, SuccessFactors Recruiting Management Job Requisition data, and on academic sources.
- The machine learning algorithms classify individual words of the job description into three classes - male biased, female biased, and neutral. The algorithms are trained on labeled dataset to make predictions. The labeled dataset contains words labeled with their gender bias (for example, ‘dominant’ with label ‘male bias’). We build the labeled dataset from linguistic research and historic applicants ratios for past job postings. Then we process these labeled words through a word-association framework, and train a model that can infer predictions on the gender bias for any new word encountered in job descriptions.

5 Applications and Hiring

Increase gender equity in who applies and who gets hired.

Research shows that a company's recruiting and hiring processes can inadvertently cause bias, resulting in certain demographic groups being repeatedly overlooked for job opportunities.

What causes gender bias in recruiting?

- Career sites and other organizational information put forth in the recruiting process can enable or impede diverse candidate attraction.
- Recruiting in the same places and using the same practices.
- Women not applying to jobs because they feel they do not meet all of the qualifications.
- Job descriptions written in ways that repel members of certain demographics.
- Interviewer bias getting in the way of candidate assessments.
- Women not interviewing the ways an interviewer thinks are "traditional".
- Women being more critically evaluated during interviews.

Use SAP SuccessFactors technology to reduce gender bias in recruiting:

- Configure Career Site Builder to support a diverse, inclusive recruiting message.
- Utilize recruitment sourcing reports to determine where you are currently advertising your open positions and other venues these could be advertised.
- Use validated assessments to ensure fair, consistent applicant measurement.
- Utilize the Interview Guide to ensure consistent, job-relevant interview protocol.
- Use Interview Central to form a panel of interviewers.
- Track your diverse applicants through the recruiting process pipeline to ensure they stay engaged.
- Avoid gender biased language in job descriptions.

5.1 Searching for Jobs

Candidates can search for jobs in a number of ways on RMK career sites, including the Radius Search.

Radius Search

Radius Search allows candidates to enter a postal code and a radius in order to find jobs in a wider area. When using the Radius search, a user can only enter a valid postal code into the zip code box, and as the candidate types, ZIP Codes matching their entered digits will appear in a predictive text box, from which they can select a postal code. The type-ahead zip codes will display in the locale of the page (for example, on a fr_FR page, country names will appear in French). The locale of the page the user is on functions as preference for the type-ahead. For example, if the user is on an en_US page, and begins typing "554" into the zip code box, US zip codes will appear first.

Only zip codes for countries with active jobs will display in the type-ahead. For example, if a client has jobs in the US and Canada, all zip codes for those countries will be available in the type-ahead. The RMK platform does not support certain zip codes, including military codes like APO, FPO and DPO. The zip codes also display their corresponding country. Only countries where the site has active jobs will display. The user can switch between searching by postal code and searching by location by clicking *Search by Zip Code* or *Search by Location*. The unit of radial search will appear in the locale of the page where the user is performing the search. For example, if a page's locale is fr_FR, distance measurements will be in kilometers. Only pages configured for en_US locales will display measurements in miles (This is not configurable).

You can filter the multilocation job postings by title, location or even with description of the job. When you want to filter a multilocation job based on a location, you can either search the job with primary location or a non-primary location.

When you search for the multi-location job with non-primary location, the filtered result displays the job, if the location matches with one of the locations. The search result displays the job and its primary location.

Related Information

Configuring Search Settings [page 29]

5.2 Configuring Search Settings

Customers can enable different types of search on the career site. Available search types are Keyword Search, Location Search, and Radius Search (Search by ZIP Code/Distance).

Context

The *Search* settings, which were available from *Site* > *Site Settings* in the legacy Command Center, are now located in Career Site Builder. You can configure these settings in Career Site Builder whether the site has Career Site Builder enabled or not.

Procedure

- From *Recruiting Command Center*, select the Career Site Builder icon and select the *Search* tab at *Global* > *Global Settings*.

5.3 Source Report

As a recruiter you can use Source Report to view the top sources for visitors, members, and applicants for a specific time period without launching Advanced Analytics.

Career Site Builder is designed so that candidates can access jobs through a variety of different paths. When jobs are posted in SAP SuccessFactors Recruiting using recruiting posting or XML feeds, those jobs always contain tracking.

The Source Report is located in *Recruiting* > *Source Tracker*.

When you use Source Report, you can view filtered Career Site Builder data for these activities:

Tracked Activities in Source Report

Measured Activity	Description
Source	Categorized based on custom rules engine.
Visitors	Displays visitor count for the selected source. Visits occur when candidate passes from a source to your Career Site Builder that's recorded each time. Visits aren't recorded when candidates navigate to different pages within SAP SuccessFactors Recruiting

Measured Activity	Description
Subscribers	Subscriber Count. Subscriptions are when candidates join the Talent Community, or when they create their candidate profile. Also occurs when candidate signs up for job alerts or complete their candidate accounts during the process of applying for a job.
Apply Starts	Displays the *Apply Starts* for the selected source. An *Apply Start* is recorded when a candidate selects the *Apply Now* button on a job on an external career site.
Visit/Apply %	Percent of applications per visit that's calculated by dividing the number of *Apply Starts* by the number of visits.
Chart data	You can view Career Site Builder activity data using different chart types when you select the horizontal grip selector. **Note** This isn't available in Advanced Analytics

Available Chart Types

When you've entered the criteria you want to use, the source report table displays data and visualization of your data. By default, the table and pie chart displays data from all sources.

Different Charts Used in Source Reports

Chart Option	Description
Visitors Pie Chart	Pie chart that displays the percentage of visitor source data.
Subscribers Pie Chart	Pie chart that displays the percentage of subscriber source data.
Apply Starts Pie Chart	Pie chart that displays the percentage of *Apply Starts* source data.
Show Trend	Graph that displays your trend data.
Add Trend to series	Displays your trend data as a series

> **Note**
>
> You can view graphical and pie data for all sources, or by a specific source.

Incorrectly Tracked Source Data

Incorrectly tracked source data can appear in one of two ways in Source Report:

- High volume of *Direct* source types when improper source tracking is used.
- High volume of *No Type* or *RCM Redirect* visitors when non-SAP SuccessFactors Career Site Builder is used.
- To mitigate such issues, use URL builder to share jobs with third parties. For accurate tracking when sharing job URLs, ensure you use only the Career Site Builder job URLs.

5.4 Posting Multi-location Job for Recruiting Marketing

Multi-location job posting feature allows you to post a Job Requisition with multiple location values on Recruiting Marketing career site.

Some of the functional areas of Recruiting Marketing that support multi-location job posting are Search; Job List display (both search and category), Google Job Map; and Job Details page. Currently, Job Feeds, Analytics and Category Wizard will not support multi-location job posting.

The processes and UIs that do not support multi-location job posting operates using the primary locations. This primary location is represented using the current location properties in Recruiting Marketing Job Model.

For information on configuration details, see Posting Multi-location Job in SAP SuccessFactors Recruiting Management guide.

5.5 assessment-scale Element

The assessment scale element defines the rating scale that will be used to assess all applicants interviewed on this requisition via Interview Central.

You need access to Provisioning to configure the Job Requisition XML.

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

```
<assessment-scale reverse-scale="false">
```

Recruiters can rate applicants on competencies as part of the Interview Central process. Additional setup is required for provide interview assessment functionality.

reverse-scale Attribute

```
<assessment-scale reverse-scale="false">
```

Some clients have their instances set up such that the rating scales are reversed; 1 is the highest possible rating instead of the lowest. For such a client, the reverse-scale attribute ensures that Interview Central respects that same logic.

scale-id Element

```
<scale-id><![CDATA[Interview Scale]]></scale-id>
```

Associates a rating scale to the requisition to determine what rating numbers and labels are used in Interview Central. The rating scale must already be configured in the instance. The exact name of the rating scale, including correct capitalization, spacing and punctuation must be used. Avoid special characters.

Related Information

Requisition Data Model
Interview Central [page 50]

5.6 Integrating Recruiting with Third-Party Vendors for Candidate Assessment

Integrate SAP SuccessFactors Recruiting with third-party assessment vendors so that you can use them to perform candidate assessment.

Prerequisites

- You must have appropriate licensing to use the Assessment Integration.
- For standard SHL, PeopleAnswers, and CEB or TalentCentral integration:
  - Your Boomi account must be provisioned to access Integration Packs and the Atom Cloud where they're deployed. Provisioning of the account is directly tied to the SKU used to purchase the integration.
  - Your account must have an environment created and attached to the Boomi Cloud.
  - The Recruiting Management system must be configured for Assessment Integration before configuring the third-party integration using middleware.

    - SAP SuccessFactors Recruiting Management and PeopleAnswers/SHL Using Boomi
    - Recruiting Management and PeopleAnswers/SHL
- For vendor integration:
    - Engage with vendor for proper contract.
    - Choose the middleware.
- Ensure that you have Provisioning access.

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

- Ensure that you grant *Manage Assessment Vendors* permission to recruiting users.

Context

Configuring Assessment Integration requires engagement from an Implementation Partner for configuring XML and enabling additional settings. The steps that require an Implementation Partner are identified.

Procedure

1. Enable the following options in *Provisioning* > *Company Settings*:
    - *Enable Assessment Integration*
    - *SFAPI*
    - *Enable SFAPI Webservices*
2. Add assessment vendors.
    - Users with Manage Assessment Vendors permissions can add assessment vendors. Go to *Admin Center* > *Manage Assessment Vendors* and upload the Assessment Vendors CSV file.
    - Recruiting users with admin permissions can add, change, and remove custom assessment vendors in the Admin Center. Vendor can build an assessment integration, and then select the vendor for the assessment package when creating a job requisition. You can build out the middleware template to consume the data from Recruiting Management and send it to a new vendor (refer to the middleware guide for more detailed instructions). The following alert must be used: `rcm_assessment_alert_v2`.
3. For the first vendor import, export the CSV file to generate a sample file that contains the required columns.

    The following fields are mandatory:
    - **externalPartnerCode** (External Partner Codes for Supported Third-Party Assessment Vendors [page 38])
    - **clientId** (Comes from the assessment vendor and corresponds to client being implemented. Ensure that the clientId is unique in the file. Otherwise, there can be configuration issues.)
    - **active** (Y/N)

→ Tip

Complete the import/export of assessment vendors before the Import/Export Assessment Vendor Packages, else an error occurs.

4. Upload the assessment vendor packages in *Provisioning* > *Managing Recruiting* > *Import/Export Assessment Vendor Packages*. The third-party vendors provide the assessment vendor packages.

   For the first vendor package import, export the CSV file to generate a sample file that contains the required columns. The following fields are mandatory:

   - `vendorId`: Identifies the assessment vendor the package uses. The only supported values are listed in the approved vendor list.

     ⓘ Note

     `vendorId` has to be the same as `clientId`

   - `packageCode`: identifies an assessment solution to use for the order. Generated by the third-party assessment vendors.
   - `shortName`: Shortened name of the package for use on the candidate summary page. The complete name appears elsewhere.
   - **Label for each locale**: The combination of the country and location code for each language in which the assessment is displayed. For example: en_US, fr_FR.

   The following columns are included in the template, but aren't used. You can leave these empty:

   - `Reportpackagecode`
   - `ComparisongroupID`
5. Create an SFAPI integration user.
6. Grant Access to *Event Notification Subscription* permission to the SFAPI integration user.
7. Grant the SFAPI *Retrieve Assessment Order* permission to the SFAPI integration user.
8. Grant the *SFAPI Update Assessment Report* permission to the SFAPI integration user.

   ⓘ Note

   Provide unique field names and fieldkey values for all SFAPI operations.
9. Grant *API User Login* permissions for the SFAPI integration user.
10. Set the API logon exceptions. Go to *Admin Tools* > *Password & Login Policy Settings* > *Set API Login Exceptions* > *Add*. Then set the following:

    - *Username*: Select the SFAPI integration user.
    - *Maximum password age (days)*: Set this option to -1.
    - *IP Address Restrictions*: Designated IP addresses or address range for use with integration.
11. Add an Event Notification Subscriber. Go to *Admin Center* > *Event Notification Subscription*. Click the *Subscriber* tab, and click *Edit Subscriber* to add or edit a subscriber.
12. For each new subscriber entry, complete the following information:

    - *Category*: Default to **Customized**
    - *Subscriber ID*: Vendor name list

- *Name*: Any text
- *Group*: Any text
- *Status*: Active or Inactive
- *Client Id*: This has to match the `externalPartnerCode` from the approved vendor list.

> ⓘ Note
>
> *Client Id* has to be the same as *Vendor Id*.

13. Add the Boomi, HCI, or other middleware process subscriber.

    - For PeopleAnswers and SHL (Boomi and HCI) and for CEB/TalentCentral (Boomi), go to *Admin Center* > *Event Notification Subscription*, click the *External Event* tab, and then click *Add* to configure a new subscription.
      To add the process as a subscriber, enter the following information:
        - *Alert Type*: rcm_assessment_alert
        - *Subscriber ID*: In the dropdown, select the subscriber you have already created.
        - *Protocol*: SOAP_OVER_HTTP_HTTPS
        - *Endpoint URL*: Boomi, HCI, or other middleware Web Service URL. To create the Web Service URL, append `/ws/soap?wsdl` to the URL in the Shared Web server settings in the middleware account.

      > ⓘ Note
      >
      > If the middleware Web Service requires authentication, enter the username and password.

    - For custom vendors, go to *Admin Center* > *Event Notification Subscription*, click the *External Event* tab, and then click *Add* to configure a new subscription.
      To add the process as a subscriber, enter the following information:
        - *Alert Type*: rcm_assessment_alert_V2
        - *Subscriber ID*: In the dropdown, select the subscriber you have already created.
        - *Protocol*: SOAP_OVER_HTTP_HTTPS
        - *Endpoint URL*: Boomi, HCI, or other middleware Web Service URL.

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

    Add and permission the assessment field on the Job Requisition XML.

    Job Requisition assessment field XML sample

    Sample Code

    ```
        <field-definition id="assessment" type="derived" required="true"
    custom="false">
        <field-label><![CDATA[Assessment assocication]]></field-label>
        <field-description><![CDATA\[Assessmentasso]]></field-description>
        </field-definition>
        <field-permission type="write">
              <description><![CDATA[job code permissions]]></description>
                <role-name><![CDATA[R]]></role-name>
                <status><![CDATA[pre-approved]]></status>
    ```

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

15. → Remember

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

Add the Assessment Integration feature permission and feature permission block to the Job Requisition XML.

The Assessment Integration feature permission is used to permission the Assessment Portlet in the applicant profile.

Job Requisition Assessment Integration Feature Permission XML Sample

Sample Code

```
    <feature-permission type="assessmentIntegration">
        <description><\!\[CDATA\[Operators with below roles can see 
Assessment detail report for the applicant when the application is in Phone 
Screen Status\]\]></description>
        <role-name><\!\[CDATA\[S\]\]></role-name>
        <role-name><\!\[CDATA\[T\]\]></role-name>
        <role-name><\!\[CDATA\[O\]\]></role-name>
        <role-name><\!\[CDATA\[R\]\]></role-name>
        <role-name><\!\[CDATA\[G\]\]></role-name>
        <status><\!\[CDATA\[Phone Screen\]\]></status>
    </feature-permission>
    <feature-permission type="assessmentIntegration">
        <description><\!\[CDATA\[Operators with below roles can see 
Assessment detail report for the applicant when the application is in New 
Application Status \]\]></description>
        <role-name><\!\[CDATA\[S\]\]></role-name>
        <role-name><\!\[CDATA\[T\]\]></role-name>
        <role-name><\!\[CDATA\[O\]\]></role-name>
        <role-name><\!\[CDATA\[R\]\]></role-name>
        <role-name><\!\[CDATA\[G\]\]></role-name>
        <status><\!\[CDATA\[Default\]\]></status>
    </feature-permission>
```

Related Information

SuccessFactors Recruiting Management and PeopleAnswers/SHL Using Boomi

Recruiting Management and PeopleAnswers/SHL

SuccessFactors RCM with Third Party Assessment Vendor-Generic Template

5.6.1 Adding Assessment Vendors

Make assessment vendors available in Recruiting.

Prerequisites

You've enabled *Enable Assessment Integration (requires Candidate Workbench)* in your company instance.

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

Context

As an admin user, you can add, change, and remove custom assessment vendors in the Admin Center. This helps the vendor to build out an assessment integration, and you can then select the vendor for the assessment package when creating a job requisition.

Procedure

1. Go to *Admin Center* > *Manage Assessment Vendors*.
2. To add a new vendor, select *Import* on the *Import/Export Assessment Vendors* page.

   > ⓘ Note
   >
   > Only CSV file type is supported.

   For the first vendor import, export the CSV file to generate a sample file that contains the required columns.

   The following fields are mandatory:
   - **externalPartnerCode**
   - **clientId** (comes from the assessment vendor and corresponds to the client being implemented.)

     > ⓘ Note
     >
     > Ensure that the clientId is unique in the file, else there can be configuration issues.
   - **active** (Y/N)
3. Choose *Submit*.

5.6.2 External Partner Codes for Supported Third-Party Assessment Vendors

A list of supported values for externalPartnerCode.

- ADP
- AON
- ASCEND
- ASPIRING_MINDS
- ASSESS
- ASSESSMENT_SYSTEMS
- AXIOM
- BERKE
- BIDDLE
- BRILLIANTHIRE
- CAMMIO
- CAPP_ASSESSMENT
- CAPPCO
- CARE_ADVANTAGE
- CARTEL_SYSTEMS
- CERTIPHI
- CHECKSTER
- CHEMISTRY
- CHEQUED
- CRITERIA
- CUBIKS
- CUT-E
- CYQUEST
- DDI
- DRIVERCHECK
- EASYRECRUE
- EELLOO
- ELIGO
- EQUIFAX
- ESKILL
- EVOLVE
- EY
- FACET5
- FIRST_ADVANTAGE
- GARTNER
- GIS
- HACKERRANK
- HIRE_TALENT

- HIREDSCORE
- HIREVUE
- HOGAN
- HOLLAROO
- HR_AVATAR
- HR_DIAGNOSTICS
- HRNX
- IBM
- IIC
- INTELEFI
- INTERVIEWED
- INTERVIEWMOCHA
- IONA
- JOMBAY
- KENEXA
- KORNFERRY
- LAUNCHPAD
- LOGI_SERVE
- LUGO
- MAUS
- MAXIMUS
- MEA
- MEYERS_BRIGGS
- MONTAGE
- MROADS
- ONTARGET
- PAN
- PEOPLEG2
- PEOPLEMATTER
- PEOPLISE
- PA
- POMELLO
- PREDICTIVE_INDEX
- PREVUE
- PREVUEHR
- PROFILES_INTERNATIONAL
- PSI
- PYMETRICS
- QFIT
- RECRIGHT
- RECRUITMENTSMART
- REPNUP

- REVELIAN
- RIVS
- SAVILLE_CONSULTING
- SCREENOM
- SELECT_INTERNATIONAL
- SEMAC
- SHL
- SKILLATE
- SKILLSURVEY
- SMARTERER
- SPEEXX
- STANG
- STANG_DECISION_SYSTEMS
- STARTEXAM
- TAG
- TALENT_CENTRAL
- TALENTADORE
- TALENTCUBE
- TALENTMATCH
- TAXCREDITCO
- TESTGRID
- TESTUP
- THINK_TALENT
- THOMAS_INTERNATIONAL
- TRAITIFY
- TRAITS
- VIAPEOPLE
- VIDEOBIO
- VIEPLE
- WALTON
- WONDERLIC
- WORLD-CHECKONE
- WSI
- YOBS
- ZEROLIME

5.6.3 Hard Stop Status for Job Requisitions Without an Assessment

A **hard stop** status in the Job Requisition template ensures that an applicant in the application pipeline can't proceed until the results for the assessment order are returned on the applicant record.

- A hard stop status field is configured in the job requisition template as a standard field.
- On the *Job Requisition Detail* page, the hard stop status dropdown consists of a list of **active**, **default**, **in progress**, and **onboarded** statuses available in the application status set associated with the job requisition.
- When the recruiter moves the applicant to a status past the hard stop status, the system checks if assessment triggers exist for the applicant and if all of them are completed. If yes on both counts, the new status is allowed. If not, the candidate won't be allowed past the status until all assessments are complete.

You can configure and assign permissions to the assessment hard stop field in the job requisition template, just like you can for other job requisition fields. This field is configured as a standard picklist field.

Sample Code

```
 <field-definition id="hardstopStatus" type="picklist" required="false"
custom="false">
  <field-label><![CDATA[Hardstop Status]]></field-label>
  <field-description><![CDATA[Hardstop status for assessments]]></field-
description>
    <picklist-id>jobReqStatus</picklist-id>
  </field-definition>
```

Caution

Although this standard field is configured as a picklist, and picklist ID is provided, the field behaves as a derived field. This field displays the **default**, **on boarded**, and **in progress** statuses of the job requisition, according to the application status set ID associated with the job requisition.

→ Remember

The system doesn't check the selection of the hard stop status against the status configured for the assessment. Don't configure a hard stop status that would exist in the workflow **before** the status associated with the assessment. This would prevent the candidate from moving through the system without being sent an assessment.

5.6.4 Assessment Integration

You can integrate with third-party vendors to perform candidate assessments.

Note

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

Using this integration, you can perform the following:

- Assign assessments to job requisitions.
- Prompt applicants to fill out the corresponding assessment.
- View assessment statuses and results in the assessment portlet within the application.

This integration requires a separate third-party contract with PeopleAnswers, SHL, or other supported vendor. If you opt in to the assessment integration and configure it, Recruiting users can see a section on the requisition that allows them to assign an assessment package to the requisition.

> → Remember
>
> You can't configure multiple assessment packages for the same Applicant Status.

In SAP SuccessFactors Recruiting Management, the following three standard integrations are supported:

- PeopleAnswers
- SHL
- Gartner CEB/TalentCentral

PeopleAnswers requires either Boomi or SAP HCI, whereas Gartner CEB/TalentCentral is supported only for Boomi.

The middleware integration for other vendors is a custom solution that must be built by Professional Services Integrations or Partner Integrations.

> ⓘ Note
>
> - The CEB/TalentCentral integration follows the pattern of the SHL integration for the setup.
> - Currently, the CEB/TalentCentral isn't officially supported for use with SAP HCI. However, the integration works.
> - Submission of a new application triggers assessment integration, provided assessment integration is configured to the new/default application status.
> - Changing the status of an application also triggers assessment integration, provided assessment integration is configured to the status in which you move the application.

Related Information

SuccessFactors Recruiting Management and PeopleAnswers/SHL Using Boomi
Recruiting Management and People Answers/SHL
JobApplication
JobApplicationAssessmentOrder
JobApplicationAssessmentReport

5.6.5 Working with Assessment Integration

Assessments can be configured for any in-progress status in the applicant pipeline.

When an assessment is configured in New Applicant, the assessment is triggered when the candidate applies for the job. Immediately after applying and passing the prescreening questions, the candidate will be redirected to an assessment vendor site. After completing the assessment, the candidate will be redirected back to the career site. Auto-disqualified applicants who fail the prescreening questions aren't prompted to take an assessment.

If you configure the assessment in any status other than New Applicant, the assessment gets triggered when a recruiter or other operator moves the application to a status where assessment is configured. Once the recruiter triggers the assessment, the candidate receives an email with a link to take the assessment.

> ⓘ Note
>
> The tokens [[APPLICATION_ASSESSMENT_PROVIDER_URL]] and [[APPLICATION_ASSESSMENT_PACKAGE_TITLE]] can be used to provide information about the assessment.

This process is single-sign-on and doesn't require additional logon credentials when using PeopleAnswers or SHL. For users with custom vendors, however, whether SSO is enabled depends on how the custom integration to that vendor is built. After candidates complete their assessment on the assessment vendor site, they're redirected to the standard *Thank you for applying* page within the Recruiting Management career site.

The recruiting user can access the assessment results on the candidate summary list page. In the legacy Candidate Workbench, users can also sort results on the *Candidate Summary* page by score, recommendation, and status. However, in the redesigned Applicant Management tool recruiters can sort applicants on the list page by assessment status only. Sorting applicants by assessment recommendations and status is not yet supported.

The assessment portlet displays assessment results on the applicant profile page. The assessment portlet displays differently for different assessment vendors.

> ⓘ Note
>
> You can't configure the same assessment package for different application statuses. Also, you shouldn't edit the assessment package after the job requisition is approved. When associating a new assessment with a job requisition, make sure you fill out all the required assessment fields, or you may have trouble saving the requisition information. Don't save a job requisition.

Available PeopleAnswers Results Fields

Recruiting Field Name	Recruiting Field Value	Translated	PeopleAnswers Field Name	Visible On
Recommendation	• Recommended • Recommended with Qualifications • Recommended with Reservations • Not Recommended	Yes - value is translated	Recommendation	• Legacy *Candidate Summary* page • Individual Application page

Recruiting Field Name	Recruiting Field Value	Translated	PeopleAnswers Field Name	Visible On
Score	Numeric value	Yes - field name is translated	Score	• Legacy *Candidate Summary* page • Individual Application page

Available SHL Results Fields

Recruiting Field Name	Recruiting Field Value	Translated	SHL Field Name	Visible On
Recommendation	• Recommended • Not Recommended	Yes, value is translated.	Passed	• Legacy *Candidate Summary* page • Individual Application page
Percentile	Numeric value expressed as a percentage (%).	No	Scale	Individual Application page
Band	• High • Medium • Low	No	Band	Individual Application page
Score	Numeric Value	Yes - field name is translated	Score	• Legacy *Candidate Summary* page • Individual Application page

Available Custom Vendor Results

Recruiting Field Name	Visible On
Recommendation	• Legacy *Candidate Summary* page • Individual Application page
Score	• Legacy *Candidate Summary* page • Individual Application page
Subscriber ID	Assessment Integration Results portlet
Client ID	Assessment Integration Results portlet

5.6.6 Assessment Integration Known Behaviors

There are several known behavior issues regarding Assessment Integration.

- Hard stop status: A user editing the requisition can trigger an assessment after the status configured for the hard stop. This prevents all applicants from taking the assessment and moving forward in the process. Users should pay close attention to the configuration of the assessment on the requisition to prevent this.

- Uploading and managing the vendor assessments: A user can upload the vendor assessment to RCM. Change the display name of previously loaded assessments by uploading a new list with the new display names. You can't remove uploaded assessments, or remove them from the picklist on the requisition.
- Editing the job requisition: You can edit the assessment after the job requisition is posted but this configuration isn't recommended. If a recruiting user edits the assessment field after candidates have applied to the job (for example, requiring a more rigorous skills screening than was previously asked for), two sets of candidates with different assessment criteria will be created. Permissions for the assessment field are the same as any other field-level permission.
- Adding assessments to a requisition: The assessment field on the requisition has a link that allows the user to add multiple assessments to the requisition. However, PeopleAnswers and SHL only support one assessment per requisition. Don't select more than one assessment per requisition. We recommend adding a text field to the requisition template below the assessment field instructing the user to only add one assessment per requisition. Optional text: "Please Note: The assessment integration only supports one assessment selection per requisition."
- Candidate forwarding: If a recruiting user moves a candidate from one requisition to another requisition and into a status after the assessment trigger status, the system won't send an assessment request to that candidate. Recruiting users should move the candidate to a status before the assessment trigger status in the new requisition.
- Adding assessment score to applicant summary view in the legacy Candidate Workbench: Data for PeopleAnswers and SHL is stored in different fields, and the two vendors don't share a common score field that can be permanently added to the applicant summary page. To view the score for all applicants, you must add the individual vendor score field to the applicant summary view for each requisition.

  > ⓘ Note
  >
  > Assessment score cannot be added as a filter nor display option in the redesigned Applicant Management list page.

- We don't need to initiate assessment for late stage applications.
- The Boomi standard integration for Assessment Integration requires that all the fields used in the integration pack are available in your data model. If you get a failure message in Boomi with the pattern *Exception=[SFAPI Domain Error!] Error Code=[INVALID_FIELD_NAME] Error Message=[Field <field name> isn't defined]*, please check your data model for missing fields. For example, the gender field is used in the integration pack. A client must have this field in the data model, but it doesn't have to be permitted for any user, so it never displays.
- Timezone: Send the date information in the GMT timezone (converted to GMT), as SFAPI doesn't process any other timezone.

5.6.7 Assessment Integration Frequently Asked Questions

Answers to commonly asked Assessment Integration questions.

What is the difference between the Event Type rcm_assessment_alert and rcm_assessment_alert_v2?

Functionally, they're the same. The v2 alert has a common tag and not a specific Boomi tag.

How many assessments can be selected on a requisition?

Select only one assessment per requisition. The system allows you to insert more than one assessment for a requisition, but this doesn't complete the triggers.

Does the job seeker have to log on to complete the assessment?

To complete the assessment, the job seeker must complete their profile. When the job seeker is routed to the assessment vendor from Recruiting, an account is automatically created with the relevant fields prepopulated. For integrations with PeopleAnswers, the job seeker must create a secure login.

How long does it take for the assessment information to be sent from the assessment vendor to Recruiting?

The information is sent in close to real time, but information can take a few minutes to process, send, and store in Recruiting.

Do PeopleAnswers or SHL send back a detailed report explaining the results for the job seeker?

No. The recruiter sees a high lever overview and overall score in Recruiting. Recruiters can also see detailed results by clicking a link for more information.

Do job seekers receive email with a link if they choose to take the assessment at a later time?

Yes. When the assessment trigger is configured for the initial application, job seekers clicks the *Apply* button and are redirected to the assessment vendor site. Job seekers receives an email with a link to the assessment. Job seekers can also visit the *Jobs Applied* page and use the *Action* menu to complete the assessment. If the assessment trigger is configured for any status other than the completed application, the system sends applicants an email inviting them to complete the assessment. They can also visit the *Jobs Applied* page and use the *Action* menu to complete the assessment.

Is there a time constraint when the assessment needs to be completed?

No. There's no technical time constraint.

Is there a way to require job seekers to complete the assessment before they can move through the process?

Yes, by configuring a hard stop status. The hard stop status is configured, the recruiter editing the requisition's assessment information can select which status is the hard stop. Job seekers can't move past this status without completing the assessment.

Are all assessment results translated?

The Recruiting product supports the translation of a set of standard values for assessment-related fields. Other custom statuses outside this standard set aren't supported for translation. Following are the accepted values for Assessment Status, Score, and Recommendation.

- `Assessment Status`
  - Initiated
  - Error ordering assessment
  - Completed
  - Pending
- `Score` This is a number field and the value is numeric.
- `Recommendation` – The field is localized, and the localized values are displayed on the applicant profile page.
  - Recommended
  - Recommended with qualifications (PeopleAnswers only)
  - Recommended with reservations (PeopleAnswers only)
  - Not Recommended

The candidate says that the assessment is complete, but I don't see the results in Recruiting.

Temporary outages or system maintenance can cause a delay results posting. The vendor attempted to repost the delayed results at regular intervals. For PeopleAnswers, when a results post fails for any reason, PeopleAnswers attempts to resend the results, every 10 minutes for first hour, then every hour for the first day, and once daily for up to five days, until it succeeds. If after five days the results aren't posted, contact SAP SuccessFactors for assistance. SHL attempt to resend the results a total of five times, with an extended period between each attempt. For custom vendors, consult the vendor.

Is assessment email templates overridden at the job requisition level?

The same requisition status may be associated with different assessments for various job requisitions. Thus, the email template may differ depending on the assessment package, as the email can include instructions to perform the assessment or specific guidelines for that assessment.

Is link to the assessment report provided?

Assessment reports are provided access controlled and provided on request. The reports cannot be viewed by everyone.

What happens if an applicant is being asked to take an assessment they have previously completed for a similar position?

If a candidate applies for a job and takes an assessment for a company, then reapplies for another job that requires the same assessment, they do not have to complete the assessment again. When the candidate clicks the assessment link, they see a message informing them the assessment is complete. The client should work with the appropriate vendor to define the timeframe for valid assessments.

Can the Candidate Summary page be configured by default to display the Assessment Integration column?

You can't display the assessment integration columns in the candidate summary by default. Unlike other display options, these are not configured in the CDM, but are available by default when an Assessment Integration is configured. The users have to open their display options and enable the columns to be shown.

> **Note**
>
> In the redesigned Applicant Management tool, only assessment status is available by default as filter and display option when an Assessment Integration is configured. Assessment score and assessment recommendation are not supported.

When the candidate is forwarded from one requisition to another, is the assessment information included with the candidates information?

No. Because of the uniqueness of assessments related to the requisition the system does not move that data with the candidate. A forwarded candidate will follow the regular workflow for the new requisition and the assessment will be triggered when the candidate is in the configured assessment status.

What happens if a requisition is closed and there are applicants who have not completed an assessment that has been triggered for them?

The applicant can take the assessment after the requisition is closed. Results from the assessment are sent to the applicants record in Recruiting.

What is required to setup the assessment integration?

Configuring Recruiting and assessment integration requires changes in Provisioning and Admin Tools, and updating files for Boomi/HCI or custom middleware. Clients should coordinate setup with the assessment vendor.

Do we need to use the Boomi/HCI Professional Services Team for this integration?

Yes, this is part of the setup process with Professional Services.

The SHL and PeopleAnswers Integration workflow is great but my customer uses `<insert assessment vendor name here>`. Can we configure Boomi or Recruiting to work the same way with this vendor?

Yes, the standard fields on the Requisition and Application portlets can be utilized with a vendor from the approved vendors list. The middleware piece is completely custom and must be built out. The client can work with Professional Services to create a custom integration with another vendor.

The client has an integration with SAP that create the requisition in Recruiting. Can this integration populate the assessment field(s) on the requisition?

No, you can't populate the assessment fields on the requisition with an API.

How can I describe this integration in 150 words or less?

The assessment integration allows a Recruiting user to set up an assessment order tied to a selected status of the requisition which automatically triggers the applicant to complete their assessment. The assessment results are tracked on the applicant's record and added to the record upon completion of the assessment. The assessment results appear as display options on the applicant list page supporting cross-applicant comparisons.

Does SAP SuccessFactors manage the assessment pricing and contract with PeopleAnswers or SHL for the Client?

No. The client is responsible for managing their relationship with PeopleAnswers and/or SHL.

I understand this integration with SHL or PeopleAnswers uses Boomi or HCI. Does the client need to know we are using Boomi or HCI, and is there another charge?

The use of Boomi or HCL is considered part of the technology stack that's used to manage the PeopleAnswers and SHL integration. The assessment integration for SHL and PeopleAnswers is considered an iFlow. The SKU 'Boomi Integration for Recruiting' includes the use of the SHL and PeopleAnswers iFlow. This is managed by Finance and you should reference the information in BMI for final confirmation.

Does PeopleAnswers or SHL charge for configuring the integration?

The client should check with their PeopleAnswers or SHL representative to discuss costs associated with that vendor.

5.7 Interview Central

Access all your Interview Assessment forms in one place.

Interview Assessment forms pull competencies from the requisition and allow interviewers to provide a numeric rating and comments on each competency. Additionally, interviewers can provide an overall thumbs up or thumbs down on the applicant, add overall comments, and possibly attach documents to their feedback.

You can find all Interview Assessment forms under *Recruiting* > *Interview Central*.

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

Here are some important things to keep in mind about this function:

- Interviewers can only provide one set of feedback per applicant. Even if two separate interviewers give feedback, only one set of competency ratings will be saved for each applicant.
- Once an interviewer has rated a candidate, you shouldn't make any further changes to the competencies, rating scale, or reverse scale option in the Job Requisition XML. This will cause the Interview Assessment form to display incorrect data.

Related Information

Configuring Interview Central [page 51]

5.7.1 Configuring Interview Central

Configure Interview Central so that interviewers can use Interview Assessment forms to provide feedback on an applicant.

Prerequisites

You have access to Provisioning.

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

Context

Interview Assessment forms pull competencies, skills, and interview questions from the requisition. This allows interviewers to provide a numeric rating and comments on each competency and skill. Additionally, interviewers can provide an overall for the applicant by choosing **Recommended** or **Not Recommended**, add overall comments, and possibly attach documents to their feedback.

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

Here are some important things to keep in mind before you start using it:

- Interviewers can provide only one set of feedback to each applicant. If one or more interviews take place, one set of competency ratings is saved for each interviewer. The overall rating is then calculated as the average of all ratings provided by interviewers for each applicant.
- Once an interviewer has rated a candidate, don't change the competencies, skills, rating scale, or reverse scale option in the Job Requisition template as it causes incorrect data to appear in the Interview Assessment form.
- Recruiters add Interview questions to a Job Requisition through the Job Profile. Interviewers can view these interview questions linked to a Job Requisition in the *Print and Go* pack in *Interview Central*.

Procedure

1. Go to *Provisioning* > *Company Settings* and select the following options:
   - *Enable Interview Central and Set up Interviewers Popup*
   - *Enable Stack Ranker style Interview Assessments*

2. Perform the following in Job Requisition template.
    a. Set up the competencies field ID in the Job Requisition template. We recommend that you make it a required field.

Sample Code

```
  <field-definition id="competencies" type="competencies" required="false"
custom="false">
    <field-label mime-type="text-plain"><![CDATA[Interview
Competencies]]></field-label>
    <field-label mime-type="text-plain"><![CDATA[Interview
Competencies]]></field-label>
</field-definition>
```

b. Set up the assessment scale element and a valid rating scale in the Job Requisition template. Note that only competencies and skills can be rated on the Interview Assessment form. Other data elements can't be shown.

Sample Code

```
<assessment-scale reverse-scale="false">
 <scale-id><![CDATA[Interview Scale]]></scale-id>
</assessment-scale>
```

The `reverse-scale` option in the Job Requisition template is used when lower scores are visually portrayed as preferable on the *Interview Assessment* and *View Candidate Ratings* screens.

c. Specify the `interviewAssessment` feature-permissions for the relevant statuses (one feature-permission block for each status) in the Job Requisition template.

Sample Code

```
<feature-permission type="interviewAssessment">
 <description><![CDATA[description]]></description>
 <role-name><![CDATA[S]]></role-name>
 <role-name><![CDATA[T]]></role-name>
 <role-name><![CDATA[R]]></role-name>
 <role-name><![CDATA[G]]></role-name>
 <status><![CDATA[Interview]]></status>
</feature-permission>
```

→ Tip

The customer can prefer to have the same permission for interview statuses and all statuses beyond interview. Because in practice, there's no difference between accessing interview setup and accessing interview results.

d. Set up the Interview Guide in the Job Requisition template.

Sample Code

```
<field-definition id="interviewGuide" type="multiattachment"
required="false" custom="false">
<field-label mime-type="text-plain"><![CDATA[Interview Guide Documents]]></
field-label>
<field-description><![CDATA[Interview Guide Documents]]></field-
description>
</field-definition>
```

e. Set up the Hiring Manager note in the Job Requisition template. When adding permissions for this field, ensure that the Hiring Manager has Edit permissions.

Sample Code

```
<field-definition id="hiringManagerNote" type="textarea" required="false"
custom="true">
<field-label><![CDATA[Hiring Manager Note]]></field-label>
<field-description><![CDATA[Hiring Manager Note]]></field-description>
</field-definition>
```

3. Perform the following in the Job Application template.

a. To display interview-related data on the application record and make some interview information reportable and tokenized, define the `interviewResult` and `overdueInterviews` fields.

Sample Code

```
<field-definition id="interviewResult" type="derived" required="false"
custom="false" public="false" readOnly="false" anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[Interview Result]]></field-
label>
  <field-description><![CDATA[average rating of the interviews
completed]]></field-description>
</field-definition>
<field-definition id="overdueInterviews" type="derived" required="false"
custom="false" public="false" readOnly="false" anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[overdueInterviews]]></field-
label>
  <field-description><![CDATA[number of overdue interviews]]></field-
description>
</field-definition>
```

The `interviewResult` field contains the average rating of the completed interviews and the `overdueInterviews` field contains the number of overdue interviews. An overdue interview is one that's incomplete, has no start date, or has a start date in the past. The *overdue interview* option appears after the scheduled date of the interview. If there's no scheduled date, that status is always displayed.

b. If using single stage application, add permissions for the `interviewResult` and `overdueInterviews` fields in the Job Application template. If using multistage application, add the permissions in the Job Requisition template.

c. Optionally, define the field-refs in the Job Application template display options.

Sample Code

```
<candidate-summary-display-options-config>
  <category id="invCategory" name="invCategory">
   <label><![CDATA[Interview Results]]></label>
   <column field-ref="interviewResult" select-by-default="false"
gridOrder="1"></column>
   <column field-ref="overdueInterviews" select-by-default="false"
gridOrder="2"></column>
  </category>
</candidate-summary-display-options-config>
```

When these fields are defined in the display options, the system doesn't respect the *Display Interview Result and Overdue Interviews in candidate summary page* option in *Manage Recruiting Settings*.

4. Go to ▶ *Admin Center* ▶ *Manage Recruiting Settings* ▶ and do the following:
   a. To allow interviewers to access the application page of the applicant they're interviewing, scroll down to the *Interview Central* section and select the access level for the *Grant Interviewers the access level of* option. If interviewers don't need to have application access level, set this option to *No Selection*.
   b. If you want to display interview-related options on the applicant list page even if `interviewResult` and `overdueInterviews` fields aren't configured as display options in the Job Application template, scroll down to the *Candidate Summary* section. Then, select *Display Interview Result and Overdue Interviews* on the candidate summary page.

5.7.2 Working with Interview Central

5.7.2.1 Setting Up Interview Competencies and Skills

Interviewers can use competencies and skills added in a job requisition to evaluate applicants and provide ratings in Interview Central.

Interview Central works without competencies and skills present on the requisition. However, with competencies and skills, the user experience is enhanced when an interviewer views the Interview Assessment form.

The *Expected Rating* and *Weight %* columns aren't used in the Interview Central functionality. There's no way to disable these unused columns.

5.7.2.2 Setting Up Interviewer Data for Sending E-Mails

Set up a list of interviewers, apply the list of interviewers to applicants, and send e-mail notifications to the interviewers.

Prerequisites

- You must be a recruiting user with the required feature permissions.
- You are in a status to see the `interviewAssessment` feature of an applicant.

Procedure

1. Locate the *Interviewers* screen area, and choose *Set up Interviewers*.
2. Set up an interview team by adding names of interviewers you want in the team.

   When setting up a list of interviewers, you can specify a date and time for the interview, as well as notes. These fields can't be made required.

> Note
>
> You can enter dates and times for the interview for individual interviewers.

- *Name*: Only active SAP SuccessFactors HCM suite users can be selected as interviewers.
- *Date-Time*: This field is optional and can't be made required. There's no calendar integration. Therefore, this field has no relation to a calendar-based interview scheduling.
  Date and time display in the Employee Profile time zone of the logged in user. If another user in a different time zone views the information, it automatically adjusts to the correct date and time for the time zone in their Employee Profile. Interviewers who receive an e-mail notification see the date and time in the time zone stored in their Employee Profile.
- *Notes*: This field is optional and can't be made required. The *Notes* field has a 2,000 character limit.
- *Same people as last time*: If an interviewer list has previously been set up on another applicant on the requisition, the recruiting user can use this button to instantly apply the same list to the applicant being viewed.
- *Apply Interviewer List To All Applicants*: This button allows the recruiting user to define the same list of interviewers for every applicant. This list applies to every applicant presently in interview status and applicants who are placed in an interview status in the future.
  Apply Interviewer List To All Applicants only works for in progress statuses that have been set up with `interviewAssessment` feature permissions in the XML. the default status isn't supported.
  If the interviewer list is being applied to many applicants, then a scheduled job is set up automatically to process adding the interviewers to all applicants. It can take a few minutes to fully apply the interviewers to the applicants. This helps to maintain page load speed and user experience since the user isn't waiting for the confirmation page to load.
- *Include in the invitation e-mail*: Selects the attachments to be included in the e-mail notification to the interviewer. Only resume, cover letter from the application record, and the standard `interviewGuide` field from the requisition can be included in the e-mail notification. Note the `interviewGuide` field can be set up as a multiattachment field if the client wishes to include many requisition-related attachments.
- *Save*: Saves the interviewer list and adds Interview Assessment forms on the Interview Central tab without sending an e-mail notification to the interviewers.
- *Send e-mail*: Saves the interviewer list, adds Interview Assessment forms on the Interview Central tab, and sends an e-mail notification to the interviewers.
  If you click *Send e-mail* after changing an existing interviewer list, the system prompts you to select whether the e-mail is sent to *All Interviewers* or only *Added/Updated Interviewers*.
  It's also possible to include a resume or an interview guide as attachments. If attachments need to be included, disable the document management service, as follows: In *Provisioning*, click *Company Settings* and then, deselect *Enable Document Management Service*.

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

  The text of the interviewer e-mail notification is defined in *Admin Center* > *E-mail Notification Templates Settings* > *Recruiting Interviewer Notification*. The interview e-mail has several special tokens to allow certain interview-specific content to populate into the e-mail.
- *Close*: Closes the interviewer setup popup window without saving changes.

5.7.2.3 Assigning and Editing Ratings in Interview Assessments

Completing assessment for an interview helps in capturing ratings for evaluating candidates. This helps in identifying candidates that are best suited for a requisition.

Context

Recruiting supports rating scales with whole number value only for interview assessments. If you have any rating scale with decimal value, we recommend you to change the rating scale to whole number in *Admin Center* > *Rating Scales*.

Interview Assessment forms remain available on the *Interview Central*. The *Print and Go!* pack contains the date and time of the overall interview schedule. If there are multiple interviewers in the schedule, then individual start times aren't displayed.

> ⚠ Caution
>
> Using \ in a job title can cause an issue on print preview when viewing interview results.

Procedure

1. From Recruiting, select the *Interview Central* tab.

   A list of requisitions appears.
2. Expand each requisition to see the list of applicants.
3. Choose *Rate now* for an applicant to open the interview assessment form. If you've already rated the candidate and would like to edit the ratings, choose *Edit ratings*.
4. Complete the interview assessment form by providing ratings for each skill set.

   You can now review the assessment results.Once you complete an assessment, you can review the interview results and flags for overdue interviews on the candidate summary page. Hovering over a value reveals more detailed information about the interview feedback. You can also see a *View Candidate Ratings* link on the interviewer portlet.

   You can also open and view the candidate’s application record from the interview assessment form, based on the permission level selected by your administrator. If competencies are defined on the requisition, the interviewer can select ratings for each competency that calculates the summary rating. You can use the *Stack Ranker* on the right-hand side to compare candidates in summary or competency by competency to identify the top-rated candidate in each category.

5.7.2.4 Reviewing Interview Assessment Results

View the results of the interview assessment.

Context

On the *Interview Assessment* screen, interviewers can only view their own ratings.

Interviewers can open and view the applicant's application record from the interview assessment form. The interviewer sees data on the application based on the permission level selected by the administrator in *Manage Recruiting Settings*.

The application can only be accessed from the interview assessment form. The applicant's name on the Interview Central dashboard doesn't appear on the interview assessment form.

Procedure

- **Applicant List Page**

  Recruiting users with the appropriate permissions can see Interview Results and a flag for overdue interviews on the candidate summary page. Hovering over a value reveals more detailed information about the interview feedback.

  The list of interviewers is sorted based on the User IDs of the interviewers found in the user data file.
- **Application**

  Recruiting users can view the total interview result and interview status data as fields on the application record if the `interviewResult` and `overdueInterview` fields are configured. If these fields are configured on the Application XML, users with reporting access can report on this data, and administrators can use this data in Recruiting email notifications.
- **Candidate Ratings Page**

  Recruiting users can see a *View Candidate Ratings* link on the interviewer portlet once the interview assessment forms are completed. It’s beneficial to leave the `interviewAssessment` feature-permission set up in all statuses past Interview.

  > Note
  >
  > There is no role-based permission specifically for *View Candidate Ratings*. If an operator has permissions to view an application, then the link will be available. The applicant needs to have interview ratings for the link to show up.

  The Candidate Ratings page displays the names of applicants arranged in alphabetical order and shows a summary of all interviewer ratings on each competency and a total summary rating. Hovering over a competency allows the Recruiting user to view the ratings and comments from each interviewer.

  Choose *Print Preview* on the Candidate Ratings screen or select the print icon that appears when you hover over the applicant's name to produce a full overview of all interactive activity.

- **Mobile**

  Permissioned users can access the interview portlet and view both overall interview feedback and Candidate Ratings using mobile devices.

5.7.2.5 Interview Central Commonly Asked Questions

Answers to commonly asked questions about Interview Central.

If interviewers are removed from the list and the *Mass Apply* button is clicked, what happens to those interviewers on other applicants?

Absent interviewers who haven't begun to provide feedback are removed from all applicants and they can't access their interview assessment forms. If one of the removed interviewers had already begun to provide feedback on the interview assessment form, then that interviewer isn't removed from the interviewer list for that applicant. This is done to ensure that all collected data remains available.

Is it possible to manually adjust the interviewer list on a single applicant after Mass Applying an interview list?

Yes, manual adjustments are saved. Clicking the *Mass Apply* button again later overrides the manual adjustments.

Can I remind interviewers of their overdue interview?

To remind interviewers of overdue interviews, you can configure these features:

- `overdueInterview` field: Configuring this field displays an e-mail icon to automatically resend the Recruiting Interviewer Notification e-mail. This feature doesn't support automatic overdue interview emails. You can't configure this feature to send a different e-mail template. Configure the Recruiting Interviewer Notification in *Admin Center* > *E-mail Notification Template Settings*.
- Interview Assessments Outstanding e-mail trigger: When configured, this e-mail trigger automatically emails the interviewer, depending on the defined conditions for the trigger. Configure these conditions in *Admin Center* > *Managing Recruiting* > *Recruiting Email Triggers*.

These features can be configured together or individually.

How do I enable the "Outlook integration" calendar icon?

Go to *Admin Center* > *Company System and Logo Settings* > *Outlook Calendar Integration*.

Outlook calendar integration provides an icon on the application page. Clicking the *Create Meeting* icon pops up an ics file (appears as an Appointment in Outlook) with the applicant's name populated in the Subject line. This isn't an interview scheduling integration. No additional data flows into the appointment record (no interviewers, date and time, and applicant data). No acceptance data is passed from the appointment into Recruiting.

Disabling this feature is recommended because most clients are seeking full interview integration. This is an enhancement request and under consideration, but enabling the Outlook Calendar Integration may open a conversation about this need that could lead to increased client dissatisfaction.

How do I change the content of the calendar popup or integrate interviewing to Outlook or another e-mail client?

This action isn't supported.

5.8 Applicant Status

As an applicant moves along the steps in the recruiting process, they are assigned different statuses. These statuses enable you to track an applicant's progress, and can be used for recruiting metrics and compliance, as well as for process control.

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

You can configure each step in the workflow with a unique set of attributes that specify whether it is required or can be skipped (with or without comments), how labels appear to users, which candidates can be assigned the status, and whether related activities should trigger e-mail notifications. Admins can manually control the order of the statuses.

> ⚠ Caution
>
> The system considers candidates with statuses of the types OnBoard or Disqualified for data purging.

5.8.1 Configuring the Base Status Set

Configure a base set of statuses that can be used to create applicant status sets used in the recruiting process.

Prerequisites

- Recruiting is enabled in Provisioning.
- You have access to Provisioning.

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

Context

The base status set contains a set of predefined applicant statuses that are necessary for the recruiting process to run correctly. You can add more statuses to the base set, as required by your recruiting process.

> ⓘ Note
>
> - You can’t delete the base status set.

- You can't delete a status from the base status set. However, you can disable it.

Procedure

1. Go to *Provisioning* > *Manage Recruiting* > *Applicant Status Configuration*.
2. Choose *Edit Base*.
3. Choose what you want to do.
    - To add a status to the base set, choose *Add New Status*.
    - To edit an existing status in the base set, choose *Take Action* > *Edit*.

    ⚠ Caution

    The following statuses are predefined when you enable Data Privacy Consent Statement 2.0. **Don't manually add them to the base set**.
    - Declined DPCS
    - Deleted On Demand By Admin
    - Deleted On Demand By Candidate
    - Withdrawn By Candidate
4. Select a status type:

Option	Description
In Progress	Use when the candidate's application is being processed.
Disqualified	Use when the candidate's application has been rejected.
Onboard	Use when the candidate's application has been successful.

5. Enter then save a name and category.

    ⚠ Caution

    To avoid localization issues, ensure that you provide labels for all statuses in the system.
6. Repeat these steps for all the statuses you want to add to the base set.
7. Choose *I'm Done* to save your settings.

Results

Applicant statuses in the base set can now be used to create different applicant status sets.

Next Steps

Create the applicant status sets required by your recruiting process, either in Admin Center or in Provisioning.

5.8.2 Creating an Applicant Status Set

Combine base statuses to create a new applicant status set that is used in Recruiting.

Prerequisites

- You've added all the required statuses in the base status set.

Context

> **Caution**
>
> - You can't delete an applicant status set after it's created.
> - You can't delete a status from an applicant status set after it's added. However, you can disable it.

Procedure

1. Go to *Admin Center* > *Edit Applicant Status Configuration*.
2. Choose a method of creating a new applicant status set.
   - To create one from scratch, choose *Add New*.
   - To create one based on a similar existing one, go to *Take Action* > *Duplicate*.

   A new status set is created. By default, it contains a set of predefined applicant statuses that are necessary for the recruiting process to run correctly.
3. Enter the name of a new status set. You can also give it a description.
4. To add a status to the status set, choose *Add New Status* and select the statuses you want to add in the dropdown menu. Then scroll to the bottom of the menu and choose *Add*.

   The dropdown menu contains a list of the statuses in the base set configured in Provisioning.
5. To add a status group to the status set, click *Add New Status Group*.
6. To edit the status group, enter a *Status Group Name* and a *Status Group Label*. The *Status Group Label* appears on the Talent Pipeline. Select the statuses to include in the group from the list of statuses of the same type.

> ⓘ Note
>
> To require a status before the candidate can progress through the pipeline, select *Require candidate to be in at least one status in this group before moving to the next group*. If you don't select this option, candidates can bypass the entire status group.

7. To save the changes, choose *I'm Done*.

5.8.2.1 Applicant Statuses Predefined by the System

By default, the newly created status set contains certain system statuses. These system statuses are required in order to ensure that the process runs correctly.

System Status	Functionality
Forwarded	Status for candidates a Recruiting user has attached to a job requisition.
Invited To Apply	Status for forwarded candidates who have been invited to apply to a requisition by a recruiter.
Default	Status for newly applied candidates, as well as for forwarded candidates who have been added by a Recruiting user through the *Add to Requisition* option (available in instances with late-stage application functionality.
Auto Disqualified	Status for candidates whose applications are automatically disqualified by the prescreen questions. ⓘ Note There is no functionality that supports status disqualification reasons.
Requisition Closed	Status for applicants when they're placed in an In Progress status when the requisition is closed.
Hired on Other Requisition	Status for applicants when they're placed into a Hired status on another requisition.
Declined DPCS	(Predefined when you enable Data Privacy Consent Statement 2.0) Status for candidates who have revoked their acceptance of the data privacy consent statement after applying to requisitions.
Deleted On Demand By Admin	(Predefined when you enable Data Privacy Consent Statement 2.0) Status for candidates whose candidate profile was deleted by an administrator.

System Status	Functionality
Deleted On Demand By Candidate	(Predefined when you enable Data Privacy Consent Statement 2.0) Status for candidates who have deleted their candidate profile.
Withdrawn By Candidate	(Predefined when you enable Data Privacy Consent Statement 2.0) Status for candidates who withdraw a previously submitted application.

5.8.3 Configuring a Status in an Applicant Status Set

Configure a new applicant status or edit an existing applicant status, as required by your recruiting process.

Context

> ⓘ Note
>
> Although you can set a status for only internal or only external applicants, there's no conditionality (if/then logic) in the status workflow.
>
> You can't configure a hard stop that prevents candidates from moving past a given status in the application until they complete the application.

Procedure

1. Go to *Admin Center* > *Edit Applicant Status Configuration*.
2. Select the relevant applicant status set.
3. Open the status you want to configure:
   - To add and configure a new status, choose *Add New Status*.
   - To edit the configuration of an existing status, find and select the status name to start editing.
4. Configure applicant status settings as required.

   > ⓘ Note
   >
   > Enable at least one language, or else you can't save applicant statuses.
5. Select *Save*.

5.8.4 Applicants in the Applicant Status Workflow

When a candidate completes an application or is forwarded to a requisition by a Recruiting user, the candidate is associated with an applicant status on the requisition.

Recruiting users who have appropriate permissions can move the application through the status pipeline. All status changes are tracked for reporting and compliance purposes. You can view status change history:

- *Application Audit Trail*
- *Application Status Audit Trail* folder in Recruiting and V2 Secured reporting schemas

The applicant status pipeline acts as navigation for filtering the applicant list by status. A Recruiting user can click a status and view only applicants in that status. To see all applicants, click *View all candidates*. Select multiple statuses by holding down the `CTRL` key and selecting the desired statuses.

Grouped statuses display as a dropdown menu in the candidate pipeline. Recruiters can assign a candidate to any of the statuses in the configured group.

The following options are available for the *Forwarded* and *Withdrawn* status sets:

- Hide the status from users who don't have application status *Visible To* privilege
- Hide applicant count from the users who don't have application status *Visible To* privilege

Corresponding statuses or count are either displayed or hidden within the status pipeline and job requisition landing pages for these statuses:

- *Forwarded*
- *Withdrawn*

> **Note**
>
> Users can view applicants only in statuses to which they have *Visible To* access.

> **Caution**
>
> Operator Designators roles are available for selection in the *Selectable By* and *Visible To* section of status settings. Select *All Others* for individuals who have the *V* or *Relational Operators* role.

Recruiting users can place applicants only into statuses for which they have *Selectable By* access even if they don’t have *Visible To* access for that status. Users see an error if they try to place the applicant in a status for which they don’t have *Selectable By* access.

Recruiting users can see a quick overview the applicant status pipeline directly from the *Requisition List* page. Disabled statuses don’t appear in the progress pipeline overview.

5.8.4.1 Recruiting Operators

Recruiting operators define the relationship of a user to a job requisition or job application. Many permissions and routing capabilities are controlled by the operators used in XML configuration templates and route maps.

Where Operators Are Used

- Job Requisition Route Maps
- Job Requisition XML field-permission
- Job Requisition XML feature-permission
- Job Requisition XML button-permission
- Job Application XML field-permission
- Job Application XML button-permission

Operators are central to configuration of the system, so decide early in your implementation project how you are going to use them. Many configuration decisions cannot be made until the customer identifies the users involved in the recruiting process.

> Note
>
> Custom Operators are not supported in job requisitions.

Role Operators

A predetermined list of operator fields is supported, and each operator field has a related designator.

Operator designators determine permissions for users listed in both the operator fields and the operatorTeam fields.

Determine how this list of operators is used in your business process. Then go to *Provisioning* > *Job Requisition System Field Labels* to set up the operator fields with the appropriate labels.

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

Recruiting Operator Fields and Designators

Operator Field ID	*Designator*	*Dependent Operator Team*

Baseline permissions (no field ID)	V The **V** designator defines the baseline permissions a recruiting user receives when viewing the record, if the system cannot identify another operator association for them. For example, if the Job Requisition is routed to an unrelated user to approve, that approval user would receive **V** permissions. Whatever permissions you've assigned to the **V role** are also automatically assigned to all other roles. For example, if the **V** has permission to write to the internal title, then the **O role**, **G role**, and all other roles automatically have that permission, without any additional configuration.	vTeam • **V role**: The **V** role is the Approver role. It is assigned to all users who are on the Job Requisition route map for approving the Job Requisition. This is in addition to any other role they may have on the Job Requisition. So Originator **O** always also has the **V** role. • **vTeam**: Simply assigns the **V** role to anyone who is added as part of the team. It works as any other operator team role. This allows users who are added to this group, the permissions to see Job Requisitions and associated fields permission for the **V** role, with the user selection limited to the group specified.
originatorName	O	originatorTeam
hiringManagerName	G	hiringManagerTeam
recruiterName	R	recruiterTeam
coordinatorName	T	coordinatorTeam
sourcerName	S	sourcerTeam
secondRecruiterName	W	secondRecruiterTeam
vpOfStaffingName	Q	vpOfStaffingTeam
<candidate (no field id)> **Used only in multistage application environments**	C	*None*

Relational Operators

In addition to the operator fields, you can set up permissions and routing to users who have a defined relationship to the operator users. These relationships are derived from relationships established in the user data. The following table shows supported relationships to the operator fields and the corresponding designator for each relationship.

> ⓘ Note
>
> The relational operators do not have access to requisition unless they are a part of the route map.

Most operator designators (R) can be appended with a relationship designator (M) to indicate a relational operator (RM). The exception is V, which cannot be set up relationally, because it does not hold a single user but defines baseline permissions for users who are not in a specific operator or team field.

Relational Recruiting Operators

Operator Relationship	*Designator*
Operator's Manager	xM
Operator's Manager's Manager	xMM
Operator's Management Chain	xM+
Operator's Direct Report	xD
Operator's Direct Report's Report	xDD
Operator's HR Contact	xH
Operator's Matrix Manager	xX
Operator's Custom Relationship	xC

5.8.5 Applicant Status Frequently Asked Questions

Answers to frequently asked questions about applicant status.

Can I require either status A or status B, and prevent applicants from progressing through the pipeline until they've passed through one of those statuses?

This option isn't supported.

Can I configure a conditional applicant status workflow?

This option isn't supported, but you can set a status as external or internal only.

How do I configure a different status workflow for requisitions in different countries/regions, departments, and so on?

Requisitions and applications have a one-to-one relationship; set up a different requisition template for every application. The recruiting must then open the correct type of requisition based on the applicant status workflow.

Can I prevent an applicant from progressing in the status workflow until there's an approved offer?

Assign *Selectable By* privileges to the user for the status you're attempting to move the applicant to.

Configure the `statusId` field in the Application XML file (**Not** the Requisition XML file, even if you're using multistage application) for the operator you're using.

Configure all required fields for all operators for the status to which the applicant is currently assigned. Perform this action even if you can't see the fields when logged in as one user. There can be required fields that are visible to another user that need to be populated with data in that status.

Can I prevent an applicant from progressing in the status workflow until a forwarded applicant has completed their application?

If late-stage application is enabled, there's no support for a hard stop status. If late stage application isn't enabled, the applicant can't progress beyond *Invite to Apply* unless the applicant completes the application.

> ⚠ Caution
>
> If *Multi Stage Application* and *Late Stage Application* are enabled, forwarded application required fields aren't validated when changing the status. *Late Stage Application* is designed to skip the validation on required fields.

5.8.6 Integration of Recruiting with Employee Records in Employee Central

The integration between Recruiting Management to Employee Central provides a seamless way to transition an external candidate record into a new employee account, including issuing an Employee ID.

- Customers using both Recruiting and Employee Central can hire internal and external candidates and automatically sync them into their Employee Central database.
- The integration template can pull from the candidate application, job requisition, and offer letter. To maximize data transfer, make sure these XML templates are configured to include the supported fields listed in the Recruiting-Employee Central Transformation Template:
  - Requisition
  - Application
  - Offer Details
- Because the *Manage Pending Hires* list is populated based on offer approval information, a candidate must go through an approved offer approval before being set to *Ready to Hire (Hirable)*.
- Permission to view applicants in *Manage Pending Hires* is based on the requisition operators, not on applicant data.

Map the data from Recruiting Management directly to the equivalent fields in Employee Central. This mapping requires Professional Services configuration in both the Recruiting and Employee Central modules. External Candidate Profile background elements are synched to the Employee Profile automatically when correctly mapped.

With this functionality enabled and configured, Recruiting users can:

- Stage a candidate in a prehire status in the Recruiting module
- Access the Employee Central page for creating an employee
- Review and edit new hire account data pulled directly from the Recruiting module
- Submit a new hire for approval (for example, creation and routing of a new employee account)
- Receive automated notifications of the process progress (for example, final approval received)
- Update the Candidate Profile with the Employee ID
- Auto-synch background element information from candidate profile to Employee Profile after the hire

> → Tip
>
> Background elements don't pass to Employee Central. They're synched directly from the external candidate profile to the Employee Profile .

Related Information

Creating Picklists

5.8.6.1 Configuration

5.8.6.1.1 Instructions in the Application XML

If you want, you can add one or more instructional fields in the Application XML that describe the integration process and provide instructions to Recruiting users on how to complete the hire process into Employee Central.

Recruiting users usually need to know the exact set of conditions that must be met in order for the candidate to appear in *Manage Pending Hires*. If they don't know these conditions, there can be confusion when processing new hires.

If you're using multistage application, configure these fields so that they're only visible in the appropriate offer or hire statuses.

5.8.6.1.2 Configuring Applicant Status for Employee Central Integration

If you’re using Employee Central with Recruiting, you must configure the Applicant Status Set with required statuses to initite the integration.

Prerequisites

You need access to Provisioning.

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

Context

For a status set, we recommend you to configure only one status each for *Hire* and *Hirable*. You may see issues in the hiring process if you configure these statuses more than once.

Procedure

1. Go to *Provisioning* > *Managing Recruiting* > *Applicant Status Configuration*.
2. Select *Edit Base* to edit the base status set, then click *Add New*:

- In the *Type* field, select **`In-Progress`**.
- In the *Status Name* field, enter **`Hirable`**.
- In the *Category* field, select **`Hired`**.

3. Save changes and click *Applicant Status Configuration* to return to the previous page.
4. Edit the default status set to update the *Hired/Hirable* statuses. To edit, click the name of the status set in the *Status Set Name* column.
5. Click *Hire* in the *Status Name* column:
   - Enter **`Hired`** in the *Internal Label* field.
   - Select the *Enable this status* option.
   - Under *Hirable Options*, select **`Hired`**.
6. Create a status for the *Hirable Option* by clicking *Add New*.
   - Select *Hirable*.
   - Select *Add*.
7. Click *Hire* in the *Status Name* column:
   - Enter **`Ready to Hire`** in the *Internal Label* field.
   - Enter **`Ready to Hire`** in the *Candidate Label* field.
   - Select the *Enable this status* option.
   - Select **`Hireable`** option under *Hirable Options*.
8. Move the **`Hirable`** status before the *Hire* status to keep a consistent applicant status trail.
9. Click *I'm Done* to save.

Results

This additional status, *Ready to Hire (Hirable)*, is now available in the applicant status trail in the application.

5.8.6.1.3 Configuring Transformation Template

When data is sent from Recruiting to Employee Central, you have to configure the transformation template so that data can be transferred.

Prerequisites

You have access to Provisioning.

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

Procedure

1. Go to *Provisioning* *Managing Recruiting* *Import/Export Candidate to employee integration template* .
2. Click *Export* and *Submit* to start configuring the template.

Results

The default template gets downloaded on to your system and it looks like the following:

Sample Code

```
<object-mappings integration-type="CandidateToEmployee">
<entity-details-mapping>
<mapping-attribute>
<source entity-type="application" refid="firstName"/>
<target refid="personalInfo.first-name"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="lastName"/>
<target refid="personalInfo.last-name"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="custONBPrefLang"/>
<target refid="personalInfo.native-preferred-lang"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="startDate"/>
<target refid="personalInfo.start-date"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="middleName"/>
<target refid="personalInfo.middle-name"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="startDate"/>
<target refid="employmentInfo.start-date"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="jobrequisition" refid="legalEntity_obj_code"/>
<target refid="employmentInfo.company"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="customBaseSal"/>
<target refid="payComponentRecurring.paycompvalue.1002"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="offerletter" refid="currency"/>
<target refid="payComponentRecurring.currency-code.1002"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="customBasePayFreqCODE"/>
<target refid="payComponentRecurring.frequency.1002"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="customPayComponent"/>
<target refid="payComponentRecurring.pay-component.1002"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="startDate"/>
<target refid="payComponentRecurring.start-date.1002"/>
```

```
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="contactEmail"/>
<target refid="emailInfo.email-address.P"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="jobrequisition" refid="onbEmailType"/>
<target refid="emailInfo.email-type.P"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="jobrequisition" refid="isPrimary"/>
<target refid="emailInfo.isPrimary.P"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="startDate"/>
<target refid="compInfo.start-date"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="customEventReason"/>
<target refid="compInfo.event-reason"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="cellPhone"/>
<target refid="phoneInfo.phone-number.C"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="phoneTypePrimary"/>
<target refid="phoneInfo.phone-type.C"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="jobrequisition" refid="isPrimary"/>
<target refid="phoneInfo.isPrimary.C"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="homePhone"/>
<target refid="phoneInfo.phone-number.H"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="phoneTypeAlternate"/>
<target refid="phoneInfo.phone-type.H"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="jobrequisition" refid="legalEntity_obj_code"/>
<target refid="jobInfo.company"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="jobrequisition" refid="onbPayClass"/>
<target refid="jobInfo.eeo-class"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="jobrequisition" refid="onbFLSAStatus"/>
<target refid="jobInfo.flsa-status"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="jobrequisition" refid="location_obj_code"/>
<target refid="jobInfo.location"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="jobrequisition" refid="positionNumber"/>
<target refid="jobInfo.position"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="startDate"/>
<target refid="jobInfo.start-date"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="jobrequisition" refid="hiringManagerName"/>
<target refid="jobInfo.manager-id"/>
```

```
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="country"/>
<target refid="homeAddress.country.home"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="startDate"/>
<target refid="homeAddress.start-date.home"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="address"/>
<target refid="homeAddress.address1.home"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="city"/>
<target refid="homeAddress.city.home"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="state"/>
<target refid="homeAddress.province.home"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="state"/>
<target refid="homeAddress.state.home"/>
</mapping-attribute>
<mapping-attribute>
<source entity-type="application" refid="zip"/>
<target refid="homeAddress.zip-code.home"/>
</mapping-attribute>
</entity-details-mapping>
<role-mapping>
<manager-roles>
<role>G</role>
</manager-roles>
<target-roles>
<role>G</role>
<role>G</role>
<role>G</role>
<role>G</role>
<role>G</role>
</target-roles>
</role-mapping>
</object-mappings>
```

5.8.6.2 Changing the Candidate Status to Hired

After a candidate accepts a job, you can change their status to hired.

Procedure

1. Ensure that the applicant has a completed and approved Offer Details record.

   → Tip

   Offer Approval populates the *Manage Pending Hires* table in Admin Center. If an applicant doesn't receive an offer approval that is approved before entering the *Ready to Hire* (Hirable) status, they'll **not** show up in the *Manage Pending Hires* list.

2. Change the applicant’s status to the *Ready to Hire* (Hirable) status. The applicant appears in the *Manage Pending Hires* list in Admin Center.
3. In *Manage Pending Hires*, the user can then *Hire* the appropriate candidate. Once the candidate is hired:
    a. Candidate is added to Employee Central and all data outlined in the integration template is transferred to Employee Central.
    b. As long as the Employee ID field is included in the external candidate profile, the candidate's new employee ID is visible.
    c. The candidate now has an internal candidate profile. The new internal candidate profile contains minimal data and duplicates the external candidate profile unless Candidate to Employee Conversion is configured.
    d. Candidate to Employee Conversion is done by the system.

6 Building Job Profiles for Applications and Hiring

You can use Job Profile Builder so you can create and configure job families, roles, competencies, and behavior that help you compose job descriptions that can help eliminate bias to capture only critical aspects for job roles that avoid unnecessary criteria that can produce bias.

Job Family Groupings

The core HR system is the central repository for all data related to how you manage your workforce. Inevitably, this data gets grouped into categories, such as job families and organizational levels. What companies rarely explore is the demographic breakdown of these categories.

Your organization can leverage your core HR system to ensure that job families and groupings are inclusive and representative of the kind of diversity you want at your company. Differences across job families can perpetuate pay disparities because pay decisions are made by comparing employees working in the same jobs. When a job family is mainly populated by female employees, pay benchmarks for employees in these jobs are likely lower compared to a job family that is primarily populated by men.

Job Critical Components Associated With Roles

Having a core HR system that supports flexible work weeks that are outside of the 40-hour office work week that influences how the job is marketed and recruited, and what an individual in that role is expected to accomplish, and what skills and capabilities ensures a good fit. You can record and communicate out to hiring managers and other stakeholders what the true requirements are for a job.

For example, listing key skills and capabilities as a requirement for a job when you want to ensure hiring criteria such as physical location isn't listed as necessary qualifications unless it is necessary to perform that role. You can use Job Profile Builder within SAP SuccessFactors platform to build appropriate job descriptions and requirements.

Job Descriptions

Job Profile Builder tool within SAP SuccessFactors solutions provide definition of critical aspects for a role. Information taken from Job Profile Builder give recruiters a starting point in crafting the job descriptions that by highlighting skills and capabilities that are not truly necessary for success in a role, which is a practice that have deterred diverse talent from applying and describe the job using appropriate and relevant terminology

Competencies

With the performance management functionality within SAP SuccessFactors Performance & Goals, you can automatically bring other sources of information into the performance evaluation form, such as competencies. Management competencies are evaluated along with employee goals and factored in to a broader score of performance. Competencies can be used across organizations, or they can be applied more specifically to certain teams or organizational levels.

Even though skills, capabilities, and competencies necessary for success within leadership roles shouldn't be associated with demographic characteristics, unconscious bias can cause diverse talent to be overlooked for positions.

Assigning Behaviors to Competencies to Eliminate Bias

Behavior based competencies enables assessment of the aspects of job performance that are not necessarily tied to employee goals but important for embodying the culture and values of the organization and therefore are also critical aspects of performance.

Many effective managers display family supportive supervisory behaviors, with the understanding and support when employee family obligations such a children or elderly parents medical appointments, takes precedence over work. These behaviors have been linked to increased job satisfaction, engagement, and commitment among employees. But when this level of support isn't present, primary caregivers are disadvantaged, and in many parts of the world, primary caregivers are women and employees within a certain age range.

Assigning supporting behaviors to competencies for managers can be used to evaluate them to the extent when they display supportive behaviors that is important in engagement and job satisfaction of all employees.

7 Job Profile Builder

7.1 What is Job Profile Builder?

Job Profile Builder enables you to build complete job profiles with multiple content types and create *Families* and *Roles*. You can use *Skills Management* to capture employee skills within the Employee Profile.

Job Profile Builder or **JPB** is a successor to the legacy Job Description Manager or **JDM**. It is, therefore, sometimes also known as *JDM v2.0*. Job Profile Builder replaces legacy **Families**, and **Roles**. It's a flexible and intuitive way to identify the complete elements of job descriptions to share them with your organization. You can use Job Profile Builder to define your job profiles with or without Employee Central.

Job Profile Builder allows you to build complete job profiles with multiple content types, and allows creation of individual performance profiles based on established roles within **Families** and **Roles**. You can find candidates with the right fit for promotions and new positions, development strength, and more opportunities using detailed job descriptions.

Job Profile Builder is built on top of Metadata File Framework or **MDF**. When you use **MDF**, you can create and manage database object definitions, relationships, and hierarchy.

As a best practice, use both Job Profile Builder and *Skills Management*.

7.2 Comparison of Job Description Manager and Job Profile Builder

Job Profile Builder (JPB) has many features in common with Job Description Manager (JDM) and also some distinguishing features. This list gives you a comparison of the functionalities.

The Job Profile Builder uses the Metadata Framework (MDF) to store objects and data.

Feature Comparison of Job Description Manager and Job Profile Builder

Topic	Job Description Manager	Job Profile Builder	Notes
Families and Roles	X	X	
Competency Libraries	X	X	
Competency Localization	X	X	
Defining and Mapping Competencies to Job Roles	X	X	
Assigning Relative Weights to Competencies Mapped to Job Roles	X	X	

Topic	Job Description Manager	Job Profile Builder	Notes
Assigning Behaviors to Competencies	X	X	
Assigning of Behaviors to Job Roles	X	X	Behaviors are assigned to Competencies. Competencies are assigned to job roles. Behaviors can't be assigned to job roles directly. This feature is the same for JDM and JPB.
Localized Job Role Description		X	You can configure your job profiles in JPB. Design your job profile using the library content or text fields that can all be localized and configured to fit your needs.
Mapping of Same Job Code to Multiple Job Roles	X		
Mapping of Succession Data Model Standard Elements	X		You can map job code as well as division, department, location, or 15 custom fields, from Succession Data Model to job roles in JDM. JPB only supports mapping of job code to a job role.
Position-Based Job Profiles		X	
Skills Library		X	JPB provides a Skills Library with access to sample content including proficiency levels mapped to job roles.
Skills Assessment		X	JPB supports rating of Skills Proficiency.

7.3 Enabling Job Profile Builder in Provisioning

This topic gives details about enablement of Job Profile Builder in Provisioning.

Context

Current implementations begin with Job Description Manager and have pre-existing Job Description Manager data in the system. Thus, as a first step, use the *Check Tool* to validate your Job Description Manager data before migrating to Job Profile Builder. Next, correct any issues found by the check tool with your Job Description Manager data to prepare for migration from Job Description Manager to Job Profile Builder. Note that any corrections to be made are done from Provisioning.

→ Remember

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

Procedure

1. Log in to Provisioning.
2. Go to *Company Settings* and enable the following:
    - *JDM v2.0/Skills Management*
    - *Role-based Permission*
    - *Enable Generic Objects*

    Note

    If you have an existing implementation of Job Description Manager, once *JDM v2.0/Skills Management* is enabled, setting for Job Description Manager is disabled and the functionality to access Job Description Manager data is no longer available. You're able to access your Job Description Manager data from Provisioning after enablement.

Next Steps

- Migrate existing data to Job Profile Builder and Center of Capabilities.
- Set up role-based permissions for Job Profile Builder data objects.

Using Check Tool for Job Description Manager and Job Profile Builder [page 80]
Before migrating to Job Profile Builder, run data validation checks for Job Description Manager. In addition, check for any issues during migration in Job Profile Builder *Check Tool* validations.

Migrating from Job Description Manager to Job Profile Builder [page 82]
Migration from Job Description Manager to Job Profile Builder involves the migration of data structures such as your company's competencies, job families, and job roles.

7.3.1 Using Check Tool for Job Description Manager and Job Profile Builder

Before migrating to Job Profile Builder, run data validation checks for Job Description Manager. In addition, check for any issues during migration in Job Profile Builder *Check Tool* validations.

Prerequisites

You have permission to *Check Tool*.

> → Tip
>
> Find the permissions under *Administrator Permissions* > *Check Tool*.

Context

Once you enable Job Profile Builder, you no longer have access to the legacy competency libraries from Admin Center. Make any changes to the Job Description Manager data after enablement of Job Profile Builder and before migration of data to Job Profile Builder from Provisioning.

Procedure

1. Go to *Admin Center* > *Check Tool*.

   The *Check Tool* page opens displaying the results of the first tab **System Health**.
2. Depending on the check type of the check you're interested in, select the corresponding tab.

Tab	Description
System Health	Displays configuration checks that have returned errors or warnings after the last run. We recommend you solve these in a timely manner. To display all checks, select all result types in the *Result Type* search filter and select *Go*.
Migration	Displays the migrations that are still pending, either because the check tool couldn't automatically migrate all issues or because new issues have been found after the last run. We recommend you solve these in a timely manner.

Tab	Description
	To display all checks, turn on the *Show completed migrations also* search filter and select *Go*.
Validation	Displays a list of all validation checks. **Note** Validation checks require one or more parameters for execution, therefore we can't run these checks automatically. You need to enter input parameters and run the corresponding check manually to get results.

3. Pick the relevant option from the dropdown under *Application* and then click *Go*.
   - **`Job Description Manager`**
     There are multiple checks available that validate your Job Description Manager data for migration. Any issues found by the checks for Job Description Manager are then corrected from Provisioning.
   - **`Job Profile Builder`** - Run the relevant Job Profile Builder checks to validate data once data have been migrated from Job Description Manager to Job Profile Builder.

Task overview: Enabling Job Profile Builder in Provisioning [page 78]

Related Information

Migrating from Job Description Manager to Job Profile Builder [page 82]

7.3.1.1 List of Supported HTML Tags in Competency Descriptions

Competency descriptions in Job Profile Builder can only include certain HTML tags and cannot include any JavaScript. Refer to the following for the supported HTML tags.

List of Supported HTML Tags in Competency Descriptions

List of Supported HTML Tags in Competency Descriptions
p
a
strong
em
u

List of Supported HTML Tags in Competency Descriptions
ol
ul
li

7.3.2 Migrating from Job Description Manager to Job Profile Builder

Migration from Job Description Manager to Job Profile Builder involves the migration of data structures such as your company's competencies, job families, and job roles.

Prerequisites

- You have enabled Job Profile Builder.
- You've disabled *Disable autocompletion find in the UI* in Provisioning.
- You've checked and prepared your Job Description Manager data for migration. See **Context** and **Related Information** for additional guidance.

Context

Current implementations begin with Job Description Manager and have pre-existing Job Description Manager data in the system. Thus, as a first step, use the *Check Tool* to validate your Job Description Manager data before migrating to Job Profile Builder. Next, correct any issues found by the check tool with your Job Description Manager data to prepare for migration from Job Description Manager to Job Profile Builder. Note that any corrections to be made are done from Provisioning.

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

Procedure

1. Go to *Company Settings* for your company in Provisioning.
2. Go to *JDM v2.0/Skills Management*.
3. Provide username of an administrator for the migrate job in the text box.

4. Select *Migrate* to trigger the migration job.

> ⚠ Caution
>
> After migration, don't change Family and Job Role data from Provisioning. Any changes made from Provisioning aren't synced with data in the system.

Next Steps

Go to *Admin Center* > *Check Tool* and then refer to the instructions mentioned in Using Check Tool for Job Description Manager and Job Profile Builder [page 80].

> ⓘ Note
>
> Job Description Manager data is locale-specific. When migrating data to Job Profile Builder, the system creates Job Profile Builder data in English U.S. locale whatever the locale of existing data. Post migration, export Job Profile Builder data, add translations for the locales you use and reimport the data.

Task overview: Enabling Job Profile Builder in Provisioning [page 78]

Related Information

Using Check Tool for Job Description Manager and Job Profile Builder [page 80]
Using Check Tool for Job Description Manager and Job Profile Builder [page 80]

7.4 Security and Visibility for Job Profile Target Role-based Permissions

You can control security and visibility for your job profile target role-based permissions using Metadata Framework Configure Object Definitions tool.

Overview About Security for MDF Using Role-based Permissions

You can add security based on role-based permission to the MDF object definition, which can be added to objects, field, and association levels. Setting up security allows you to control which users can view, edit, or import and export data in an object or field. With MDF you can set up security at the more granular field level. For objects and fields, you can control access based on roles within the system

Security has to be added so you can view or edit target role-based permissions for the following Job Profile Builder permissions:

- *Job and Skills Visibility*
- *Skill Profile*
- *Rated Skills*

Related Information

Setting Up Job and Skills Profile Visibility [page 84]
Setting Up Visibility for Skill Profile [page 85]
Setting Up Visibility for Rated Skills [page 85]
More about Using MDF:
Implementing the Metadata Framework
Helpful Topics from Implementing the Metadata Framework
Overview of Setting Up Security for MDF Using Role-Based Permissions (RBP)
Adding Security for Object Definition

7.4.1 Setting Up Job and Skills Profile Visibility

You can set up *Job and Skills Profile* visibility role-based permissions using the *Configure Object Definitions* tool.

Procedure

1. Go to *Admin Center* > *Configure Object Definitions* .
2. Go to *Search* > *Object Definition* > *Job Profile*
3. Go to *Take Action* > *Make Correction*
4. Go to the *Security* section towards end of the page and complete the form:

Field	Set to
Secured	**`Yes`**
Permission Category	**`Manage Job & Skill Profile Visibility`**
RBP Subject User Field	Leave it blank
CREATE Respects Target Criteria	**`No`**

5. Select *Save* to finish.

7.4.2 Setting Up Visibility for Skill Profile

You can set up *Skill Profile* visibility role-based permissions using the Configure Object Definitions tool.

Procedure

1. Go to *Admin Center* > *Configure Object Definitions*.
2. Go to *Search* > *Object Definition* > *Skill Profile*
3. Go to *Take Action* > *Make Correction*
4. Go to the *Security* section towards end of the page:

Field	Set to
Secured	`Yes`
Permission Category	`Manage Job & Skill Profile Visibility`
RBP Subject User Field	Leave blank.
CREATE Respects Target Criteria	`No`

5. Select **Save** to finish.

7.4.3 Setting Up Visibility for Rated Skills

You can set up *Rated Skills* visibility role-based permissions using the Configure Object Definitions tool.

Procedure

1. Go to *Admin Center* > *Configure Object Definitions*.
2. Go to *Search* > *Object Definition* > *Rated Skills*
3. Go to *Take Action* > *Make Correction*
4. Go to the *Security* section towards end of the page and complete the form:

Field	Set to
Secured	`Yes`
Permission Category	`Manage Job & Skill Profile Visibility`
RBP Subject User Field	Leave blank.
CREATE Respects Target Criteria	`No`

5. Select **Save** to finish.

7.5 Permissions Required for Using Job Profile Builder

You can set up basic role-based permissions to enable Job Profile Builder using the *Manage Permission Roles* tool.

The role-based permissions can be provided to a target population. The following table provides the list of role-based permissions

Permissions for Job Profile Builder

Permission Name	Permission Location	Description
Manage Job Profile Template	Manage Job Profile Builder	
Manage Job Profiles	Manage Job Profile Builder	
Configutre Job Profile Acknowledgement Settings	Manage Job Profile Builder	
Manage Job Profile Content Import/Export	Manage Job Profile Builder	
Manage Job Profile Content	Manage Job Profile Builder	
Job Profile	Manage Job & Skill Profile Visibility	You must enable security and visibility settings from the *Job Profile* object using the *Configure Object Definitions* tool so that *Manage Job & Skill Profile Visibility* is enabled in role-based permission. You can set additional permissions by selecting different actions.
JobReqJobProfile	Manage Job & Skill Profile Visibility	
Skill Profile	Manage Job & Skill Profile Visibility	You must enable security and visibility settings from the *Job Profile* object using the *Configure Object Definitions* tool so that *Manage Job & Skill Profile Visibility* is enabled in role-based permission. You can set additional permissions by selecting different actions.
Skill Profile.Rated Skills (Rated Skills)	Manage Job & Skill Profile Visibility	

Related Information

List of Role-Based Permissions

7.6 Configuring Skill Profile in People Profile

You can enable your employees to edit their *Employee Self-Rating* and *Manager Rating* in People Profile.

Prerequisites

> ⓘ Note
>
> You can use the skill profile if you've not enabled Talent Intelligence Hub. If you've enabled Talent Intelligence Hub, it is recommended that you use the Growth Portfolio to manage your skills.

- Visibility for Rated Skills enabled
- Permission for Rated Skills enabled
- People Profile

Procedure

1. To add Skill Profile to People Profile, go to *Admin Center* > *Configure People Profile*.
2. Locate either Profile or *Skill Profile* to select.

   When you've selected the section you want to edit, the *Edit Section* navigation appears next to the *Configure People Profile* sections.
3. Select the empty *subsection* below your People Profile section.

   The *Edit Subsection* navigation page next to the *Configure People Profile* sections is activated.
4. Go to the *Edit Subsection* navigation page and enter in the name of your subsection.
5. Select *Save*
6. Select the empty block next to your new subsection.

   When you select the empty block, the *Available Blocks Drag and drop blocks to create profile* navigation page appears next to the *Configure People Profile* sections.
7. Go to the *Available Blocks* page and enter in `Skill Profile` in the search bar.

   The Skill Profile People Profile block appears below the search bar.

   > → Tip
   >
   > If Skill Profile doesn't show up, visibility or permissions wasn't set up.
8. Drag and drop the Skill Profile over to the empty block next to the subsection you want.
9. Select *Save* to finish.

Related Information

[Adding a Section to the People Profile]
[Adding a Block to the People Profile]
[Editing a Subsection]

7.7 Configuring Skills Profile Block for People Profile

You can configure Skill Profile for your instance.

Prerequisites

> ⓘ Note
>
> You can use the skill profile if you've not enabled Talent Intelligence Hub. If you've enabled Talent Intelligence Hub, it is recommended that you use the Growth Portfolio to manage your skills.

- Visibility for Rated Skills enabled.
- Permission for Rated Skills enabled.
- People Profile enabled.
- Skill Profile permissions enabled in role-based permission under *Employee Views*.

Procedure

1. Go to *Admin Center* > *Configure Employee Files*.

   You're directed to the *Design Employee Files Layout* page, where you customize your People Profile blocks.
2. Find the *Skill Profile* block under the *View Name* column.
3. From the *Skill Profile* row, go to the *Show/Hide* column and select the checkbox that corresponds with *Skill Profile*.
4. Select *Save* to finish.

7.8 Adding Job Families and Roles from SuccessStore

You can create families and roles by importing them from SuccessStore to use families and roles that are predefined according to leading practices.

Context

SuccessStore includes a prepackaged set of job families, their job roles, and the skills associated with the roles. They offer you a head start for your family, role, and skill strategies. You can also add families and roles individually in SAP SuccessFactors.

Procedure

1. Go to *Admin Center* > *Manage Job Profile Content* and then select *Set Up Families and Roles*.
2. Select *Add Families from SuccessStore*.

   You see *Manage SuccessStore Skill Content*.
3. Select the family to see a list of roles in the family and the individual roles in the family to see the role's skills and other details.
4. Decide what you want to import:
   - Select *Add Role* to add the role only.
   - Select *Add Role and Family* to add the role and its family.
   - Select *Also add mapped skills* to add the skills that are in the role.
5. Select *Add* to add the family, role, or skills that you selected.
6. Select *I'm done* if you are done adding families, roles, and skills.

7.8.1 Adding Job Families Without SuccessStore

Create job families without SuccessStore if you have needs that SuccessStore doesn't meet or you want to create individual families.

Procedure

1. Go to *Admin Center* > *Manage Job Profile Content* and then select *Set Up Families and Roles*.
2. Select *Create Family* in the *Families* tab.
3. Enter a name for the family in *Family Name*.

Most organizations have a standard for naming job families. Name your family according to the strategy of your organization.

4. Select *Map Skills* to map skills to the family.

   You map skills to job families so that you can set a proficiency for individual roles in the family. The proficiency is the level of skill that role should demonstrate. You can use the proficiency in many places in SAP SuccessFactors. For example:
   - Succession Planning can use skill proficiency to understand if employees have the proficiency in a role's skills to move into the role.
   - Career Development Planning can use the difference between skill proficiency to see the gaps that employees should cover to enter into a new job role.

   > ⓘ Note
   >
   > You can map skills later by editing the job family.

5. Click *Create Family*.

7.8.2 Creating Job Roles Without SuccessStore

Create job roles without SuccessStore if you have needs that SuccessStore doesn't meet or you want to create individual roles.

Procedure

1. Go to *Admin Center* > *Manage Job Profile Content* and then select *Set Up Families and Roles*.
2. Select *Create Role* in the *Roles* tab.
3. Enter a name for the role in *Role Name* and select its family in *Family*.

   Your organization typically has a system for naming roles that makes sense for your business and a strategy for managing roles in families. Follow your organization's strategy.
4. To map with job codes, select the *Map Job Codes* button and then find the job code in *Add Job Code*.
5. Select *Save Role* to finish.

7.8.3 Relationship between Family, Roles, and Job Codes

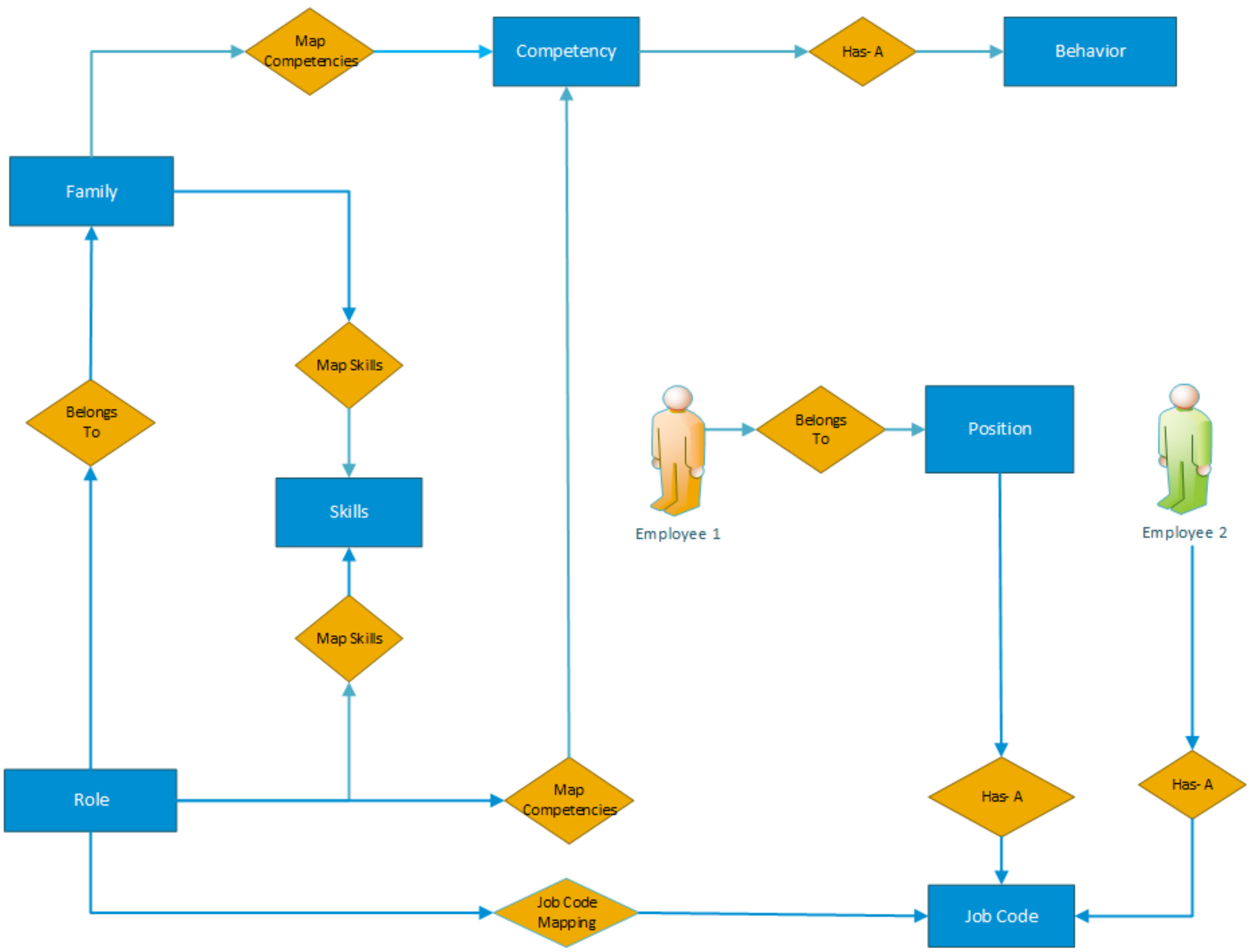
This topic describes and gives examples of the relationships between *Families*, *Roles*, *Job Codes*, *Job Templates*, and *Job Profiles*.

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

About Families, Roles and Job Codes

- A family can have multiple roles.
- One role can have multiple job codes.
- One job code can be associated with multiple employees.

> **Note**
>
> Job code of type JOBCODE is from the User Data File JOBCODE field. Job code of type JOBCLASSIFICATION is from the MDF Job Classification object. When mapping job codes, those codes that you see appended with "- FO" are of type JOBCLASSIFICATION. It's recommended to use JOBCLASSIFICATION if you have Employee Central implemented and JOBCODE if you don't have an Employee Central implementation in your instance.



Relationship between Family, Role, Job Code, Job Profile Template, and Job Profile

7.9 Job Profile Templates

Customizable Job Profile Templates with easy-to-use rich text editing (RTE) capabilities enable you to create a consistent look-and-feel for job profiles across job families.

Job Profile Templates contain content types, sections order, required sections definitions, and formatting, but not actual content. You can choose to have one job profile template for all roles within your organization or use different templates per role. For example, a manufacturing organization may want to use one job template for all plant staff and another for all administrative staff, due to compliance requirements.

Job profile templates can be connected to single or multiple job families.

1. Creating a New Job Profile Template [page 92]
   This topic gives detailed steps on how to create a new job profile template for *Job Profile Builder* using the *Manage Job Profile Templates* tool.
2. Configuring Sections for Your Job Profile Templates [page 93]
   You can customize your Job Profile Template sections to restrict access to administrators, viewable for internal and external *Job Requisitions* postings, and to enable required sections.

7.9.1 Creating a New Job Profile Template

This topic gives detailed steps on how to create a new job profile template for *Job Profile Builder* using the *Manage Job Profile Templates* tool.

Procedure

1. To launch the *design your template* tool, follow these steps:
   a. Go to *Admin Center* > *Manage Job Profile Templates*
   b. Select *Create Template* that opens the *Create Job Profile Template* form.
   c. Enter in the name of your job profile template.
   d. Select *Add* button to add job family you want to associate with your job profile template.
   e. Select *Next* that opens up the *Design your template* page.
2. Select *I'm done* to finish.

Next Steps

You can edit and customize your job profile template. To learn more about customizing your job profile template, refer to the Configuring Sections for Your Job Profile Templates [page 93] topic.

Task overview: Job Profile Templates [page 91]

Next task: Configuring Sections for Your Job Profile Templates [page 93]

7.9.2 Configuring Sections for Your Job Profile Templates

You can customize your Job Profile Template sections to restrict access to administrators, viewable for internal and external *Job Requisitions* postings, and to enable required sections.

Procedure

1. Select the section you want to edit until the gear icon appears.
2. Select the gear icon.

   When you select the gear icon, display options appear to the right of your section.
3. To configure your display options, select any of these options:

Display Option	More Information
Make this a required section	When you select this option, the section is marked as a required section when you create job profile content. The red letter R appears next to that section in your job profile template.
Section visible to Admins only	When you select this option, only administrators view that section when they receive job profile acknowledgments.
Show in Job Requisition	When you select the *Show in Job Requisition*, you can select checkbox for any or all these options: • Show in external posting • Show in internal posting When you select this option for **Competencies** section, the Job Profile Builder competencies are shown in *Job Profile*, *Interview Central*, and *View Candidate Ratings* screens. **Restriction** The *Show in Job Requisition* is **NOT** available when the *Section visible to Admins only* option is selected.

4. Use these options to change your section title and section content style:
   - Go to *TITLE STYLE* to change your *Font Size*, style of text, and *Heading Level*.

     > **Note**
     >
     > Making changes to the heading level will not change the content's appearance on the job requisition details or job posting but will only be beneficial for users who use screen readers to access the content.
   - Go to *CONTENT STYLE* to change font and paragraph style.
5. Select **I'm done** to finish and save your changes.

Task overview: Job Profile Templates [page 91]

Previous task: Creating a New Job Profile Template [page 92]

7.10 Job Profiles

A Job Profile contains all the elements that can define a job or a position in your company.

A job profile can be associated to a **role** or to a **role and position** and is then a Role or Position based job profile respectively.

As an administrator, you can build your Job Profiles in the system, or have other roles be involved in building the profiles where an approval workflow is also in place.

What You Need to Know About Creating Job Profiles Without Workflow [page 94]
: You can create your job profiles directly using the Manage Job Profiles as an administrator when you've created your job family, role, or position associated with a job profile template.

Using Workflow for Creating and Approving Job Profiles [page 97]
: You can use Job Profile Builder Workflow for approving new job profiles once you have family or roles created. Workflows help administrators and management to ensure that job profiles have been reviewed before publishing.

Tips for Creating Job Profiles [page 103]
: This table describes some issues you see in JPB including why you see the status icon for a job family, job role, or job position when in the initial *Create Job Profile* page.

7.10.1 What You Need to Know About Creating Job Profiles Without Workflow

You can create your job profiles directly using the Manage Job Profiles as an administrator when you've created your job family, role, or position associated with a job profile template.

Creating Job Profiles Without Workflow

When you create a job profile using the Manage Job Profiles page, the job profile is saved as a draft and there's no workflow approval process. There's a one-on-one relationship between a role and a job profile. Use the *Create Job Profile* button when you want to create your new job profile.

Create Job Profile Page

There are two *Create Job Profile* pages. When you select the *Create Job Profile Button*, you're directed to the *Create Job Profile* page where you can select from a list that contains these three columns so you can create your job profile:

- Job Families
- Job Role
- Job Position

> → Tip
>
> *Job Position* Column may be empty if your role doesn't have a job code or job classification associated with a position.

The JPB **Position** refers to the `Position Extension` Object. `Position Extension` is an object created by the system when a job code attached to a position (`Position` MDF object) is mapped to a role. `Position Extension` object is used to store the Skills and Competencies mapped to the position.

> ⚠ Caution
>
> Changing the `Position Extension` Object manually isn't recommended.

If you only select the *Job Role* and go to *Next*, you create a **Role-Based** job profile. If you select a *Job Role* and a *Job position* and go to *Next*, you create a **Position-Based** job profile.

When you select the *Next* button, you're directed to the second *Create Job Profile* page that appears as the job profile template that's associated with your new job profile.

Your new job profile includes your family, role, and mapped skills. You can add additional information to your job profile sections.

Parent topic: Job Profiles [page 94]

Related Information

Using Workflow for Creating and Approving Job Profiles [page 97]
Tips for Creating Job Profiles [page 103]
Creating Job Profiles Without Workflow [page 96]

7.10.1.1 Creating Job Profiles Without Workflow

As an administrator, you can create and activate job profiles using the Manage Job Profiles tool you can access from Admin Center.

Prerequisites

- Job Profile Template

Procedure

1. Go to *Admin Center* > *Manage Job Profiles*.

   When you select Manage Job Profiles, you're directed to the *Job Profile* page that lists job profiles.
2. From the *Job Profile* page, select **`Create Job Profile`** to create your job profile.

   When you select the *Create Job Profile* button, you're directed to the *Create Job Profile* page that contains three columns:
   - *Job Families*
   - *Job Role*
   - *Job Position*
3. Select the family that you want under the *Job Families* column.
4. Select the role that you want under the *Job Role* column.

   > Note
   >
   > There's a 1:1 relationship between a role and profile.
5. Select the job position that you want under the *Job Position* column.

   > → Tip
   >
   > *Job Position* column is empty if your role doesn't have a job code or job classification associated with a position.
6. To display the job profile template, select **`Next`**.

   When you select the *Next* button, the form that contains sections for your associated job profile template appears.
7. Select *Type Job Profile Name* with your mouse that activates an empty text field.
8. Enter in your profile name in the *Type Job Profile Name* text field.
9. Add all required or additional content to the text fields in your job profile sections.
10. To save your job profile, select the **`I'm done`** button.

→ Tip

A dialog prompt appears to fill out any required sections that are incomplete before you can activate your job profile.

⚠ Caution

The *I'm done* button remains grayed out until you add a job profile name.

When you select the *I'm done* button, you're directed back to the *Job Profile* page and your saved job profile is in draft status.

11. To activate your job profile, locate your job profile from the *Job Profile* and select the gear icon under the *Actions* column.
12. From the gear icon, select **`Activate`** that opens up a dialog prompt that reads: **Are you sure you want to activate this profile?**
13. Select **`Yes`** to activate your job profile. You can now use your new job profile.

7.10.2 Using Workflow for Creating and Approving Job Profiles

You can use Job Profile Builder Workflow for approving new job profiles once you have family or roles created. Workflows help administrators and management to ensure that job profiles have been reviewed before publishing.

Creating Job Profiles Using Workflow

When you've created your job family and role and associated with a job profile template, you're ready to create your job profile. Before you start creating job profiles, set up a workflow for new and changed job profile approvals.

→ Tip

You can't map additional skills or role-based competencies to that same job profile once a job profile is in pending workflow approval status.

⚠ Restriction

When Employee Central isn't enabled, you can approve MDF workflows but you can't access the *Workflow Details* page as a proxy user.

Change Request Dialog Box

When you've selected your job family, role, and positions, and advance to the *Create Job Profile* page, the *Change Request* dialog box appears on the screen. The *Change Request* dialog box is only available when you create job profiles using People Profile.

You can view the approvers by selecting the *View approvers* link within the same dialog box.

Parent topic: Job Profiles [page 94]

Related Information

What You Need to Know About Creating Job Profiles Without Workflow [page 94]
Tips for Creating Job Profiles [page 103]

7.10.2.1 Configuring Job Profile Builder Workflow

Create and configure workflows so you can have an approval workflow associated with your job profiles.

Prerequisites

- Intelligent Services
- Role-based permissions using the following target permissions:
  - Manage Workflow Requests.
  - Manage WorkflowGroups.
  - Be a member of a dynamic workflow group.

Procedure

1. Go to *Admin Center* > *Manage Organization, Pay, and Job Structures* .
2. Go to *Create New* > *Workflow* .
3. Enter a unique *Workflow ID*.
4. Fill out the *Name* and *Description* text boxes.
5. Use *Approver TypeDynamic Group*.

   Dynamic Group Approver type is just one of several different approver types.
6. Pick your *Approver Role*.
7. Go to *Edit Transaction* and select *Edit with Route Change*.
8. Go to *No Approver Behavior* to select the *Skip this Step* option from the dropdown menu.
9. Go to *Respect Permission* to select *Yes* option from the dropdown menu.
10. If needed, you can configure the following by going to these sections:
    - *Workflow Contributor*

- *CC Role Contributor*

11. Select *Save* to finish.

Task overview: Using Workflow for Creating and Approving Job Profiles [page 97]

Next task: Setting Up Workflows to Appear on To-Do Lists [page 99]

Related Information

More Information on using MDF Workflows
Creating a New Workflow
Need to Know
More Information About Defining and Routing EC Workflows
Defining Workflows
Routing Workflows
More Information About Position Relationship, Setting Up Dynamic Roles, and Groups
Setting up Dynamic Roles
Setting up Dynamic Groups
Position Relationship

7.10.2.2 Setting Up Workflows to Appear on To-Do Lists

Associate the workflow you have created with your *Job Profile Draft* object. This will enable the job profile change requests to appear in workflow approvers' to-do cards.

Procedure

1. Go to *Admin Center* > *Configure Object Definitions* that takes you to the *Configure Object Definition* page.
2. Go to *Search* > *Object Definition* > *Advanced* to select *Job Profile Draft* from the *Advanced* field dropdown menu. The *Job Profile Draft* page opens up.
3. Select *Take Action* > *Make Correction*, which enables you to edit the *Job Profile Draft* object.
4. Go to *Workflow Routing* dropdown menu in your *Job Profile Draft* form to select your workflow.
5. Go to *Todo Category* dropdown menu to select *Job Profile Requests*
6. Select *Save* to finish.

Task overview: Using Workflow for Creating and Approving Job Profiles [page 97]

Previous task: Configuring Job Profile Builder Workflow [page 98]

Next task: Creating Your Job Profile with Workflow Enabled [page 100]

7.10.2.3 Creating Your Job Profile with Workflow Enabled

Create your job profiles after configuring and enabling your workflow.

Prerequisites

- Workflow is already configured for *Job Profile Draft* object.

Context

> ⓘ Note
>
> Instructions in this topic describe how to access and create job profiles with workflow using People Profile. You can still access the same menus using People Profile.

Procedure

1. Go to *Admin Center* > *My Employee File* that opens up your People Profile page.
2. Locate the *Action* menu and select *Job Profiles* option.

   > ⓘ Note
   >
   > When you go to the job profiles page directly from the *Admin Center* and create your job profile, you're creating a job profile without workflow.

   When you select *Job Profiles*, you're directed to the *Job Profile* page that list job profiles. This page looks similar to Manage Job Profiles page.
3. Select **`Create Job Profile`** to create your job profile.

   When you select the *Create Job Profile* button, you're directed to the first *Create Job Profile* page that contains three columns:
   - *Job Families*
   - *Job Role*
   - *Job Position*
4. Select the family that you want under the *Job Families* column.
5. Select the role that you want under the *Job Role* column.

> ⓘ Note
>
> There's a 1:1 relationship between a role and profile.

6. Select the job position that you want under the *Job Position* column.

    > → Tip
    >
    > *Job Position* Column may be empty if your role doesn't have a job code or job classification associated with a position.

    The JPB **Position** refers to the `Position Extension` Object. `Position Extension` is an object created by the system when a job code attached to a position (`Position` MDF object) is mapped to a role. `Position Extension` object is used to store the Skills and Competencies mapped to the position.

    If you only select the *Job Role* and go to *Next*, you create a **Role-Based** job profile. If you select a *Job Role* and a *Job Position* and go to *Next*, you create a **Position-Based** job profile.

    > ⚠ Caution
    >
    > Changing the `Position Extension` Object manually isn't recommended.

7. Select **`Next`**.

    When you select the **`Next`** button, the job profile template for your job profile appears.

    > ⓘ Note
    >
    > The *Change Request* dialog appears next to the new job profile. You can view list of approvers by selecting the *View approvers* link.

8. Select *Type Job Profile Name* with your mouse and an empty text box appears.
9. From that empty text box, enter the name of your job profile.
10. Add all required or additional content to the free-form text fields in your job profile template for your job profile.
11. To save your job profile, select the **`I'm done`** button.

    > ⚠ Caution
    >
    > The *I'm done* button remains grayed out until you add a job profile name.

    You're directed back to the *Job Profile* page.
12. To locate your pending job profile request, go to the *In-workflow Job Profile* tab.

Task overview: Using Workflow for Creating and Approving Job Profiles [page 97]

Previous task: Setting Up Workflows to Appear on To-Do Lists [page 99]

Next task: Approving Job Profile Workflow Requests [page 102]

7.10.2.4 Approving Job Profile Workflow Requests

You can approve new or changed job profiles using Job Profile Builder workflow process.

Prerequisites

- Job Profile Template
- Workflow enabled for *Job Profile Draft* object.
- Workflows configured to appear on your To-Do list or homepage.
- Authorized to approve workflow requests.
- Job Profile in pending approval process status.

Context

Once you have set up your workflows, and have created your job profiles that use a workflow, you can access your pending approvals in multiple ways.

Procedure

1. Access job profile change requests.

Access using...	Description
Home Page	Find the *Job Profile* card in the *Approvals* section to access your pending approvals.
Action Search with `View my pending requests`	Type `View my pending requests` in the search box accessible anywhere in the SAP SuccessFactors application to see all your *Pending Requests*.
Manage Job Profiles	Find *Manage Job Profiles* from Action Search or Tool Search. Go to the In-workflow Job Profile to find the pending job profile requests.

2. Select the request you wish to review from the *My Workflow Requests*.

   You can access workflow and request details for the new or changed job profile.
3. To approve and finish, insert any comments if applicable and select `Approve`.

   A message appears that states that your approval is successful. To verify, you can go back to the Manage Job Profiles page. Upon approval, that job profile is in *Active* status.

Task overview: Using Workflow for Creating and Approving Job Profiles [page 97]

Previous task: Creating Your Job Profile with Workflow Enabled [page 100]

7.10.3 Tips for Creating Job Profiles

This table describes some issues you see in JPB including why you see the status icon for a job family, job role, or job position when in the initial *Create Job Profile* page.

Troubleshooting Tips for Creating Job Profiles

Job Content type	Status Message	What You Need to do
Job Families Column	When you hover over this icon, this message appears: • A job profile can't be created from this job family because it isn't associated with a template	Your job family has to be associated with a job template so you can create your job profile.
Job Role Column	When you hover over this icon, this message appears: • A job profile can't be created from this role because it's associated with one	Each role can only have one profile. You can copy a profile to another role, create a new one, or use a different one.
Job Position Column	When you hover over this icon, this message appears: • A job profile can't be created from this position because it's associated with one	There's already a job profile associated with that role and position. **Note** There's no 1:1 relationship between positions and job profiles. This icon appears with specific positions that have been associated with job profile. It's possible to create a new job profile using same role but for a different position.
	`Invalid Position` is caused by the following: • Position has been invalidated. • Position was created for a Job Classification. Job role associated with this position is then used to create a job profile. Thereafter, the position was modified to use another job classification • Job code mapping has been removed from job role after the creation of the profile.	Fix the issue causing the position to be invalid.

Parent topic: Job Profiles [page 94]

Related Information

What You Need to Know About Creating Job Profiles Without Workflow [page 94]
Using Workflow for Creating and Approving Job Profiles [page 97]

7.11 Creating Job Profile Content

Add job profile content to populate your job profiles. Additionally, Competency and Skills Library add-ons provide off the shelf industry verified content.

Creating Job Profile Content

You can add job profile content several ways:

- Add from the UI, using *Manage Job Profile Content* tool from scratch or using *SuccessStore*.
- Add using *Manage Job Profile Content Import/Export*
- Add using MDF *Import and Export Data* tool.

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

Job Profile Builder Content Types [page 105]
You can create different types of job profile content that you can add as required or optional sections in your job profile template.

Adding Job Profile Content from UI [page 107]
Job Profiles use content from available *libraries*. You can import data in bulk or build job profiles directly from *UI* using the *Manage Job Profile Content* page.

Job Profile Builder Content Object Associations [page 109]
When you create new job profile content, a GUID or *External ID Code* is generated. When you create a new Family, Role, competency, or any job profile object it contains its own unique GUID. When you map one or several job profile objects, a GUID is also generated.

Job Profile Objects Dependencies [page 109]
The table featured in this topic lists all Job Profile Builder Objects and all associated objects that can be mapped either using Manage Job Profile Content or using *Manage Job Profile Content Import/Export*. This table also includes a column that list the number of GUIDs required so you can map job profile content using *Manage Job Profile Content Import/Export* process.

Introduction to Skills [page 111]
This topic gives brief overview of how to use skills in building job profiles.

Competencies and Behaviors [page 114]
A competency is an individual's ability to perform a job that includes a set of defined behaviors.

[Creating Content Using Import and Export Process [page 120]](#)
You can perform mass creation of job profile content by importing your data using a .csv file. Your .csv file is downloaded as a template by job profile content type using the export process. You can populate your .csv template with data before starting the import process.

7.11.1 Job Profile Builder Content Types

You can create different types of job profile content that you can add as required or optional sections in your job profile template.

Job Profile Builder Content Objects and Examples

Content Type	JPB Object Name	Description	Examples
Families	Set Up Families and Roles	Is a group of jobs that involve similar types of work. May require similar training, skills, competencies, and knowledge that help organize related jobs for job profiles.	Example • Organizational Leadership • Human Resources
Roles	Set Up Families and Roles	A prescribed or expected behavior and skills associated with a specific position or status in a group or organization. When you create a role in Job Profile Builder, it can be associated with a family, job code, job classifications, and positions.	Example • Operations Manager • HR Professional
Certification	certification	Refers to confirmation of certain characteristics of an object, person, or organization that is provided by some form of external review, education, assessment, or audit.	Example • CPA • CSM • MFT
Employment Condition	Employment Condition	Condition that an employer and employee agree upon for a job that can include: work days, hours, breaks, dress code, vacation, sick days and pay.	Example • Legally authorized to Work in Xxxxxx country/region • hours of work • Ability to travel XX-XX%

Content Type	JPB Object Name	Description	Examples
Education – Degree	Education - Degree	An academic degree is a qualification awarded upon successful completion of a course of study in higher education such as a college or a university.	**Example** • Bachelors • MBA • Associates Degree
Education – Major	Education - Major	A subject for field chosen by a student to represent their principal interest where their efforts are focused.	**Example** • Engineering • Business • Administration • Law
Interview Question	Interview Question	A conversation when questions are asked and answers are given. One person acts in the role of the interviewer and the other in the role of the interviewee.	**Example** • *Tell me about a time when you had to solve a complex problem.* • *How many years of experience do you have?*
Job Responsibility	Job Responsibility	Is a list that an individual can use for general tasks, functions, and responsibilities for specific positions.	**Example** • Complete onboarding process in HRIS System • Ensure that warehouse is prepared with appropriate amounts of materials
Physical Requirement	Physical Requirement	Physical and mental functions required to perform for a job.	**Example** • Ability to stand 3–4 hours per day • Ability to lift 30 lbs. overhead
Relevant Industry	Relevant Industry	Is a list of industries that can be set up. Having this content help connect generic roles to that specific industry.	Project Manager role is different within a telecommunication industry as compared to a project manager that works for a financial institution.

Content Type	JPB Object Name	Description	Examples
Skill	Skill	Knowledge and experience required for job that can be developed through a mix of formal training, education, and experience.	Example • Project Management Methodology • Business Process Modeling • Conflict Resolution

> Note
>
> Job code of type JOBCODE is from the User Data File JOBCODE field. Job code of type JOBCLASSIFICATION is from the MDF Job Classification object. When mapping job codes, those codes that you see appended with "- FO" are of type JOBCLASSIFICATION. It's recommended to use JOBCLASSIFICATION if you have Employee Central implemented and JOBCODE if you don't have an Employee Central implementation in your instance.

> Note
>
> Not all job profile content is included within this table.

Parent topic: Creating Job Profile Content [page 104]

Related Information

Adding Job Profile Content from UI [page 107]
Job Profile Builder Content Object Associations [page 109]
Job Profile Objects Dependencies [page 109]
Introduction to Skills [page 111]
Competencies and Behaviors [page 114]
Creating Content Using Import and Export Process [page 120]

7.11.2 Adding Job Profile Content from UI

Job Profiles use content from available *libraries*. You can import data in bulk or build job profiles directly from *UI* using the *Manage Job Profile Content* page.

Prerequisites

You have permission to *Manage Job Profile Content*.

Context

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

Procedure

1. Go to *Admin Center* > *Manage Job Profile Content*.
2. Go to *Select Content Type* dropdown menu to select the job profile content you want to add or modify.

   > ⓘ Note
   >
   > There are several content types that you can manage that contains data required to build job profiles. You can perform searches to find either employees and candidates you need that have the knowledge, skills, and abilities to maximize performance and productivity. The creation of most content types is straightforward and involves adding descriptions in addition to setting up your content types as active.

   > ⓘ Note
   >
   > Job code of type JOBCODE is from the User Data File JOBCODE field. Job code of type JOBCLASSIFICATION is from the MDF Job Classification object. When mapping job codes, those codes that you see appended with "- FO" are of type JOBCLASSIFICATION. It's recommended to use JOBCLASSIFICATION if you have Employee Central implemented and JOBCODE if you don't have an Employee Central implementation in your instance.

Task overview: Creating Job Profile Content [page 104]

Related Information

Job Profile Builder Content Types [page 105]
Job Profile Builder Content Object Associations [page 109]
Job Profile Objects Dependencies [page 109]
Introduction to Skills [page 111]
Competencies and Behaviors [page 114]
Creating Content Using Import and Export Process [page 120]

7.11.3 Job Profile Builder Content Object Associations

When you create new job profile content, a GUID or *External ID Code* is generated. When you create a new Family, Role, competency, or any job profile object it contains its own unique GUID. When you map one or several job profile objects, a GUID is also generated.

Dependencies for Job Profile Objects

With *MDF* objects, you can have a **parent** and child objects. Job Profile content that is considered to be the **parent** has to be created first. If you map child objects with a parent object using the import process, it can fail if the parent does not exist or there is no GUID present in your import file.

When you create your new family or role using the Manage Job Profile Content tool, you can see the *GUID* or *External Codes* associated with it.

Parent topic: Creating Job Profile Content [page 104]

Related Information

Job Profile Builder Content Types [page 105]
Adding Job Profile Content from UI [page 107]
Job Profile Objects Dependencies [page 109]
Introduction to Skills [page 111]
Competencies and Behaviors [page 114]
Creating Content Using Import and Export Process [page 120]

7.11.4 Job Profile Objects Dependencies

The table featured in this topic lists all Job Profile Builder Objects and all associated objects that can be mapped either using Manage Job Profile Content or using *Manage Job Profile Content Import/Export*. This table also includes a column that list the number of GUIDs required so you can map job profile content using *Manage Job Profile Content Import/Export* process.

Job Profile Objects with Dependencies

Job Profile Builder Object	Required number of GUIDs	Associated Object
Family	2	Family - Family Skills
	2	Family - Family Competencies

Job Profile Builder Object	Required number of GUIDs	Associated Object
Role	2	Role - Mapped Skills
	2	Role - Job Code
	2	Role - Mapped Competencies
	2	Role - mapped Talent Pools
	3	Role - Mapped Competency Behaviors
Competency	2	Competency - Behaviors
	2	Competency - Competency Types
Education	2	Education - Degree
	2	Education - Major
Job Profile	2	Job Profile - headers
	2	Job Profile - Certifications
	2	Job Profile - Physical Requirements
	2	Job Profile - Relevant Industries
	2	Job Profile - Degrees
	2	Job Profile - Employment Conditions
	2	Job Profile - shortdescriptions
	2	Job Profile - Competencies
	2	Job Profile - Majors
	2	Job Profile - Compensation Data
	2	Job Profile - Skills
	2	Job Profile - lLong Descriptions
	2	Job Profile - footers
	2	Job Profile - Job Responsibilities
	2	Job Profile - Interview Questions
Job Template	2	Job Template - sections
	2	Job Template - Assigned Families

Parent topic: Creating Job Profile Content [page 104]

Related Information

Job Profile Builder Content Types [page 105]
Adding Job Profile Content from UI [page 107]
Job Profile Builder Content Object Associations [page 109]
Introduction to Skills [page 111]
Competencies and Behaviors [page 114]
Creating Content Using Import and Export Process [page 120]

7.11.5 Introduction to Skills

This topic gives brief overview of how to use skills in building job profiles.

About Skills

Possessing skills is having knowledge and experience required for the job. Skill is developed through a mix of formal training, education, and experience. If clear definitions are given for proficiency levels, people can assess their own skills:

> Example
>
> Examples of skills:
>
> - Data Entry
> - Administrative Document Design
> - Coaching and Counseling

Parent topic: Creating Job Profile Content [page 104]

Related Information

Job Profile Builder Content Types [page 105]
Adding Job Profile Content from UI [page 107]
Job Profile Builder Content Object Associations [page 109]
Job Profile Objects Dependencies [page 109]
Competencies and Behaviors [page 114]

[Creating Content Using Import and Export Process [page 120]]
[Creating Skills Using UI [page 112]]
[Using SuccessStore to Create Skills [page 112]]
[Adding Proficiencies for Skills [page 113]]

7.11.5.1 Creating Skills Using *UI*

This topic gives a detailed overview on how to create skills using *UI*.

Procedure

1. Go to *Manage Job Profile Content* > *Skill* and select *Create Skill* that opens up the *Create New Content (Skill)* page.
2. Go to the *Skill Name* field box to enter in the name of the skill.
3. Go to the *Library* field box to start entering in the library you want.
4. Go to the *Category* field box to start entering in the category you want for your skill.
5. Go to the *Group* field box to start entering in the job group you want.
6. Go to *Definition* rich editor box to enter in the definition of your skill.
7. Enter in descriptions for all proficiency levels.

   You can specify languages by selecting the pencil picker for each field for translation.
8. Select *Save* to finish.

> ⚠ Caution
>
> Once you've associated your skills and proficiency levels with a job profile, it continues to appear even when you put your skill in *Inactivate* status. We recommend that if you don't want your skill to appear any associated job profiles that you remove it by selecting *Delete* using the radio button from the Manage Job Profile Content skills list.

7.11.5.2 Using SuccessStore to Create Skills

This topic gives a brief overview about adding your skills using SuccessStore.

Using SuccessStore

You can create skills using SuccessStore, by going to *Admin Center* > *Manage Job Profile Content*. Select the *Add Skills From SuccessStore* link to add Skills.

Steps in creating skills from SuccessStore are similar in creating families and roles. You can use the browse or search SuccessStore skills from either one of these two menus:

- *Unassigned Skills Browsed By Category*
- *Family-based Skills Browsed by Job Family*

> **Note**
>
> As of Q4 2018, there are new skills available from SuccessStore.

Map Families, and Roles with Skills

You can map families and roles with any selected skills from SuccessStore. Once you select the *Add* button, you've saved the new skills available from SuccessStore.

Related Information

Introduction to Skills [page 111]
Creating Skills Using UI [page 112]
Adding Proficiencies for Skills [page 113]
For Instructions on How to Create Families Using SuccessStore, Refer to This Link:
Adding Job Families and Roles from SuccessStore [page 89]

7.11.5.3 Adding Proficiencies for Skills

When you create your new family, you can also set up the proficiency level for the skills you've mapped to your family.

Procedure

1. To add proficiency level to a family that you've created:
    a. Select the *I'm done* option to save your mapped roles and skills with your recently created family from the *Create New Content (Family)* page. This page refreshes to contain two tabs: *Family Skills* and *Family Competencies.*
    b. You can change proficiency levels for the skills you want, go to *Proficiency Level* dropdown menu to select.
    c. Select *Save Family* to finish
2. To edit proficiency level of an already existing *family*:
    a. Go to *Admin Center* > *Manage Job Profile Content* > *Set Up Families and Roles*.

b. Select the checkbox of the existing family you want to edit.
c. Go to the *gear* icon and select *edit* that opens up the *Edit: Family* page.
d. To change proficiency levels for the skills you want, go to *Proficiency Level* dropdown menu to select.
e. Select *Save Family* to finish.

7.11.5.4 Self-Ratings in Skill Profile

Your employees can edit their self-ratings in the Skill Profile section from People Profile.

Editing Employee Self-Ratings

Employees can edit their own self-ratings from Skill Profile section from People Profile, but their managers, cannot. In turn, direct managers can only edit the *Manager* rating. Employees can edit their ratings by selecting the *edit* link within their Skill Profile.

7.11.6 Competencies and Behaviors

A competency is an individual's ability to perform a job that includes a set of defined behaviors.

Competencies and behaviors provide structure guidelines that enable identification, evaluation, and development of behaviors for individual employees.

> Example
>
> Examples of competencies:
>
> - Demonstrates self-insight and awareness
> - Planning and organizing
> - Optimizes group performance given multiple competing demands

> Note
>
> Competencies can also have associated Writing Assistant and Coaching Advisor content. You create this content from *Admin Center* > *Manage Writing Assistant and Coaching Advisor*.

You can define a set of behaviors that help to measure a competency. Behaviors help to assess if an individual possesses particular qualities that are required by employers and are used as benchmarks.

> Example
>
> Examples of behaviors:
>
> - Thoroughly examines work for errors and omissions.
> - Ensures that project deliverables and services meet all requirements and expectations. Creates channels to receive positive and negative feedback about work quality.

Parent topic: Creating Job Profile Content [page 104]

Related Information

Job Profile Builder Content Types [page 105]
Adding Job Profile Content from UI [page 107]
Job Profile Builder Content Object Associations [page 109]
Job Profile Objects Dependencies [page 109]
Introduction to Skills [page 111]
Creating Content Using Import and Export Process [page 120]

7.11.6.1 Adding Competencies from the UI

You can add *Competencies* by importing data in bulk or indivudually from the UI.

Context

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

You can modify, activate, and deactivate existing competencies available from different libraries by using the gear icon. You create competencies from scratch by following these steps:

Procedure

1. To set up your competencies, follow these steps:
   a. Go to *Admin Center* > *Manage Job Profile Content* > *Competency*.
   b. Select *Create Competency* that opens up the *Create New Content (Competency)* form.
2. Go to *Competency Name* box to enter in the name of your competency. Use the pencil picker icon if you want to include label in different languages.
3. Go to *Library* box to enter in the library name you want your competency saved.
4. Go to *Category* box to enter in your category you want your competency saved.
5. Go to *Description* to enter the description of your competency.
6. To include your competency under core, select *Yes* under core. Otherwise, select *No*

Once you've associated your competency with a job profile, it continues to appear even when you put your competency in *Inactivate* status.

7.11.6.2 Job Profile Builder Competency Types

Create Competency Types to serve as categories for your competencies by using the *Manage Data* tool or using MDF *Import and Export Data*.

Different Tools for Creating Competency Types

You can create Competency Types in one of two ways:

- Using *Manage Data* tool.
- Using MDF *Import and Export Data* tool.

When you've created your Competency Types, you add them to competencies from Manage Job Profile Content tool.

7.11.6.2.1 Creating Competency Types Using *Manage Data* Tool

You can create Competency Types using the *Manage Data* tool and later, be able to add them to your competencies independent of competency library or category

Prerequisites

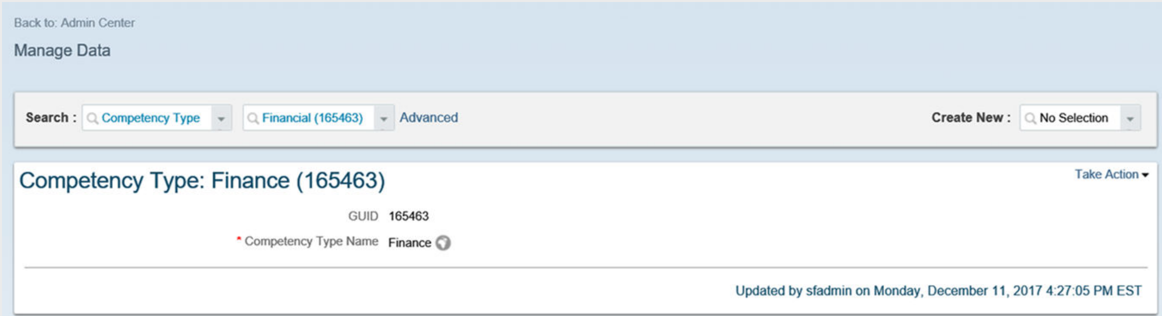
- Metadata Permissions role-based permissions enabled.

Procedure

1. Go to *Admin Center* > *Manage Data*.

   When you select *Manage Data*, you are directed to the *Manage Data* tool.
2. Go to *Create New* and select *Competency Type* from the menu so you can create your Competency Type.

   When you have selected Competency Type that opens the Competency Type page where you can add your competency type.
3. Go to the *Competency Type Name* field to enter the name of your Competency Type.
4. Select **Save** to finish.

> ⓘ Note
>
> When you have saved your competency type, GUID number is generated.
>
> 
>
>
> Screenshot of a Saved Competency Type in Manage Data Tool

7.11.6.2.2 Mapping Competency Types Using Manage Job Profile Content with Competencies

You can add your competency types when creating or editing your competency using Manage Job Profile Content *UI*.

Prerequisites

Existing Competency Types.

Procedure

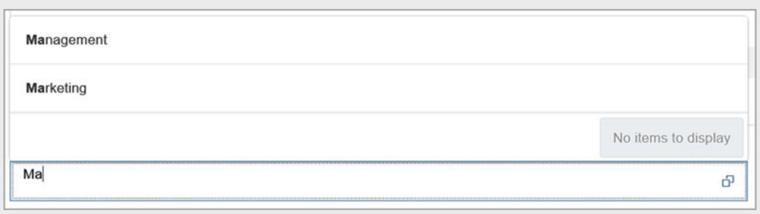
1. Go to *Admin Center* > *Manage Job Profile Content*.

   Once you've selected the Manage Job Profile Content link, you're directed to the Manage Job Profile Content page.
2. Go to *Select Content Type* > *Competency*.
3. There are two scenarios when you can map Competency Types with competencies.

Scenarios	Steps
Create New Competency	Instructions on how to map Competency Types when creating a new competency:

Scenarios	Steps
	1. From the Manage Job Profile Content, select *Create Competency* that opens up the *Create New Content (Competency)* page. 2. Enter in the required information for your competency that includes Competency Name, Library, Category, and Description. Assign any behaviors applicable for that competency
Edit Competency	Instructions on how to map Competency Types to an existing competency: 1. From the Manage Job Profile Content, locate the competency you want. Select the radio icon gear of the competency you want to edit. The available choices are: 2. • *Edit* • *Delete* 3. Select **`Edit`** that opens up the *Edit: Competency* page for your competency you want to map.

4. Locate the *Competency Types* text field and enter the competency types you want to map.

> → Tip
>
> The type-ahead allows you to search for competency types by entering the first two letters of its name.
>
> 
>
>
> Screenshot of Type Ahead Search Text Field for Competency Types

Screenshot of Competency Types

5. To finish, you have either of these two choices:

Scenarios	Steps
Create New Competency	When you're creating a new competency, to finish: 1. Select *Create Competency*.
Edit Competency	When you're mapping Competency Types with an existing competency, to finish: 1. Select *Save Competency*

> ⓘ Note
>
> When you've saved or created a competency, you're directed back to the Manage Job Profile Content page that contains competency list.

7.11.6.2.2.1 Competency Type List

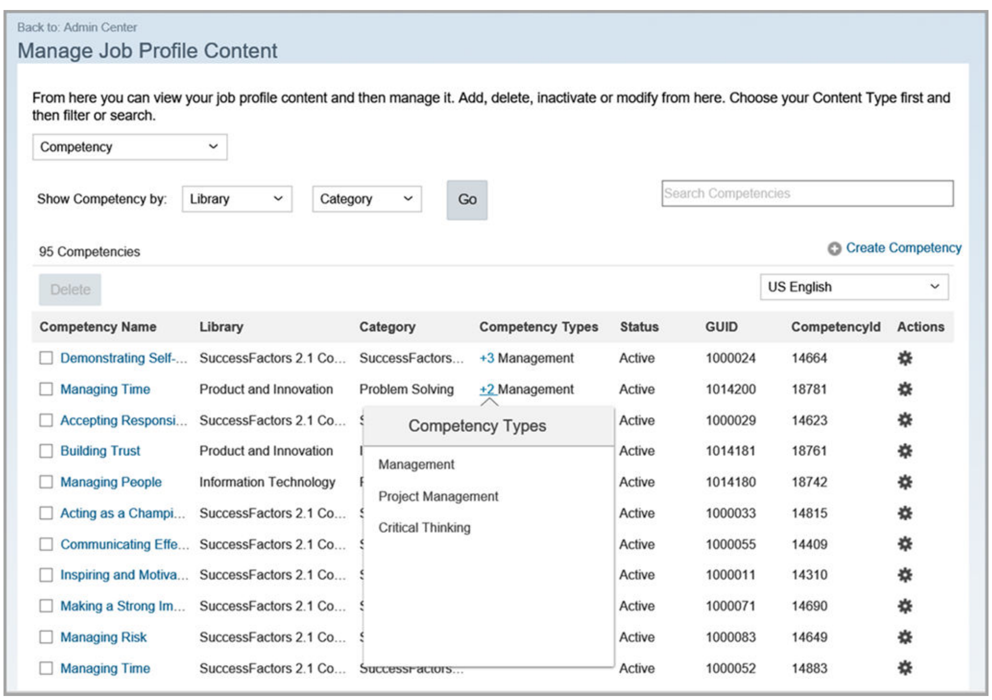
You can now view list of Competency Types associated with specific competencies when you view from the *Competency Listing* page when you use the Manage Job Profile Content.

Competency Types Column

To view Competency Types column, go to *Admin Center* > *Manage Job Profile Content* > *Select Content Type* > *Competency* that opens up the *Competency Listing* page.

The Competency Types column contain name of one competency type. When there are multiple competency types, a hyperlinked + symbol appears with the number of competency types that have been added for that competency.

You can select the hyperlink that contains the + symbol for the competency to view the associated Competency Types list that appear in a dialog box.



Competency Type List for Specific Competency Within Competency Column

7.11.7 Creating Content Using Import and Export Process

You can perform mass creation of job profile content by importing your data using a .csv file. Your .csv file is downloaded as a template by job profile content type using the export process. You can populate your .csv template with data before starting the import process.

Mass Creation of Job Profile Content

You can use *Manage Job Profile Content Import/Export* to create job profile content.

For a successful import, you want to be able to do the following:

- Export your current job profile content type data
- Download the template for your job profile content type
- Perform the import process
- Verify your data export or import

About Exports

Before you can use import process to create or map profile content, it is good to familiarize yourself with export process first.

There are two types of exports:

- Template only
- Template with existing Data

> → Remember
>
> When you use the correct template for the job profile content type you want to create or map may eliminate potential error messages when you perform the import process.

Creating New Content Versus Mapping Job Profile Content Using Import Process

When you create a family, role, or competency, a unique GUID is generated. Important things to note about differences between creating new content versus mapping job profile content using import process:

- **For new content**, all, or *GUID ExternalCode* should be empty in your .csv file that you plan to use.

  > ⓘ Note
  >
  > GUIDs for competencies are **NUMERIC** only. We recommend that you leave this field blank so that the system generates the GUID. When you leave that field blank as a best practice, helps eliminate potential syncing issues with *Job Description Manager* (JDM).

- **For Mapping job profile content**, the, or *GUID External Codes* should be present in your `.csv` file you import. See the table for list of job profile content that requires associated *GUID* or *External Codes*.

> ⓘ Note
>
> You can retrieve the *GUID* or *External Codes* information from these sources:
> - View the GUID of your job profile content type from the *GUID* column in the Manage Job Profile Content page.
> - Use the *Fill the download template with existing data* or *Export Data* option to download data for your job profile content data type.

Parent topic: Creating Job Profile Content [page 104]

Related Information

Job Profile Builder Content Types [page 105]
Adding Job Profile Content from UI [page 107]
Job Profile Builder Content Object Associations [page 109]
Job Profile Objects Dependencies [page 109]
Introduction to Skills [page 111]
Competencies and Behaviors [page 114]
Troubleshooting Tips Using Manage Job Profile Content Import/Export [page 135]

7.11.7.1 Exporting Your Job Profile as a Template Using *Manage Job Profile Content Import/Export*

You can use the *Manage Job Profile Content Import/Export* to download the .csv file as a template only.

Prerequisites

- Role-based permissions for Job Profile Builder

Procedure

1. Go to *Admin Center* > *Manage Job Profile Content Import/Export* that opens up the *Manage Job Profile Content Import/Export* page.
2. Go to *Download Data Import File Template* to select the job profile content type you want to download as a template.

The *Confirmation* dialog prompt that reads: **Fill the download template with existing data?** appears.

3. From the *Confirmation* dialog prompt, select **No**.
4. Save the .csv file when prompted to your hard drive as a template only.

> **Note**
>
> Your .csv template file contains the name of the following by default:
>
> - Job profile content type
> - Your company instance
>
> > **Example**
> >
> > Family_SFPART015579.csv
>
> You can change the name by selecting the **Save As** when you download the .csv file.

7.11.7.2 Exporting Your Job Profile Data Using *Manage Job Profile Content Import/Export*

You can use *Manage Job Profile Content Import/Export* tool to export existing job profile data content.

Context

As a best practice, you want to export your existing job profile content data before importing new data for these reasons:

- You want to ensure that there are no duplicate names for job profile content. Duplicate names, or GUIDs may cause error messages when importing data.
- If you plan to map job profile using import process for content that contain GUIDs that is required for parent and corresponding child job profile objects.

Procedure

1. Go to *Admin Center* > *Manage Job Profile Content Import/Export* that opens up the *Manage Job Profile Content Import/Export* page.
2. Go to *Download Data Import File Template* dropdown menu to select your job profile content you want.

   When you have selected your job profile content type, a **Confirmation** dialog box appears with a prompt to download your template with existing data.
3. To download your job profile content with existing data, select **Yes** when you see the **Confirmation** dialog box.

   A message prompt appears that states that you can retrieve your exported data by going to *Scheduled Job Manager* tool.

4. To finish, go to *Admin Center* > *Scheduled Job Manager* tool to retrieve your data.

7.11.7.2.1 Verifying and Retrieving Your Job Profile Data Using Scheduled Job Manager Tool

You can verify and retrieve .csv files that contains your existing job profile data by using the *Scheduled Job Manager* tool, that is available from Admin Center.

Procedure

1. To access your job profile content data, go to *Admin Center* > *Scheduled Job Manager*.
2. Locate your job using the *Job Name* or the *Job Type* column.
3. To download your exported data .csv file, from the *Scheduled Job Manager* page, select the *Download Status* link under the *Download Status* column.
4. When prompted, save the .csv file to your hard drive.

7.11.7.3 Importing New Job Profile Content Using the Manage Job Profile Content Import/Export Option

You can create mass job profile content using *Manage Job Profile Content Import/Export* for most job profile content types.

Prerequisites

- The job profile content export `.csv` template file for your job profile content type.
- For creation of new job profile content, or `<externalCode>` GUID column in your `.csv` file used for your import should be empty.
- To minimize the errors during the file import process, consider reviewing the spreadsheet configurations on your system. Use a text editor for making any edits to the file. This will avoid any unintended changes due to spreadsheet formatting.

Procedure

1. Go to *Manage Job Profile Content Import/Export* > *Type* to select content type you want to import.
2. Select *Choose File* to browse for your saved .csv template file.

3. Go to *File Encoding* field to select the correct encoding type.

> → Tip
>
> The default file encoding type is *Western European (Windows/ISO)*

4. Accept default for all other fields.
   - To validate without importing your records, select **`Validate`**
   - To execute your import, select **`Import`**.
5. To verify that your validation or import executed correctly, go to *Admin Center* > *Scheduled Job Manager* tool.
6. From the *Scheduled Job Manager* page, locate your job and select the *Download Status* to download your .csv file that has results of your validation or import.

> → Tip
>
> When you locate your job from *Scheduled Job Manager* page, the job name contains job profile content type, whether it's an import or export, and the date it ran.

> Example
>
> FamilyEntity-skills_MDFImport_08/16/2016

> → Tip
>
> The validation or import .csv file should contain this information:
>
> - Company instance name
> - Total number of records
> - Number of failed records
> - Whether it is successful or contained errors
> - Error messages

7.11.7.4 More About Using Scheduled Job Manager Tool for Validating Exports and Imports

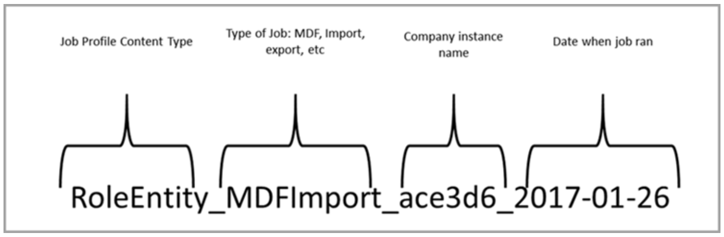
All exports with data and imports should be validated using the *Scheduled Job Manager* tool, even if all records are marked as processed.

Using Scheduled Job Manager Tool

To access, go to *Admin Center* > *Scheduled Job Manager* and locate your job under the *Job Name* column. The job name contains the following:

- Job profile content type.

- Type of job it is, such as export or import.
- The date it ran.



Breakdown of Job Name in Scheduled Job Manager Tool

Helpful Columns

There are two columns that are helpful when you view your export or imports in *Scheduled Job Manager* page:

Helpful Columns in Scheduled Job Manager Tool

Scheduled Job Manager Column	More Information
Job Status	Job Status column indicates that your export or import job has been successful, but not everything has been processed. Available statuses: • Completed • Failed
Job Details	Indicates that how many records were processed that includes the number of how many have been completed and failures. Here are a few examples: **Example** *Total:1/Processed:1, Passed:1/Failed:0* **Example** *Total:1/Processed:1, Passed:0/failed:1*

Download Link and Your .CSV File

You can download your .csv file by selecting the *Download Status* link. Your .csv file contains:

- Successful: Your .csv file may have a message that state it was successful with the number of successful records.
- Failure: You .csv file that contains data used for your import should have an error message at the end of row of where the error is. Typically, the error message states the column label that contains the incorrect data.

> ⚠ Caution
>
> It's possible to have errors in your .csv file even if the *Scheduled Job Manager* marked all records have been processed successfully.

7.12 Mapping Job Profile Content

7.12.1 Viewing Job Code Link in People Profile for Mapped Job Classifications

You can now map Job Classifications and view them as a job code in an employees *People Profile*.

Mapping Roles with Job Classifications

You can map your role with Job Classifications as long as these conditions exist:

- Job Classification you want to map has a corresponding job code
- The corresponding job code name is not within parenthesis

> ⚠ Caution
>
> When importing or creating Job Codes, entering the *Job Code* name within parenthesis that may cause the *Job Classification* not correspond with the *Job Code* correctly.

> Example
>
> Job Classifications names = Admin and Job Codes = (Admin-1)

Job Code Link in People Profile

The mapped *Job Classification* appears as a *Job Code* in *People Profile* for an employee that includes a link to the job profile.

7.12.2 Mapping Job Profile Content Using Job Profile Builder *Manage Job Profile Content Import/Export* Process

You can map existing job profile content using import and export process that is similar to creating content using a .csv file.

Mapping Job Profile Content

You can use the *Manage Job Profile Content Import/Export* to map associated job profile content with parent objects. You cannot create job profile content and map another existing job profile content type in one import. The job profile content that is considered as the **parent** has to be created first.

To learn more about job profile content associations, and dependencies, refer to these topics:

- Job Profile Builder Content Object Associations [page 109]
- Job Profile Objects Dependencies [page 109]

Manage Job Profile Content Import/Export

You can use the *Manage Job Profile Content Import/Export* to map specific job profile content as long as the job profile content type already exist and their GUIDs are in the .csv file.

From the *Manage Job Profile Content Import/Export*, when the *Download Data Import File Template* is selected, you can download your template file without data as a .csv file. When you are ready to map using the import process your .csv file should contain GUIDs for job profile content that you want to map.

> **Note**
>
> There are job profile mappings that require more than 2 GUIDs present in your .CSV file. This information can be found in the Job Profile Objects Dependencies [page 109] topic.

7.13 Mapping Roles

7.13.1 More About Mapping Job Codes

This topic gives an overview about mapping job codes for position based roles.

Job Code Role Types

If the job code you mapped have positions associated, your new role becomes position based. When saving your role, you can see if any positions are associated with it from the *Mapped Job Codes* tab in the *Edit: Role* page.

The JPB **Position** refers to the `Position Extension` Object. `Position Extension` is an object created by the system when a job code attached to a position (`Position` MDF object) is mapped to a role. `Position Extension` object is used to store the Skills and Competencies mapped to the position.

> Note
>
> Job code of type JOBCODE is from the User Data File JOBCODE field. Job code of type JOBCLASSIFICATION is from the MDF Job Classification object. When mapping job codes, those codes that you see appended with "- FO" are of type JOBCLASSIFICATION. It's recommended to use JOBCLASSIFICATION if you have Employee Central implemented and JOBCODE if you don't have an Employee Central implementation in your instance.

Viewing Positions

You can view positions associated with job codes for your role one of two ways:

- Go to the *# Positions* column and select the hyperlink.
- Use the gear icon to view positions associated with that job code.

> Caution
>
> Whether you use the hyperlink or the gear icon to view positions with mapped job codes, the *Save Role* prompt appears.

To save your role, select *Yes* that launches a prompt that states your role is saved. When you select *OK*, you are directed to the *Map Position to the job Code* page. The positions are listed under the *Position* column. You can edit any position by selecting the *Position* hyperlink or by going to the gear icon.

7.14 Assigning Behaviors

7.14.1 Assigning Behaviors to Competencies

This topic gives an overview on how to assign *Behaviors* to *Competencies*. You can map or assign behaviors from the *Edit: Competency* page for an already existing competency or when you create a new one.

Procedure

1. When you create a new competency, follow these steps to map your assigned behavior
   a. Go to *Admin Center* > *Manage Job Profile Content* > *Competency* that directs you to the competency page.
   b. Select the *+ Create Competency* link that directs you to the *Create New Content (Competency)* page.
   c. Enter in the required information.
   d. Select the *Assign Behaviors* button to create your behavior to associate with your competency.
   e. Enter in the required information for your behavior.
   f. Select the *Save* button to save your new behavior that directs you back to the *Create New Content (Competency)* page. Add more behaviors if desired.
   g. Select *Create Competency* to finish.
2. For Existing competencies, follow these steps to map your assigned behavior:
   a. Go to *Admin Center* > *Manage Job Profile Content* > *Competency* that directs you to the competency page.
   b. Select the competency you wish to edit that directs you to the *Edit: Competency* page.
   c. Select the *+ Assign Behaviors* link that opens up the *Assign Behaviors* box.
   d. Enter in the name of your behavior.

      > **Note**
      > You can use the pencil picker icon for translation options for your behavior name.

   e. Enter in the description of your assigned behavior.
   f. Select *Save* to finish.

Related Information

Assigning Behaviors for Role-Based Competencies [page 130]
Weights and Ratings for Behaviors [page 131]

7.14.2 Assigning Behaviors for Role-Based Competencies

This topic gives a detailed overview on how to map your competencies and behaviors to a role.

Procedure

1. Go to *Admin Center* > *Manage Job Profile Content* > *Set Up Families and Roles*.
2. Select *+ Create Role* link that directs you to the *Create New Content (Role)* page.
3. Enter in the required information for your role.
4. If no competencies are mapped to your role, follow these steps:
   a. Go to *Mapped Competencies* tab to select the *Mapped Competencies* button that opens up the list of *LIBRARIES*.
   b. Select the library you want to use and a list of categories appear next to your selected library.
   c. Select the category you want to use and a list of available competencies appear next to your selected category. Associated behaviors appear under their associated competencies when you select the arrow to expand. See below screenshot for more information.
   d. Select all competencies behavior you want to map.
   e. Select *Map* and *I'm done* button to finish.
   You're directed back to the *Create New Content (Role)* page. Your new competencies appear under the *Mapped Competencies* tab. Note that there's a column for *Behaviors*.

   > Note
   >
   > You can view all of the behaviors associated with a specific competency when you select the *Behavior Listing* icon as shown here ☰ under the *Behavior* column.

Related Information

Assigning Behaviors to Competencies [page 129]
Weights and Ratings for Behaviors [page 131]

7.14.3 Weights and Ratings for Behaviors

This topic gives a brief overview about setting up weights and ratings for specific behaviors.

Behavior Listing Icon

You can configure your behavior weight and ratings after you've saved your new role, which is done from the *Mapped Competencies* tab from *Edit: Role* page of your new role.

The *Behaviors* popup launches when the *Behavior Listing* icon is selected for your mapped competency. This is where you can configure the weights and ratings for all associated behaviors for that competency.

Once you've completed your weight and rating configuration, it appears in the performance review form for an employee.

7.15 Job Profile Acknowledgment

Heavily regulated industries such as healthcare and biotechnology have requirements to provide auditors and government organizations with proof that their employees understand their job descriptions. The regulations require that these organizations have acknowledged receipt of this information.

Configuring Job Profile Acknowledgment Settings [page 131]
This topic gives you instructions on how to configure your Job Profile Acknowledgment Settings.

Viewing the Job Profile Acknowledgment Report [page 132]
View information about the job profile acknowledgments that were sent.

7.15.1 Configuring Job Profile Acknowledgment Settings

This topic gives you instructions on how to configure your Job Profile Acknowledgment Settings.

Prerequisites

Role-based permission enabled for *Configure Job Profile Acknowledgment Settings*.

> → Tip
>
> Find these permissions under *Manage Job Profile Builder*.

Procedure

1. Go to *Admin Center* > *Configure Job Profile Acknowledgment Settings*.
2. Select the conditions to trigger acknowledgment notification by selecting one or all of the following checkboxes:
   - *Job profile change*
   - *Job code change*
   - *Role and job profile mapping change*
3. Select the *Homepage > To Do list* for the users to receive notifications as To-Dos.

   Enable so the users receive notification of the job profile change on the homepage. They can then acknowledge the changes.
4. Go to *Acknowledgment statement* text box to create the appropriate acknowledgment statement.
5. Select *Save* to finish.

Next Steps

Now that you have set up your Job Profile Acknowledgment Settings, you can configure your Job Profile Acknowledgment Report.

Task overview: Job Profile Acknowledgment [page 131]

Related Information

Viewing the Job Profile Acknowledgment Report [page 132]

7.15.2 Viewing the Job Profile Acknowledgment Report

View information about the job profile acknowledgments that were sent.

Prerequisites

Role-based permission enabled for *Configure Job Profile Acknowledgment Settings* .

> → Tip
>
> Find these permissions under *Manage Job Profile Builder*.

Procedure

- Find *Job Profile Acknowledgment Report* from Action Search or Tool Search in Admin Center.

  You're taken to a filterable and sortable report that shows the acknowledgments sent including various job details of a user as well as the status of the acknowledgment.

Task overview: Job Profile Acknowledgment [page 131]

Related Information

Configuring Job Profile Acknowledgment Settings [page 131]

7.16 Appendix And Troubleshooting Information

7.16.1 Using Job Description Manager and Job Profile Builder

7.16.1.1 Differences Between Job Description Manager and Job Profile Builder

Here is a table the describes differences between using Job Description Manager and Job Profile Builder. Some of these differences is related whether you are an Employee Central or if your company instances has been migrated over to **MDF**.

Differences Between Job Description Manager and Job Profile Builder

Job Description Manager 1.0	Job Profile Builder or JDM 2.0
Job Description	This is now referred to as a Job Profile when using **JPB**
Non-positioned based profile	Profiles can be position based.
No skillset respository	Uses Skill Profiles, instead of employees having individual skill-sets.
Legacy Succession Data Model	Uses role-based permission. ⚠ Restriction Role-based permissions is required

Job Description Manager 1.0	Job Profile Builder or JDM 2.0
Storage: uses tables for roles, families, competencies, and all job profile content types	Uses Metadata File Framework or **MDF** tables to store Job Profile Builder objects.
Cannot rate skills	Can rate skills

7.16.2 General Troubleshooting

7.16.2.1 Text Limitation Errors When Creating Job Profile Content

There is a text limitation when creating *Job Profile* content that is measured in **bytes**, rather than characters.

Byte Storage Limitation

When you add job profile content using the Manage Job Profiles tool, there is a maximum storage length of 4,000 bytes. For instance, if you enter in **abc** that is counted as three characters.

Job Profile sections html formatting, and this data is actually stored as: `<p>abc</p>`, which is more than three characters.

In addition to html formatting, here are use cases that can add additional characters to the byte limit of your content:

- Using bold, italics, underline, bullets
- Line breaks, coloring, and images
- Special characters
- Languages that do not use English alphabet such as Russian use double byte characters

When the byte limit has gone past the allowable limit, you may receive an error message that reads something similar to this one:

> Example
>
> *The text entered is XXXX bytes . This must be less than XXXX bytes long.*

Using Text Editor

You cannot verify the byte count within Job Profile Builder application, a text editor such as Notepad or Notepad++ is required to count character byte limitation.

7.16.3 Troubleshooting Imports

7.16.3.1 Troubleshooting Tips Using *Manage Job Profile Content Import/Export*

There are a few troubleshooting tips that can help you avoid error messages for your job profile content import such as character limitations and size limits.

Special Characters

You may receive error message that reference that entity name must immediately follow the **&** in the entity reference when you import data that contain special characters for these columns:

- *longdescription*
- *shortdescription*
- Header entity reference columns

To resolve this issue, you can use escape codes in your .csv import file. See table for character code replacement for special characters:

Character Code Replacement for Special Characters

Special Character	Character Code Replacement
&	*&amp:*
<	*<*
>	*>*

> ⓘ Note
>
> Insert the entity name immediately following the *&* in the entity reference field. Keep in mind when you insert additional characters may increase byte size of your document.

Exceeding Size Limits for Default Value Field

Unlike using Job Profile Builder user interface, when you create job descriptions using the import process, there's a 128 character limitation. The character limit applies to your job profile description data entered in the *descriptions/DefaultValue* column in your .csv import file.

Byte Limitations for Job Code Field

Job Code field has a maximum of 128 bytes, which may be fewer than 128 characters for certain character sets such as Cyrillic. When you exceed the 128-byte limit , your import may show *Completed* status in *Scheduled Job Manager* page but error messages similar to SYSTEM_ERROR_WHILE_SYNCING appear in your .csv import file.

Can I Purge Job Profile Data Using Import Process?

Job Profile Builder does not support full purge option, when you use &*Manage Job Profile Content Import/ Export* tool, *Incremental Load* is the only option available.

If you can see a **Full Purge** as an option under *Purge Type*, you are using MDF *Import and Export Data* tool.

> ⚠ Caution
>
> We do not recommend purging your job profile data because this option may corrupt data to entity mappings. When you use the full purge option, you may potentially remove Job Profile Builder Recruiting Management data.

8 Configuring General Display Name

General Display Name ensures the consistent display of employee name across SAP SuccessFactors HCM suite. To make sure that employees' names are shown in a format that suits your company's need, you can follow the below steps to define and configure the specific name format.

Prerequisites

You've read Important Notes About General Display Name Adoption [page 138] and understand where the general display name is applied or not.

Context

- The setting *Enable adoption of General Display Name* in *Admin Center* > *Company System and Logo Settings* is automatically on and cannot be disabled.
- A standard element, displayName, is used to store General Display Name. This element is always readable. Please note that it can't be seen or configured in the Succession Data Model, nor can it be modified in *Manage Business Configuration*.
- Initially, if you haven't defined and configured any name format for General Display Name, the field is prepopulated with full name. Full name is a combination of first name, middle name, and last name. Its name format is determined by the default locale. If an employee has no full name, the value *Unknown* is populated.
- For Employee Central customers, the data is updated by HRIS Sync. If Employee Central is NOT enabled in your instance, you can update General Display Name using Employee Import. We do NOT recommend Employee Central customers to update the field value through import, because the updates will be overwritten by HRIS sync or when you refresh the general display name. For more information about choosing a proper tool for updating user data, refer to the *Related Information*.

Procedure

1. Defining a Name Format [page 152].
2. Choose from the below two methods to configure the name format.
   - Configuring the Name Format for Legal Entities [page 153]
   - Configuring the Name Format for People Profile [page 153]
3. Decide whether to enable the *Admin Center* > *Company System and Logo Settings* > *Enable the name format selected in Configure People Profile to apply globally* option if you've configured a name format for People Profile.

- Enable the option if you expect to have a global name format for all legal entities.
- Don't enable the option if you need to configure different name formats for different legal entities.

> Note
>
> With the option unchecked, only the legal entities where no name format for general display is specified share the format selected for People Profile.

4. Refreshing General Display Name [page 154].

Results

You've defined and configured different name formats for general display name in different legal entities, or a single name format to be used across the company.

Related Information

Choosing a Tool for User Management
Field Requirements for the User Data File

8.1 Important Notes About General Display Name Adoption

Before you start using General Display Name, understand the following important notes and how they impact your SAP SuccessFactors system.

Modules That Support the General Display Name

Here's a table of modules and features that partially support General Display Name (with limitations) or fully support General Display Name but require your extra attention (with notes). For example, Career Development supports General Display Name, but legacy development goals don't. Please note that it's **NOT** a full list of modules and features that support General Display Name.

Module	Feature	Notes and Limitations
Employee Central	Hire	To uniquely identify a hire or rehire, we use legal name instead of General Display Name in the following UIs: • Add New Employee - Confirmation • Add New Employee - Match Pop-Up • Rehire Inactive Employee
Employee Central	Pending Hires	In the Manage Pending Hires tool, we show the name format configured by you for candidate name when configuring columns for the tool. When hiring using the tool, if the General Display Name isn't the same as the *Name* on the main screen, on the screens for Internal Hire, Global Assignment, Concurrent Employment, we display the General Display Name in after the *Name*. Other name columns such as HR Manager support the General Display Name.
Employee Central	Workflows	When a new employee is added triggering a new hire workflow, the new employee's name won't be displayed in the format of General Display Name on all UIs where that workflow is shown, including *My Workflow Requests*, *Workflow Details*, *Take Action*, cards on the home page, and email notifications.

<table>
<tr><th>Module</th><th>Feature</th><th>Notes and Limitations</th></tr>
<tr><td>Onboarding</td><td>Onboarding
Offboarding</td><td> Onboarding, Internal Hire, and Offboarding pages all support General Display Name. Full name token in email notifications supports General Display Name as well. Only in the following situations General Display Name isn't supported:

We use legal name instead of General Display Name in Compliance Forms
The format of names in documents generated by Print Form Services depends on the field mapping.
On the first rehire verification page:

Both General Display Name and legal name are shown for the new hire's hiring manager, where the legal name is in brackets.
Note
If the General Display Name and legal name are the same, only the General Display Name is shown.
Legal name is shown in the page title for the new hire.

On the second rehire verification page:

Both General Display Name and legal name are shown for the new hire in the page title and the new hiring manager, where the legal name is in brackets.
Note
If the General Display Name and legal name are the same, only the General Display Name is shown.
All names in the matching profiles are legal names.

</td></tr>
</table>

Module	Feature	Notes and Limitations
Platform	Employee Profile	All names in People Profile can be shown in the format of General Display Name, for example, names in the latest People Profile Preview and Legacy People Profile header. If you're using the latest People Profile, the `<Display Name>` field is by default shown on the Employee Information card. You can't change its visibility. If you're using the legacy People Profile, to have the field shown in a Live Profile User Information block, you can use the *Configure People Profile* admin tool to add the field to the block.

<table>
<tr><th>Module</th><th>Feature</th><th>Notes and Limitations</th></tr>
<tr><td>Platform</td><td>Home Page</td><td>Home page cards don’t always immediately reflect changes to a person’s general display name.
For cards that were generated before the 2H 2022 release, the name on the card doesn't change, even if General Display Name is enabled and a person changes their name. Cards always show the person’s name at the time the card was generated. You need to wait for older cards to expire.
For cards that are generated after the 2H 2022 release, the general display name is supported in most places. When General Display Name is enabled and a person changes their name, the name on the card is updated. However, it can take up to an hour for the change to appear.
In some places where names appear on home page cards, the General Display Name isn't supported yet. In these places, cards always show the person’s name at the time the card was generated, whether it was before or after the 2H 2022 release. You need to wait for these cards to expire. These places include:
Employee Central workflow cards
Job Offer and Job Requisition approval cards (for Recruiting)</td></tr>
<tr><td>Platform</td><td>Manage Documents</td><td>The Uploaded By and Document Owner fields will show the General Display Name.</td></tr>
</table>

Module	Feature	Notes and Limitations
Platform	Metadata Framework	All names in Metadata Framework can be displayed in the format of General Display Name, including: • Values for any user-type fields, including dropdown values, search results, and strikethrough values • Audit information including "last modified by" and "created by" in *Manage Data*, *Configure Object Definitions*, and *Picklist Center* pages. General Display Name will also appear in any application that uses an MDF object with a user-type field.
Platform	Search Users	The common find user widget displays first name, last name, and user name. General DIsplay Name will not be displayed. Go to *Admin Center* > *Reset User Passwords* to see an example of the find user widget.
Platform	Work Zone Content	All names in the HR content package, which includes cards and Guided Experiences, in SAP SuccessFactors Work Zone are displayed in the General Display Name format.
Recruiting	Candidate Relationship Management (CRM)	Applies to email campaigns, message center, and talent pools.
Recruiting	Interview Central	Includes email tokens for all operators names (recruiter name, hiring manager name, interviewer name, and so on).
Recruiting	Interview Scheduling	Includes My Calendar, Interview Setup portlet, Scheduling Overview page and email notifications.

Module	Feature	Notes and Limitations
Recruiting	Job Applications	Includes the applicant workbench; the job application details page with Jobs Applied, Application Status Audit Trail, Comment, and Correspondence portlets; Actions (Forward to Colleague, Forward to Requisition, and so on); Email tokens; Print Preview. The internal candidate name on the job application details page → Applicant Profile Header is displayed in **DisplayName (Internal Candidate) (ApplicantName)** format.
Recruiting	Offer Approvals Offer Letters	Includes the offer approval list, offer approval details, mass offer approvals, mass offer details, offer approver search, offer letter user search in CC and BCC email, the author name in the offer letter portlet, and tokens that display recruiter and hiring manager names in the offer letter to the candidate. Internal candidate names in the list of offer approvals being reassigned through the *Reassign Offer Approvals* page. External candidates continue to display their legal or formal name.
Recruiting	Job Postings	• The *Job Posting Report* and the *Job Status Report* in *Admin Center* > *My Reports* > *Manage My Reports* shows the individual's display name rather than the legal or formal name. • Posting profile and Groups • Users to Posting profile Association
Recruiting	Job Requisitions	In the *Job Requisition Change history* (Job Requisition field Audit), the records created for the change history before you enabled the Enable Adoption of general display name option will still display the legal name. Only the records created after enabling the Enable Adoption of general display name option will adopt the display name.

Module	Feature	Notes and Limitations
Recruiting	Job Requisitions Candidate Profile Candidate Relationship Management (CRM) Offer Approvals Offer Letters	This section lists the common areas in Recruiting that do not support display name, or the behavior is different for the display name changes: • Adhoc reports do not support the General Display Name. • The email templates created before enabling the *Enable adoption of General Display Name* option, the *CC* and *BCC* fields will not resolve the display name for the *By Employee name* option. So, you need to resave the email template to view the display name. • The external candidate name does not adopt the General Display Name. • In talent pools, you can search for people by their General Display Name when adding them to the Shared list, but the General Display Name isn't supported in the *Search for First Name in Shared List* and *Search for Last Name in Shared List* fields when looking for those who are already on the Shared list. • The Search field in the Message Center doesn't support General Display Name. • When creating new email campaigns, the *Search First Name* and *Search Last Name* fields in the *Manually Added Recipients* dialog for candidates don't support General Display Name.

Module	Feature	Notes and Limitations

Recruiting	Candidate Profile	Includes candidate profile record, candidate search results, application record pages, candidate summary page, Referral Tracking, Resume Viewer, and Email tokens.
		• The following portlets display General Display Name on Candidate Profile:
		  • *Correspondence*
		  • *Talent pool*
		  • *Email Campaign*
		  • *Employee Referral Information*
		  • *Comments*

Recruiting	Job Requisitions Candidate Profile	This following Admin Center pages display the General Display Name: • *Delete Candidate* • *Restore Deleted Job Requisitions* • *Reassign Job Requisitions* • *Mass Delete of Job Requisitions*
Employee Central	Position Management	With the adoption of the General Display Name, your employees' names are no longer sorted by **surname, name**. Your employees' names are sorted depending on the name format you've configured.

Module	Feature	Notes and Limitations
Performance Management	Performance Management	The following lists the notes and limitations of the General Display Name in Performance Management: • If users have recalled feedback for a form before you enable the General Display Name, *Recalled by <user's name>* in the *Comments* column of the form's *Audit Trail* table doesn't show users' display name. • If *Enable form title editability in the Form* or *Enable form title editability in Form info page* in *Form Template Settings* is selected, form titles don't show users' display name for forms launched before you enable the General Display Name. Users can edit form titles as they want. For forms launched after you enable the General Display Name, if users' display name is changed, form titles are not updated automatically. • For forms launched before you enable the General Display Name, the manager, HR manager, second manager, matrix manager, and custom manager fields in the employee information section don't show users' display name. When forms are saved, users' name is updated to display name. Forms in en route and completed folders are not updated. • For forms launched before you enable the General Display Name, form titles in the *Document List* section on the form history page, OData APIs, Data Subject Information Report, and all types of reports in People Analytics don't show users' display name. When forms are saved, users' name is updated to display name. • The *Employee* column in the *Audit Trail* table in *Story* reports remains showing users' full name. You can use the new join relations between

Module	Feature	Notes and Limitations
		the *Audit Trail* and *User* tables, *Step Owner* and *Proxy User of Step Owner*, to report users' display name.
360 Reviews	360 Reviews	360 Reviews admin tools haven't yet supported showing the General Display Name. The following lists the notes and limitations of the General Display Name in 360 Reviews: • If *Enable form title editability in the Form* or *Enable form title editability in Form info page* in *Form Template Settings* is selected, form titles don't show users' display name. Users can edit form titles as they want. • For forms launched before you enable the General Display Name, the form titles in Table reports or People Analytics reports don't show users' display name. When forms are saved, users' name is updated to display name.
Analytics	Report Center	All the pages in *Report Center* (including the sub-pages) that display <*First Name*> <*Last Name*> have been updated to display the General Display Name. **Note** Currently, the search functionality in *Report Center* doesn't support the adoption of General Display Name.
Analytics	Story Reports	The *Basic User Information* table in *User* schema has been updated with the *General Display Name* field that enables you to use the General Display Name of employees in all Story reports.

Module	Feature	Notes and Limitations
Analytics	Canvas Reports	The *General Display Name* field is available only in the following schemas of the *Detailed Reporting* data source for *Canvas* reports: • Job Information (Date Range) • Recurring Compensation Information (Date Range) • Job Information (Date Range) • Person and Employment Info (as of Date) • Person and Employment Audit • Person and Employment Export • Non-Recurring Compensation (Date Range) The *General Display Name* field is available only in the following realms of the *Advanced Reporting* data source for *Canvas* reports: • HR Manager Info • Matrix Manager Info • User Sys Info
Analytics	Table Reports	The *General Display Name* field is available only in the following domains of *Table* reports: • Job Information (Date Range) • Recurring Compensation Information (Date Range) • Job Information (Date Range) • Person and Employment Info (as of Date) • Person and Employment Audit • Person and Employment Export • Non-Recurring Compensation (Date Range)
Analytics	Workforce Analytics	The *General Display Name* field has been adopted only in: • HR Manager Info • Matrix Manager Info • User Sys Info

Module	Feature	Notes and Limitations
Analytics	Classic Reports	The following columns about Performance Management forms in *Overdue Document*, *Detailed Document Search*, and *Deactivated User Inboxes* reports under *Classic Reporting* support showing the General Display Name: • Title • Originator • Employee
Learning	Course Home	Applicable for learners.
Learning	Learning History	Applicable for learners.
Learning	Certificate of Completion	Applicable for learners.
Learning	Learning Plan	Applicable for learners.
Learning	My Team	Applicable for supervisors.
Learning	Action on Reportees	Applicable for supervisors.
Learning	Manage User Learning	Applicable for administrators.
Learning	Manage Learning Activities	Applicable for administrators.
Learning	Manage People	Applicable for administrators.
Learning	Curricula	Applicable for administrators.
Learning	Libraries	Applicable for administrators.
Learning	User	Applicable for administrators.
Learning	Manage Classes	Applicable for instructors.
Learning	Approval Process	Applicable for administrators.
Career Development	Development Objectives Career Explorer	Legacy development goals don't support General Display Name. If you enable Career Explorer, the first card on the Career Explorer page that contains user information don't show users' display name immediately until cache is finished. Cache is refreshed per two hours.
Employee Central	Business Configuration	The *Changed by* and *Updated by* columns show the General Display Name.

Module	Feature	Notes and Limitations
Time Tracking	Clock In Clock Out	The General Display Name is supported in the following pages: Note If the logged in user does not have the target population permission for the user who has created or last modified the time event, the rows for general display name will appear blank and show only the timestamp. • Manage Clock In Clock Out - *Employee Name*, *Created By*, and *Last Modified By* columns show the general display name. • Configure Clock In Clock Out - The *Created By* and *Last Modified By* columns for both Time Event Types and Clock In Clock Out Groups.
Goal Management	Goal Management	General Display Name isn't supported in legacy Goal Management.

Modules That Don't Support General Display Name

Here's a table of modules and features that don't support General Display Name. If a module isn't listed in the table, it supports General Display Name fully or partially.

Module
Onboarding 1.0
Employee Central Service Center

Related Information

General Display Name Implementation in Learning

8.2 Defining a Name Format

You can define a name format to be used for General Display Name in a legal entity or in People Profile. Depending on your business needs, you can define a single name format applied across the company, or define different name formats for different legal entities.

Prerequisites

When General Display Name is enabled, the *Visibility* field of the *Admin Center* > *Configure Object Definitions* > *Legal Entity* > *DisplayNameFormat* > *toDisplayNameFormat* attribute is set to *Editable*. Don’t modify this field value.

Context

With the General Display Name feature, it’s now possible to define different name formats to better reflect how names are used across the global regions. Please be aware that some screens show names of employees from different regions, and therefore with different name formats. To help end users better differentiate what part of the display name is the first name and what part is the last name, we recommend that you use separators or capitalization. Here are some examples:

- If you configure a name format with Last Name followed by First Name, then separate them with a comma. The result could be the following:
  - Alex Thompson
  - Grant, Carla

  With that, users can see that either the first part "Alex" is the first name or the part after the comma "Carla". To configure separators, see details in Visualizing the Editable Separator for Name Formats.
- Always have the last name in capital letters. The result could be the following:
  - Alex THOMPSON
  - GRANT Carla

  With that, user can see that "Alex" and "Carla" are the two first names, even if displayed in different ways.

For name format of locales other than EN_US, please use the customization options to do what’s appropriate for your target locale.

Procedure

1. Go to *Admin Center* > *Manage Data* .
2. Input **`Name Format`** in the *Create New* field.
3. Enter the details of your chosen name format in the *Name Format Code*, *Name Format Description*, *Name Element* and *Alternative Name Element* fields.

→ Recommendation

When defining the name format for the General Display Name, we recommend that you select Preferred Name as the name element.

4. Save your changes.

8.3 Configuring the Name Format for Legal Entities

After defining a name format of the General Display Name, you can now configure the name format using the *Manage Data* admin tool for a legal entity.

Procedure

1. Go to *Admin Center* > *Manage Data*.
2. Search and choose a legal entity that you want to assign the name format you prepared.
3. In the *Name Format for General Display* dropdown, select the name format you've prepared.
4. Save your change.

Results

You've configured a name format of General Display Name for the legal entity.

8.4 Configuring the Name Format for People Profile

After defining a name format of the General Display Name, you can now configure the name format using the *Configure People Profile* admin tool for People Profile.

Context

If you enable the *Admin Center* > *Company System and Logo Settings* > *Enable the name format selected in Configure People Profile to apply globally* option, the system will use the name format configured for People Profile for all legal entities, though you've configured a specific name format for general display in certain legal entities.

Procedure

1. Go to *Admin Center* > *Configure People Profile* > *General Settings* > *Choose Name Format*.
2. Select the name format you've prepared.
3. Save your change.

Results

You've configured a name format of General Display Name for People Profile.

8.5 Refreshing General Display Name

Employee Central customers who have updated configurations of general display name, for example, by changing the legal entity or the name format, must refresh general display name to trigger changes to the general display name.

Prerequisites

- You have the *Administrator Permissions* > *Manage System Properties* > *Company System and Logo Settings* permission.
- You've configured a name format with Legal Entity or People Profile.

Context

This task is for Employee Central customers only. Customers who haven't enabled Employee Central don't need to refresh the general display name and won't see the *Refresh General Display Name* button.

Procedure

1. Go to *Admin Center* > *Company System and Logo Settings*.
2. Click the *Refresh General Display Name* button right under the *Enable adoption of General Display Name* option.

Results

You've successfully triggered the refresh of the general display name. An HRIS sync job is triggered. You can check the job status under *Admin Center* > *Scheduled Job Manager*.

9 Enabling Pronouns

Pronouns like "she/her/her" are more and more used as designations in emails and profiles. To enable pronouns, you need to configure a **`PersonPronouns`** picklist.

Prerequisites

- You have the *Administrator Permissions* > *Metadata Framework* > *Configure Object Definitions* permission.
- You have the *Administrator Permissions* > *Manage System Properties* > *Configure People Profile* permission.
- You have configured the `pronouns` standard element in Succession Data Model or *Manage Business Configuration*.

Procedure

1. Go to *Admin Center* > *Picklist Center*.
2. Click the + *add* icon to create a picklist for pronoun.
3. Enter the picklist data.

   The value for the *Code* field must be **`PersonPronouns`**.
4. Use the + *add* to create a new picklist value.

   The *Add New Value* window is displayed.
5. Enter picklist values.
6. Save your changes.

Next Steps

To display pronouns on the legacy People Profile and quickcards, you also need to enable the *Admin Center* > *Configure People Profile* > *General Settings* > *Allow employees to maintain their pronouns* option. If you are using the latest People Profile, pronouns are by default shown in Profile Preview, with no more configuration required.

Related Information

Legacy People Profile Header Settings

Profile Preview of the Latest People Profile

9.1 Important Notes About Pronouns

Before you start using pronouns, understand the following important notes and how they impact your SAP SuccessFactors system.

Modules That Support Pronouns

Here's a table of modules and features that partially support pronouns (with limitations) or fully support pronouns but require your extra attention (with notes). It's **not** a full list of modules and features that support pronouns.

Module	Feature	Notes and Limitations
Platform	Employee Profile	• Employees can select and display their pronouns in the legacy People Profile header and quickcard, and in the latest People Profile Preview. For more information, see Legacy People Profile Header Settings and Profile Preview of the Latest People Profile. **Note** Pronouns can't be shown in a Live Profile User Information block of the legacy People Profile, neither in the Employee Information card of the latest People Profile. • Employees with multiple employment only need to set up their pronouns once and they will be displayed for all employment in the People Profile. • If an employee has permission to view the pronouns of someone else's employment, they can view the pronouns for all the employment of the same person.
Recruiting	Job Requisition	Pronouns display support on Quick card

Module	Feature	Notes and Limitations
		Quick card will now display Pronouns for all Job Requisition pages where the operator fields displayed. The *Employee Details* quick card on the *Job Requisition Summary* page now displays the pronouns for Operator fields (including *Currently with*).
Recruiting	Candidate	Pronouns display support is not available for internal, external, and Agency candidate quick cards.

10 People Management

Increase gender equity in how people are managed.

Research shows that different demographic groups have different experiences in the workplace, and this is largely related to ways they are managed. Managers may have unintentional bias in how they evaluate work, give promotions, provide rewards, and interact with their staff.

What causes gender bias in how people are managed?

- Describing women's performance in communal terms ("helps", "assists", "facilitates") and describing men's performance in agentic terms ("drives", "executes").
- Giving women performance feedback that is vague, but giving men performance feedback that is specific and directly tied to business objectives.
- Managers rating employee performance with unintentional or intentional bias.
- Unsupporting supervisors disproportionately impacting the work-life balance of female employees.

Use SAP SuccessFactors technology to reduce gender bias in how people are managed:

- Utilize cascaded goals to create clear, business-relevant performance objectives.
- Incorporate competencies into the performance cycle.
- Use Coaching Advisor to guide performance feedback specific to employee objectives.
- Utilize 360 to capture other sources of employee performance data.
- Utilize 360 to ensure manager fairness.
- Use Continuous Performance Management to capture and track actual performance accomplishments.
- Train supportive, unbiased management.

10.1 Configuring Cascader Role

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

Context

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

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

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

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

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

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

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

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

Procedure

Enable the `<cascader-role>` Switch

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

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

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

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

Example

Table Action Permissions for the `cascader` Role

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

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

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

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

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

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

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

10.2 Goal Section

Goal sections are used to evaluate employees' performance goals or development goals during a performance review.

Performance goals are job-oriented and result-based statements of an employee's ongoing and project-specific responsibilities. Development goals focus on learning, which is essential to improving individual or organizational performance.

One goal section is linked to one goal plan or one development plan. A form can have several goal sections, for example, one section for core company goals and one section for departmental goals. All goal sections work in the same way.

> **Note**
>
> We recommend that in each performance review cycle, you create a new goal plan and link the new one to forms. If you use one goal plan continuously for many review cycles, please note that when users update the goal plan, goal details in completed forms are updated accordingly.

Learn about the fields and options that you can configure and select for the goal section in the following table.

Field or Option	Description
Section Name	The name of the section that is shown on the form
Section Description	The description of the section that is shown on the form
Section Type	The goal section supports the following goal types. One section is for one type. • *Goal Section*: Select a goal plan that you want to link to the form. **Note:** If a goal plan template is newly imported, make sure that the goal plan is effective before you link it to the form. See Step 6 in Importing a Goal Plan Template. • *Individual Development Plan Section*: Select a development plan that you want to link to the form. If you link a goal plan or a development plan to forms, make sure that users have the role-based permission for the relevant template in *Goals* > *Goal Plan Permissions*. **Note:** If you link multiple goal sections with the same goal plan without using `<obj-category>` to filter goals, the goals are displayed in only one section.
Show Add Existing Objective Button / Show Add Existing Development Objective Button	The button is used to add existing goals in the linked goal plan to the form. **Note:** • To see and use this button, users need to have the `create` permission for goals in the goal plan template. • The button is not needed if goals are synced to the form automatically.

Field or Option	Description
Unable to Rate	The label of a special rating on the rating scale, for example, Too New to Rate. Performance reviewers can select this rating when they think it's too early to give a regular rating for a goal of an employee. If you already configured this field in *General Settings*, you don't need to configure it again here.
Include the ability to rate	Users can rate on each goal. See the Rating Options topic.
Exclude Private Goals	Private goals are excluded from the form when the form is created. Also, you can't add a new private goal to the form. **Note** This option only works when you launch a form. If you change the public goals on the form to private goals after launching the form, the goals still appear on the form.
Include the ability to enter a weight	Users can edit the weight of each goal.
Include a comment for each item	Users can comment on each goal.
Include an Overall Comment	Users can give an overall comment on the goal section.
Display section in summary	The rating and weight of goals are shown in the summary section.
Display calculated section rating	The calculated goal rating is shown in the summary section.
Auto populate goal weights from weights in the goal plan	Weights from the goal plan synchronize to the form.
Allow users to add/remove Goals within the section	Users can add goals to the form and remove goals from the form. You can enable the add and remove actions for specified roles and steps by configuring action permissions. **Note** To allow users to add goals to forms, if you're using legacy Goal Management, make sure that users have the "create" permission in the goal plan template; if you're using the latest Goal Management, make sure that users have both the "create" permission in the goal plan template and the role-based permission for the goal plan template.

Field or Option	Description
Synchronize goals from a goal plan and a review form	Changes made to goal plans automatically synchronize to the goal section on the form. Also, changes to goals on the form automatically synchronize to the goal plan. **Note** If you use the latest Goal Management and you enabled the auto-sync feature in Performance Management, please be aware of the following: • Users can delete a goal on a Performance Management form only when they have the *User Permissions* > *Objectives* > *Objective Plan Permissions* role-based permission to the goal plan of that goal. The goal deleted from the form will also be deleted from the goal plan. • Users without the permission can't see the button to delete the goal on the form. For more information, see Auto-Sync and Auto-Populate.
Use Metric Lookup Table Rating	If the linked goal plan has a metric lookup table, this option is selected by default. For more information, see Goal Ratings from Metric Lookup Tables.
Include in overall Goal rating calculation	Ratings in this section are included in the calculation of the overall goal rating. The option is useful if you have multiple goal sections and want to leave one section out of the calculation.
Display in Goal section	Goals in this section are listed in the goal competency summary section.
Lock item weights	Goal weights are locked so that users can't change the weights.
Include in overall performance summary section rating	Ratings in this section are included in the calculation of the performance rating in the performance potential summary section.
Minimum Goals Required	The minimum number of goals required in this section
Maximum Goals Allowed	The maximum number of goals allowed in this section
Section Weight for Obj/Comp Summary	The weight of the section for calculating the overall goal rating in the goal competency summary section
Total Weight	Target total weight for the goals in this section
Rating Scale	The rating scale used in this section. If you've selected a rating scale in *General Settings*, you don't need to select it again here.
Default Rating	The label that is shown in the rating field if users haven't rated on goals
Choose an alternate label for the rating field	The label of the official rating field

Field or Option	Description
Goal Plan State	If you've configured this feature for the linked goal plan, the goal state can be changed to a specified state when the form moves to a specified step or when the form is completed or deleted.

> **Note**
>
> For development goal sections, you can configure only the following settings in *Manage Templates*:
>
> - Include the ability to rate
> - Exclude Private Goals
> - Include the ability to enter a weight
> - Include a comment for each item
> - Include an Overall Comment
> - Allow users to add/remove Goals within the section

10.3 Competency Section

Competency sections are used to evaluate employees' competencies during a performance review. A Performance Management form can include three competency sections, respectively for job-specific competencies, core competencies, and custom competencies.

> **Note**
>
> - To optimize system performance, we recommend that no more than 60 competencies are rated on a form.
> - If the Competency object is set to secured in *Configure Object Definitions*, users must have the *User Permissions* > *Miscellaneous Permissions* > *Competency* role-based permission so that competencies and behaviors can work properly in Performance Management and 360 Reviews.

Learn about the fields and options that you can configure and select for the competency section in the following table.

Field or Option	Description
Section Name	The name of the section that is shown on the form
Section Description	The description of the section that is shown on the form

<table>
<thead>
<tr><th>Field or Option</th><th>Description</th></tr>
</thead>
<tbody>
<tr><td>Section Type</td><td>The competency section supports the following competency types. One section is for one type.
Job Specific: Role-specific competencies are populated on the form based on the employee's job role and job code.
Core: Core competencies of your company
Custom: Custom competencies that are defined in the instance. After selecting this option, choose Show advanced options > [X] Custom Competency defined. Click to modify to add custom competencies.</td></tr>
<tr><td>Unable to Rate</td><td>The label of a special rating on the rating scale, for example, Too New to Rate. Performance reviewers can select this rating when they think it's too early to give a regular rating for a competency of an employee.

If you already configured this field in General Settings, you don't need to configure it again here.</td></tr>
<tr><td>Allow users to add competencies</td><td>Users can select competencies from your competency library and add them to the form, and also remove competencies from the section. They can add the same competency to the form only once.

⚠ Caution

If you configure the template to rate on behaviors, users can add the same competency with different behaviors to different sections. When the rating or comment of a competency in one section is updated, that in other sections is updated as well. To avoid confusion, users should add one competency to the form only once.

You can enable the add and remove actions for specified roles and steps by configuring action permissions.</td></tr>
</tbody>
</table>

Field or Option	Description
Show behaviors	The behaviors assigned to competencies are shown on the form. You can select the following options for *Display Mode*: • *Display Behaviors below Competency Rating*: Behaviors are shown below the competency rating. • *Display Behaviors above Competency Rating*: Behaviors are shown above the competency rating. You can also select *Filter By Job Code* to show only the role-specific behaviors on the form. When a competency is assigned with the behaviors of multiple job roles, only the behaviors of the employee's job role are shown. To allow users to rate behaviors instead of competencies, select *Rating on behavior*. → Recommendation We recommend that you use XML template to configure ratings and comments on behaviors. For more information, see Rating Behaviors in Related Information.
Include the ability to rate	Users can rate on each competency. See the Rating Options topic in Related Information.
Include a comment for each item	Users can comment on each competency.
Include an overall comment	Users can give an overall comment on the competency section.
Include in overall competency rating calculation	Ratings in this section are included in the calculation of the overall competency rating. The option is useful if you have multiple competency sections and want to leave one section out of the calculation.
Display in competency section	Competencies in this section are listed in the goal competency summary section.

Field or Option	Description
Show expected competency rating	The expected rating of competencies for the job role is shown along with the actual rating. The option is useful to view the gap between an employee's expected and actual performance. ⓘ Note • If users add a competency to the form by role and the competency has an expected rating, the expected rating is displayed on the form along with the added competency. If the competency is assigned to multiple roles with different expected ratings, only the expected rating of the selected role is displayed. • If you've upgraded to Talent Intelligence Hub, this configuration is **not** yet supported when users add competencies to the form through the picker. Users won't see expected ratings next to the competencies added to the form.
Include in overall performance summary section rating	Ratings in this section are included in the calculation of the performance rating in the performance potential summary section.
Total Weight	Target total weight for the competencies in this section
Include the ability to enter in a weight	Users can edit the weight of each competency.
Display section in summary	The rating and weight of competencies are shown in the summary section.
Show calculated section rating	The calculated competency rating is shown in the summary section.
Rating Scale	The rating scale used in this section. If you've selected a rating scale in *General Settings*, you don't need to select it again here.
Hide numeric rating values (only show text labels)	Select the checkbox to show on the form only the rating labels defined in *Rating Scales*. When the rating scale has no more than five rating levels, if you select this option, the rating field on the form becomes a dropdown list showing rating labels only. When the rating scale has more than five rating levels, the default rating field is a dropdown list showing both rating values and labels. If you select this option, the dropdown list shows rating labels only.
Default Rating	The label that is shown in the rating field if users haven't rated on competencies
Choose an alternate label for the rating field	The label of the official rating field

10.4 Goal Plan Template Fields

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

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

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

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

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

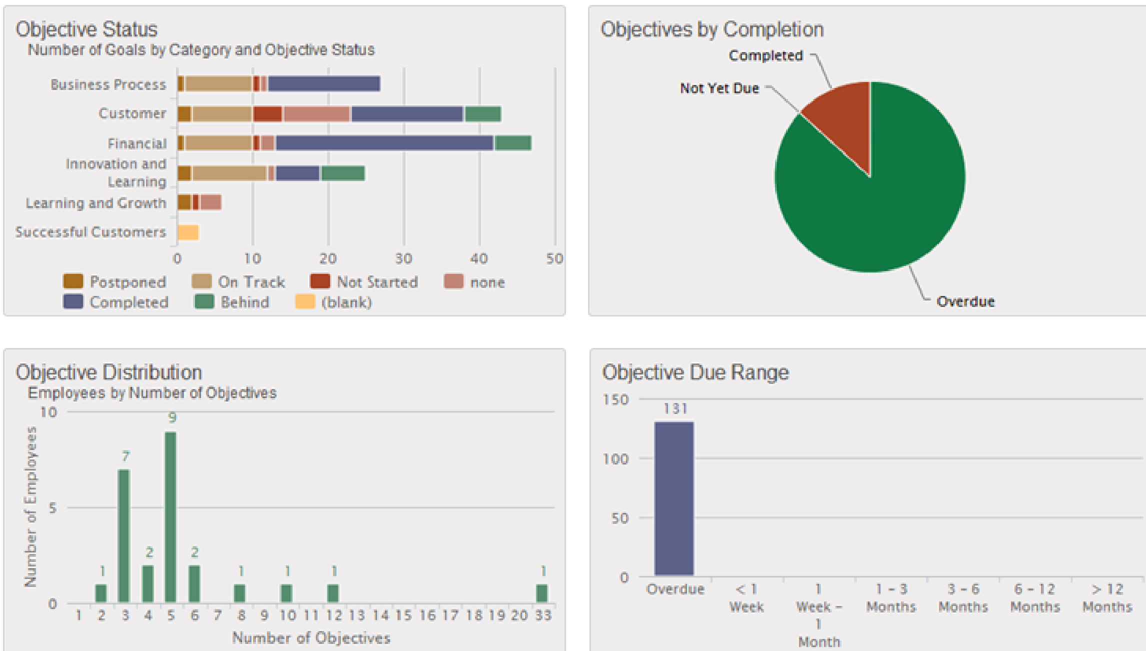
Important Notes for Defining the `<field-definition>` Element

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

  > → Remember
  >
  > When you delete a field from the goal plan template, using either the *Admin Center* > *Manage Templates* tool or the XML file, do remember to delete the corresponding permissions of that field

from the <field-permission> section of the goal plan template. If you delete a field without deleting its permissions from the goal plan template, you might encounter errors while using the goal plan.

- When you decide which fields are included in a goal plan, be aware of the following:
    - It's important to determine what portlets under *Summary* on the *Goal Plan* page are used for reporting on goals. The *Objective Status* portlet uses the `Status` field. The *Objectives by Completion* and *Objective Due Range* portlets use the `% Complete` field and the `Due` field. They don't recognize completed goals because they don't use the `Status` field.



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

10.5 Adding a New Competency Library

You can create a new competency library on the *Manage Competencies* screen.

Context

To add a pre-built competency library from the SuccessStore:

Procedure

1. Go to *Admin Center* > *Manage Competencies*.
2. From the *Competency Library List*, click *Add New Library* > *Choose from SuccessStore*.
3. Choose a library that you would like to add, then click *Add to My Instance*.
4. When the competency library is loaded, click the library and then click any competency then begin editing the key details. They are:

Option	Description
Name or description of the competency and the category	The category is most-often used to help organize information within this tool.
Performance Details	Text that appears in the writing assistant and coaching adviser.

5. If you want to identify a competency as core to your organization, for example if your organization has core values or mission competencies, select *Yes* in the *Core* field to tag or identify this competency as core to the organization.

   In the *Manage Templates* tool, you can set the form to dynamically pull the core competencies for all your employees when you launch the form.

   > Note
   >
   > If the **Core** flag is set in *Manage Templates,* users must mark also competencies as core in the Manage Competencies tool, otherwise this section will be blank for your users.

6. Under *Performance Details* click the text to update the tone and voice that you want to change.
7. When you have finished updating the text, click *Save*.

10.6 Utilizing 360

10.6.1 Views in Detailed 360 Report

After a 360 reviews form is fully completed, you can review a detailed 360 report that contains four views. They're Graphical Summary, Gap Analysis, Hidden Strengths and Blind Spots, and Rank.

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

Graphical Summary

The *Graphical Summary* view is the default opening view of a detailed 360 report. It provides an overview of ratings broken down by individual raters and categories of raters along with comments given on the ratings.

> ⓘ Note
>
> A radar chart is used to display item ratings for competencies under the *Graphical Summary* tab. The chart only shows competency that has at least three rated items.

This view includes the following areas:

- The Overall section displays an average rating by each category of raters and all raters. With specific configurations, the section can also display weighted sum rating of all raters, or of all raters except the employee. Minimum and maximum ratings are not available.

  > ⓘ Note
  >
  > The overall ratings are rounded before being displayed on a detailed report, but they aren't rounded on an ad hoc report. So, for the same subject employee, the overall ratings can slightly differ.

- In the Competency and the Goal sections, average ratings of all raters and comments are displayed by sections and items.

Gap Analysis

The *Gap Analysis* view allows you to know if there's a significance difference in the ratings between the two categories of raters.

You can show the Gap Analysis view by going through the following steps:

1. Go to *Admin Center* > *360 Reviews* > *Form Template Settings*.
2. Select or clear *Enable Gap Analysis View from Detailed 360 Report*.

3. Click *Update Form Template*.

Details about the different colors shown in the Gap Analysis view:

There are five possible colors on the gap analysis chart, that is, on the first two columns where you select the two columns to compare. For the actual gap, it's only red or green depending on the direction of the gap. So, for the first two columns the change in color depends on the percentage of the rating in the scale. For example, a rating of 3.45 on a 1–5 scale equals 61.25%, and not directly mapped to ratings (so we can support different rating scales with the same five colors).

Here's the breakdown of what percentage the rating represents and what color is displayed:

- 25% and under = red
- More than 25% up to and including 41% = orange
- More than 41% up to and including 59% = yellow
- More than 59% up to and including 75% = light green
- Everything else (more than 75% and up) = green

> Note
>
> Only two colors are shown in the *Gap Analysis* view: one is green, which represents positive value; the other is red, which represents negative value.

Hidden Strength and Blind Spot

The Hidden Strengths and Blind Spots view allows you to see whether there's a significant difference between how employees rate themselves compared with how others rate them. The view includes two sections:

- The Hidden Strength section displays the competency or the goal on which employees rate themselves lower than others rate them by a defined amount.
- The Blind Spot section displays the competency or the goal on which employees rate themselves higher than others rate them by a defined amount.

You can show this view by configuring it in XML form template. Below is a sample configuration.

Sample Code

```
<hidden-strength-threshold>0.0</hidden-strength-threshold>
<blind-spot-threshold>0.0</blind-spot-threshold>
```

Rank

The Rank view allows you to see all competencies or behaviors across all sections.

You can show the Rank view on the report by going through the following steps:

1. Go to *Admin Center* > *360 Reviews* > *Form Template Settings*.

2. Select *Enable Rank View from Detailed 360 Report*.
3. Click *Update Form Template*.

10.6.1.1 Detailed Reports

This section discusses the five different 360 reports that are available.

10.6.1.2 Benchmark Ratings

A benchmark rating is an average rating of a competency of a job code. Companies can use the benchmark rating to compare an employee's rating against the average rating.

There's only one benchmark rating per competency per job code. When you apply benchmark ratings to forms, for completed forms, a benchmark rating bar appears in each competency's bar charts in the Graphical Summary and Rank View report.

The benchmark ratings shown in the report are taken from the last benchmark ID that was applied to the form. The benchmark ID is created when a benchmark calculation is completed. It represents the group of each competency's average rating in one benchmark calculation.

How Benchmark Ratings Are Calculated

A benchmark rating is calculated by averaging all ratings for a competency of a job code, including the self-rating. All individual ratings are equally weighted. You can't apply weights to make any individual raters or groups' ratings worth more.

> Note
>
> Only completed 360 forms are included for the calculation of benchmark ratings. If there are incomplete 360 forms that fall within the filter criteria, no participant ratings from those reviews are included in the calculation.
>
> The calculation of benchmark ratings is based on job code assignment. So, all individuals within the company who have the same job code (defined in User Directory and set for each employee) have their ratings averaged together. The only way to exclude specific people's ratings from this benchmark is to exclude them from the job code, or not create a form instance for them.

> Example
>
> John Doe has a 360 form created for him. Jane Smith also has a 360 form created for her. Both John and Jane have the same job code and are rated on the same five competencies, plus one specific to each of them. The ratings for these forms are as follows:

John Doe's 360 Reviews	Self-Rating	Manager Rating	Rater 1	Rater 2	Rater 3	Rater 4
Competency 1	4	3	4	2	2	1
Competency 2	5	5	4	2	3	3
Competency 3	3	3	3	3	3	3
Competency 4	3	2	4	2	2	1
Competency 5	4	2	3	1	1	1
Competency A	2	2	1	/	/	3

Jane Smith's 360 Reviews	Self-Rating	Manager Rating	Rater 1	Rater 2	Rater 3	Rater 4
Competency 1	4	3	4	2	2	1
Competency 2	5	5	4	2	3	3
Competency 3	3	3	3	3	3	3
Competency 4	3	2	4	2	2	1
Competency 5	4	2	3	1	1	1
Competency B	4	4	5	5	3	3

Competency	Benchmark Rating
Competency 1	2.667
Competency 2	3.667
Competency 3	3
Competency 4	2.333
Competency 5	2
Competency A	2
Competency B	4

> **Note**
>
> Competencies 1–5 are averaged over 12 distinct ratings, Competency A four distinct ratings, and Competency B six distinct ratings.

10.6.1.3 Applying Benchmark Ratings to Forms

Note the following:

- You can only apply benchmark ratings to the forms which were used to create the benchmark. You cannot apply benchmark ratings to forms that were not used in the calculation.
- When you apply benchmark ratings to forms, it will apply it to ALL of the forms used in the calculation. You cannot select a subset of the forms to apply to. It's all or nothing.

- Admins should be able to verify which forms were included in the benchmark and see which benchmark was applied to each form.
- Any given form can support only one benchmark at a time to determine the benchmark ratings for comparison, even if that form has been used in multiple benchmark calculations. The form will display the benchmark ratings from the last benchmark ID that was applied to the form.

To apply a benchmark to the forms that were used to create it, do the following:

1. From the Administration pages select Calculate 360 Benchmark Ratings.
2. Click apply *Benchmark Ratings to Forms* for the appropriate benchmark ID. This will apply the benchmark to all of the completed forms that were used in the benchmark calculation.

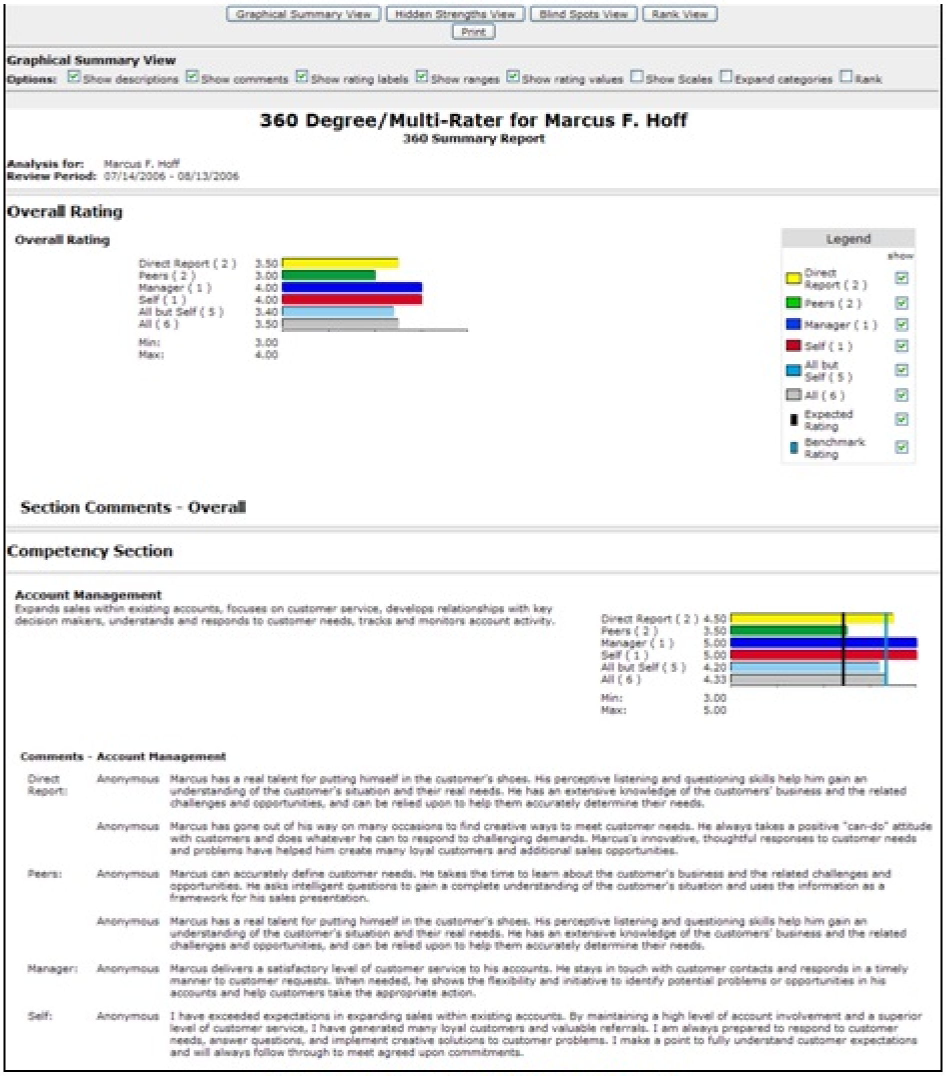
> ⓘ Note
>
> A user who wants to know which forms were included in the benchmark calculation, can download the list of forms that were used by clicking the *Download Benchmark Data*. The csv file contains two columns: the form id's of the forms used in the benchmark calculation, and the benchmark ID which was applied to each form. The benchmark ID column is useful to audit whether this form has or has not had the current benchmark applied to it. You can also delete an existing benchmark. If you delete a benchmark that is in use, those forms which are using the benchmark will no longer display any benchmark ratings in its Detailed 360 Report.

Displaying Benchmark Rating on a 360 Form

Note the following:

- The Detailed 360 Report will display the benchmark ratings in a similar fashion to the way expected ratings are displayed. The option will only be available if after benchmark ratings are applied to the form.
- Benchmark ratings are stored in a similar fashion to Expected Rating, in that there is only one Benchmark Rating per competency-job code.
- If a benchmark has been applied to a form, the benchmark rating will show up as a legend option and can be dynamically turned on and off on the report for comparison purposes.
- If turned on, a benchmark rating bar will show up in the bar charts for each competency and behavior as a blue bar above the colored rating bars.
- Benchmark Rating should use Text Replacement so customers can rename this as needed.
- The benchmark ratings shown are taken from the *last* benchmark ID that was applied to the form. If the benchmark ID that was used has been deleted, the option to show benchmark rating will not appear.

Once the benchmark has been applied to the forms, open the Detailed 360 Report for one of the forms. The benchmark option should appear in the Graphical Summary View and in the new Rank View (see next section). This option works in a similar fashion to the Expected Rating selection. To hide the value, simply uncheck the visibility for the benchmark ratings in the legend. You cannot remove the benchmark option from the report if an existing benchmark has been applied. The only way to change the benchmark ratings is to apply a new benchmark ID to the form, or delete the applied benchmark from Admin.



Benchmark Rating on 360 Detailed Report

10.6.2 Example: Making a 360 Anonymous for Some and Named for Others

You can configure a 360 to have varying levels of anonymity. For example, a manager sees the 360 as named and the employee sees the 360 as anonymous. It is also possible for the employee to see responses from their manager or peers as named, but can only see responses from their direct reports as anonymous.

As of now, it is not possible to grant someone with the ability to remove participants comments. Even if you can see who said what, you cannot remove the comments. Also, configuration of levels of anonymity must be done at the time the form is created. This means, before the 360 review process, you need to know who you want to grant access to see named participants. Once the form is created and the process is started, you cannot change that.

ⓘ Note

By selecting *Show Participants in Status Summary (Applicable to Anonymous 360's only)* in *Admin Center* > *Form Template Settings*, process owners can view basic information about the participants on the Rater List of an anonymous 360 Reviews form in the Evaluation, Signature, and Completed stages.

In Provisioning, access your 360 form template and ensure that *Participant names on 360* option is selected.

→ Remember

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

Add the following XML example in the meta section after

```
<meta-cat hidden-threshold="0" min-count="0" max-count="2147483647"
                ><![CDATA[Self]]></meta-cat>
```

Example

The following example hides all rater identities for all users in all stages, that is, every rater is shown as Anonymous and in effect it turns an Open 360 to an Anonymous 360:

```
<rater-id-permission type="none">
<rater-category>*</rater-category>
<role-name>*</role-name>
<route-step stepid="*"/>
</rater-id-permission>
```

OR

```
<rater-id-permission type="none">
<role-name>*</role-name>
<route-step stepid="*"/>
</rater-id-permission>
```

Example

To hide all rater identities for Employee in all stages, that is, to the Employee, all raters will be shown as Anonymous:

```
<rater-id-permission type="none">
<rater-category>*</rater-category>
<role-name>E</role-name>
<route-step stepid="*"/>
</rater-id-permission>
```

OR

```
<rater-id-permission type="none">
<role-name>E</role-name>
<route-step stepid="*"/>
</rater-id-permission>
```

Example

To hide all rater identities for all users in 360 Evaluation Stage:

```
<rater-id-permission type="none">
<rater-category>*</rater-category>
<role-name>*</role-name>
<route-step stepid="360EvaluationStage"/>
</rater-id-permission>
```

OR

```
<rater-id-permission type="none">
<role-name>*</role-name>
<route-step stepid="360EvaluationStage"/>
</rater-id-permission>
```

Example

To hide all rater identities for all users in 360 Evaluation Stage, except the Manager, that is, when the Manager opens the 360, all the names of the raters are visible, while everyone else sees as Anonymous:

```
<rater-id-permission type="none">
<rater-category>*</rater-category>
<role-name>*</role-name>
<route-step stepid="360EvaluationStage"/>
</rater-id-permission>
<rater-id-permission type="enabled">
<rater-category>*</rater-category>
<role-name>EM</role-name>
<route-step stepid="360EvaluationStage"/>
</rater-id-permission>
```

Specific Example

Add the following snippet in meta section of 360.

```
<meta-cat hidden-threshold="0" min-count="0" max-count="2147483647" ><!
[CDATA[Self]]></meta-cat>
<rater-id-permission type="none">
<rater-category>*</rater-category>
<role-name>*</role-name>
<route-step stepid="*"/>
</rater-id-permission>
<rater-id-permission type="enabled">
<rater-category>*</rater-category>
<role-name>EM</role-name>
<route-step stepid="360EvaluationStage"/>
<route-step stepid="CompletedStage"/>
</rater-id-permission>
<meta-360-rollup-category-name><![CDATA[Upward]]></meta-360-rollup-category-name>
```

As a result of this, when the 360 is in the evaluation and completion stage, the manager sees participant names in the evaluation summary.

When the 360 is in the evaluation or completion stage, the employee (other than the employee with a completed copy) cannot see participant names in the evaluation summary.

10.6.3 Configuring Instructions on the Detailed 360 Report

You can allow admins to create instructional text for the Detailed 360 Report.

Context

> Note
>
> - Instructions are only shown on the Graphical Summary View and do not appear on any other view.
> - Instructions are set at the Form Template. This means that admins need to determine how they want to use the report and compose their instructional text before the actual forms are created for their users. We recommend that Professional Services demonstrate this to admins.
> - If instructional text is used, then it will be displayed by default on the Detailed 360 Report. A display option will be available to hide the instructional text if desired by the user.
> - If instructional text is not used, then the instruction section will be invisible, and no option to show/hide will be available. This allows for backwards compatibility for existing customers who do not use this feature.
> - HTML rendering is not supported by the instructional field.

.

Procedure

1. While creating the 360 form template, enter the instructional text in the form xml editor in Provisioning. This text is stored in the `<instruction-sect>` tag in the form xml.

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

2. Use the template to create a test form and verify that the instructions appear correctly before you create live forms.

Results

The Instructions section shows up on the Detailed 360 Report.

10.6.4 Anonymous View for Named 360s

Anonymous View allows users to select if they want to display the Detailed 360 Report with names or without names.

The primary use of this feature is when the report is enabled for Managers, who then print the reports to give to employees and want to print an anonymous view.

> **Note**
>
> This feature is only applicable to named 360s. The 360 must be named, but you can hide the information from displaying.

To enable the anonymous view:

1. Create a Named 360.
2. Check the access permissions for the Detailed 360 Report. Go to *Admin* > *Form Templates* and select the correct 360 form template and check *Enable 360 Detailed Report Permission for*.
3. Check *Enable Anonymous 360 Detailed Report View*.
4. Open the Detailed 360 report from the Summary view after the 360 report is completed.
5. When viewing the report, you can select if you want the named view or the anonymous view.

10.7 Integrating with Continuous Performance Management

You can view the Continuous Performance Achievements, along with their feedback, directly on the *Goal Plan* page.

Prerequisites

- Continuous Performance Management must be enabled in your SAP SuccessFactors instance.
- You have the *Access Continuous Performance Data*, *Access Continuous Performance Page*, and *Access Continuous Feedback Data* permissions under *User* > *Continuous Performance Management User Permission* permission.

Context

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

Procedure

1. Go to *Admin Center* > *Manage Templates*.
2. Choose *Goal Plan* tab, and then open the goal plan template in which you want to include the Achievements.
3. Choose *General Settings*, and then select *Display Continuous PM Achievements on goal plan*.
   If you've enabled the latest Goal Management, this option is automatically on and invisible from UI.
4. Save your changes.

Results

- For legacy Goal Management: The *CPM Achievements* column is available on the *Goal Plan* page.

  > Note
  >
  > The number of Continuous Performance Achievements linked with each goal appears in the *CPM Achievements* column on the *Goal Plan* page. When you choose the count under the *CPM Achievements* column, a pop-up window lists out the details of the linked achievements, along with the feedback received on the achievements. Please note that you can search for the linked achievements only by their title, not by any other metadata.

- For the latest Goal Management: The *Linked Activities* section is available on the goal details page, along with a clickable link to feedback received for each activity.
  With the integration, users can link their activities to multiple goal plans, regardless of whether the goal plan templates have been converted.

10.8 Team Goals

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

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

Overview

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

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

Major highlights of Team Goals are:

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

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

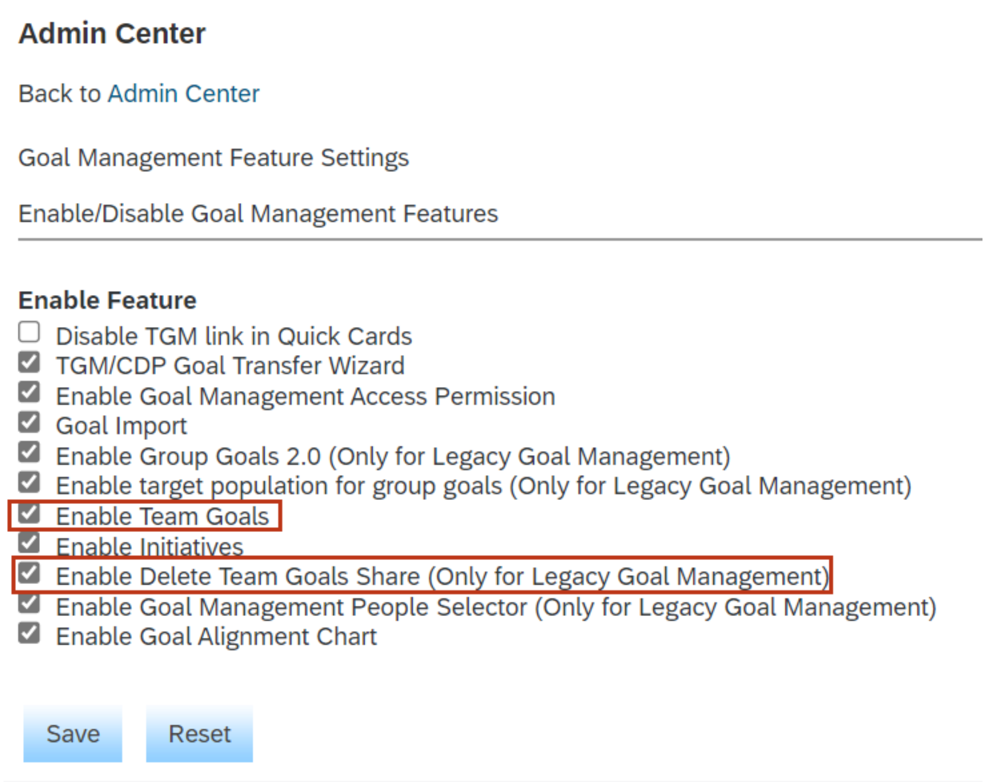
Prerequisites

- UI Version: GM v12
- Enable the option for Generic Objects in Provisioning

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

Configuration

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



3. Click *Save*.
4. Next, to use Team Goals, you must enable the following permissions in the *Manage Permission Roles* admin tool:
    - *Manage Team Goals* – grants permission to create, edit, and delete Team Goals
    - *Assign Team Goals* – grants permission to assign the Team Goals to members of your team
    - *Share Team Goals* – grants permission to share the Team Goals with other users, such that they too have administrative control over the shared Team Goals.

    > ⓘ Note
    >
    > The "Share Team Goals" permission is not bound by target population to facilitate co-ownership of Team Goals between multiple managers and matrix managers.
5. Click *Done* and on the Permission Role Detail page, click *Save Changes*.

You have successfully configured Team Goals in the application.

Answers to Some Key Questions on Team Goals

- **What is the difference between owner and co-owner of a team goal, and how do you recognize the difference?**
  At first, the creator of a team goal is its only owner. The owner then shares the team goal with other users and they become the co-owners. A co-owner has administrative privileges over the team goal, and can read, update, and delete (if the shared owner has permissions to delete) the team goal. If the owner of the team goal gives up access to the team goal, then one of the co-owners becomes the new owner. Currently, there is no

indicator to distinguish owner from co-owner. The UI only displays the user who created the team goal. To view the owner and/or the co-owner(s) of a team goal, click the corresponding *Actions* link and select *Share*.

- **Can I import/mass upload team goals?**
  Yes. While importing team goals, you need to set the `^Type` to `OBJECTIVE_TEAM`. When the team goal is imported, the 'created by' for the team goal (i.e., the owner) will be the login user. The following import actions are supported: `ADD`, `UPDATE`, `DELETE`, `ASSIGN`, `SHARE`, `UNSHARE`, and `UNASSIGN`.

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

- If an Admin creates team goals using the *Import Goals* tool, can managers perform `ADD`, `UPDATE`, `DELETE`, `ASSIGN`, `SHARE`, `UNSHARE`, and `UNASSIGN` on such team goals?
  Yes. When the Admin imports team goals, the Admin becomes the owner of the team goals. The Admin can share the team goals with managers to make them the co-owners of the team goals. Once they become the co-owners of the team goals, the managers can perform the `ADD`, `UPDATE`, `DELETE`, `ASSIGN`, `SHARE`, `UNSHARE`, and `UNASSIGN` actions on the team goals.
- **Are team goals stored as a type of goal that we can report on, like Group vs Personal? What reporting schema will be available for team goals?**
  Yes. You can pull a report with only team goals. Team goals are maintained like any other goals.
- **Will Team Goals replace Group Goals 1.0 or 2.0?**
  No. There are no plans to replace Group Goals 1.0 or 2.0 with Team Goals. The feature can be used either independent of Group Goals or in conjunction with Group Goals.
- **What happens when the owner of a team goal becomes inactive? Do the team members still see the team goal? Can the administrator add a co-owner, after the owner becomes inactive?**
  This is more likely a unique case, where the owner has not shared the team goal with anyone to co-own before becoming inactive. In such a case, the team goal will operate just like Group Goals 2.0 – where the team member will be able to see the assigned goal. Also, the team goal is accessible only to its owner and co-owners. So, if the administrator does not own or co-own the team goal, the administrator cannot add a co-owner, and the team goal will not be editable, accessible, or assignable any longer.
- **When an Admin - the owner of a team goal, makes only one manager the co-owner of that team goal, and gives up ownership, the manager automatically becomes the new owner of that team goal. If that manager becomes inactive, will the Admin be able to assume ownership of the team goal again?**
  No. Once users give up the ownership of the team goal, they have to request the new owner or the co-owners of the team goal to grant co-ownership of the team goal to them.
- **Is Team Goals applicable to the Development Goals? Or can you associate Learning activities to Team Goals?**
  No. Currently, Team Goals is supported only in Goal Management. Neither the Team Goals is applicable to Development Goals, nor can you associate Learning activities to it.
- **Will Team Goal have dynamic functionality like assigning to all direct reports, without manually adding and removing users?**

No. On the Assign Team Goal page, your hierarchy (direct reports) appears, and you may select each assignee individually or all your direct reports at one time. However, currently there is no support for dynamic Team Goal membership.

- **If I'm neither the owner or a co-owner of a team goal, can I perform the Assign, Share and Edit actions on the team goal?**
  To work with team goals you can either use the application UI, wherein you click the *Launch Team Goal* option on the Goal Plan and land on the *Team Goal* page, or use the *Import Goals* tool. So, if you are neither the owner nor the co-owner of a team goal, the following table explains what you can possibly do or not do with the team goal:

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

10.9 Permissions

10.9.1 Table Field Permissions

Permission tags give you the ability to control who can create, modify, or delete rows of a table within a goal plan.

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

Here is a sample XML that can be added to your permissions section of a goal plan. In this example, everyone can create, delete, or move rows of targets, tasks, milestones, or metric lookup tables.

Example

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

10.9.2 Table Column Permissions

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

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

Important Notes for Defining Table Column Permissions

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

Best Practices for Defining Table Column Permissions

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

Example

XML Example: Table Column Permissions

The use case is to create a Milestone table with four columns: *Milestone*, *Start Date*, *Due Date*, and *% Complete*. The manager (`EM`) has full access to all columns but the employee (`E`) only has access to the *% Complete* column. In this scenario, the manager is responsible for setting the milestones and the employee only for updating the milestone percent completion.

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

11 Developing Employees

Increase gender equity in who gets developed.

Developmental programs and learning opportunities build employee skills, capabilities, and careers. However, research shows that men receive career development more, especially when the development program is leadership focused. This impairs women from reaching top levels in organizations.

What causes gender bias in who gets developed?

- More men than women receiving developmental training because of implicit assumptions that men's careers and/or the organization will benefit more from it.
- Segregating learning relationships and communities by gender.
- Developing programs that favor people with fewer non-work obligations, which men are perceived to fit into.
- Women self-selecting out of development programs because they do not feel engaged or welcome.

Use SAP SuccessFactors technology to reduce gender bias in who gets developed:

- Train managers to be aware of their unintentional bias.
- Build gender-balanced learning communities.
- Let employees' interests and experiences guide the developmental opportunities they receive.
- Build learning and development experiences that engage everyone.
- Provide remote access to learning and development opportunities.

11.1 Overview of Career Development Planning

Career Development Planning enables employees to benefit from a wide range of employee development and career planning activities, and provides managers with standardized methods to track the success of their direct reports.

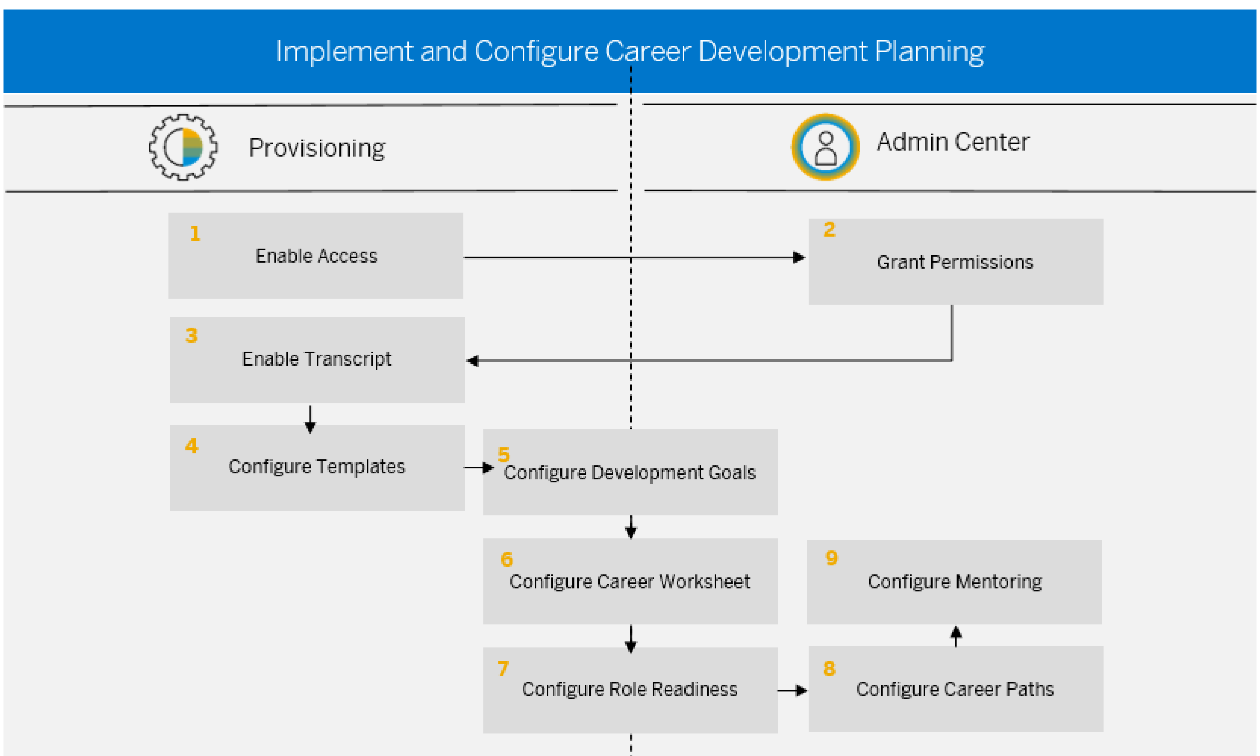
> Note
>
> This is an SAP SuccessFactors Business Beyond Bias feature. Use it to support processes that detect, prevent, or eliminate the influence of bias, helping you achieve your diversity and inclusion goals.

Consisting of various development-related features, Career Development Planning provides tools and opportunities for the following areas:

- Personal Growth
  - Undertaking relevant development activities
  - Ensuring follow-through on development plans
- Career Planning
  - Identifying interesting future job roles
  - Researching the skills and competencies needed to perform in those roles
- Corrective Remedies
  - Closing competency gaps with time-bound development plans
- Succession Candidates
  - Linking to development plans and career notes from Succession Planning
- Development Relationships
  - Connecting employees of different career levels in a development relationship where a more experienced person mentors a less experienced person

Recommended Implementation Sequence

To help you with your implementation, we recommend the following implementation sequence.



- Enabling Career Development Planning in Provisioning [page 193]
- Role-Based Permissions for Career Development Planning [page 194]

- Setting Up Integration with SAP SuccessFactors Learning [page 206]
- Configuring Templates [page 194]
- Development Goals [page 195]
- Career Worksheet [page 212]
- Role Readiness [page 220]
- Mentoring [page 235]
- https://help.sap.com/docs/SAP_SUCCESSFACTORS_SUCCESSION_AND_DEVELOPMENT/64ae041fbac7421f9816ca6d762f4612/8ec607433d76416a8cf119f33e65214e.html [https://help.sap.com/docs/SAP_SUCCESSFACTORS_SUCCESSION_AND_DEVELOPMENT/64ae041fbac7421f9816ca6d762f4612/8ec607433d76416a8cf119f33e65214e.html]

11.2 Enabling Career Development Planning in Provisioning

Select available settings in Provisioning to enable the features of Career Development Planning.

Prerequisites

You have access to Provisioning.

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

Procedure

1. In Provisioning, select a company.
2. Under *Edit Company Settings*, select *Company Settings*.
3. Under *Career & Development Planning*, select the following settings as needed.

Setting	Description
CDP Full (Development Plan)	This option is required for selecting the *Enable Development Plan V12* option.
Enable Development Plan V12	Enables Development Plan v12. This option requires the selection of the *CDP Full (Development Plan)* option.
Career Worksheet	Enables Career Worksheet v11 (not supported).
Career Worksheet V12	Enables Career Worksheet v12.

Setting	Description
Enable Career Path V2	Enables Career Path v2. If not selected, customers can use Career Path v1. To use Career Path v2, we recommend that you also enable the *Career Worksheet V12* option.
Transcript	This option is required for an integration with SAP SuccessFactors Learning.
Use default value for required field validation	Do NOT enable this option. If this option is enabled, when users change the status of learning activities to completed, the system compares the current value of each field with the default value in the template and reports errors. Default values are treated as mandatory fields.
Enable Add Learning Activity Manually	Enables users to create custom learning activities in a development goal plan.

4. Save your changes.

11.3 Role-Based Permissions for Career Development Planning

When you set up Career Development Planning, it's important to grant role-based permissions to right people.

Administrators with required permissions can manage and configure various features in Career Development Planning. Users with required permissions can access and use the various features.

To see a full list of the permissions for Career Development Planning, refer to List of Role-Based Permissions by using filters and key words.

11.4 Configuring Templates

Configure the templates required for Career Development Planning features to define settings, permissions, and so on.

Prerequisites

You have access to Provisioning.

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

Context

The following features require template configuration before you use them:

- Development Goals
- Learning Activities
- Career Worksheet

Procedure

1. In Provisioning, select a company.
2. Under *Managing Plan Template*, choose one of the following options.
    - Import/Update/Export Development Plan Templates
    - Import/Update/Export Learning Activities Templates
    - Import/Update/Export Career Worksheet Templates
3. Import a new template, or export an existing template, edit the template, and upload it.
4. Optional: Select a default template, change a template to active or inactive, and adjust the display order.

Next Steps

For more information on each template, refer to respective topics in Related Information.

11.5 Development Goals

Users can create development goals for their career development. They can also add competencies and learning activities to development goals to guide their growth.

11.5.1 Development Goal Plan Templates

A development goal plan template, specified in an XML file, defines the categories and fields of users' development goals.

Development goal plan templates are similar to goal plan templates in Goal Management. For more information on configuring templates, such as configuring elements and fields, refer to Working with Goal Plan Templates.

Here're the differences from goal plan templates you need to know.

- Development goal plan IDs must be in the range of 2001-2999.

- The value of the `obj-plan-type` element should be "Development".
- If used, the learning activity template must be referenced before field definitions, for example, `<learning-activities template-id="4201"/>`.

> **Note**
>
> Only one learning activity template can be active at a time. Make sure your active development plans always reference the latest default learning activity template. Otherwise, when a new default learning activity template is introduced, existing learning activities disappear from existing development plans.

- Cascading and aligning are not supported in development goals. Remove the following permissions from your template:
    - `cascade-push`
    - `cascade-pull`
    - `cascade-align`
    - `unalign-parent`
    - `unalign-child`
- You can define various goal statuses. Note that the last status, regardless of the name, would be considered as one that indicates completion of the goal. For goals of this status, no more learning activities can be created. Therefore, make sure that the *Completed* status is always the last status on the list.
- When you add custom fields, do not use punctuation or any special characters, for example, "`-`" or "`_`", in field IDs. Spell check is not supported in custom fields with IDs that contain punctuation or special characters.
- In most cases, customers have a single development plan instead of one plan per year. Development goals, unlike performance goals, frequently span multiple years, especially as career-oriented features are added to the product. Customers who want to separate completed goals from in-progress goals, can use goal categories to achieve this. Additionally, if customers use the Career Worksheet, it can only be linked to a single development goal plan template.
- To make development goal fields visible in People Profile, add the `show-in-pp3=”true”` attribute to the `field-definition` element.
- If you've configured goal plan states, note the following user permissions for activities and learning activities:
    - If users can't edit goals according to the setup of goal plan states, they can still create activities with the Continuous Performance Management permissions.
    - If users can't edit goals according to the setup of goal plan states, they can still add and remove learning activities according to the permissions defined in the learning activity template.
    - If users can't view goals according to the setup of goal plan states, they can't view associated learning activities either.
- The comments field isn't supported in Mobile apps. If you're using Mobile apps for development goals, remove the comments field definition from your template.

11.5.2 Linking Development Goals to Competencies

Configure the competencies field in a development goal plan template, so that users can link development goals to one or more competencies that they're trying to develop.

Prerequisites

→ Remember

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

Context

The competencies field can list competencies in a variety of ways:

- By roles
- By forms
- By libraries
- By categories

The competencies users can link are those defined in the current logged-in locale. If a competency is defined in English only, and when a user signs in the system with Chinese, the competency isn't available for linking.

You can only have one competencies field per development plan.

Procedure

1. In a development goal plan template, add the competencies field definition.

```
<field-definition id="competency" type="competencies" required="false"
detail="false"  viewdefault="on"  showlabel="false"
field-show-coaching-advisor="false">
  <field-label>Competencies</field-label>
  <field-description>Competencies</field-description>
  <field-format>use-competencies</field-format>
</field-definition>
```

2. To use behaviors in this field instead of competencies, make sure that behaviors are added to competencies, and set the <field-format> tag within the <field-definition> block as follows.

```
<field-definition id="competency" type="competencies" required="false"
detail="false"  viewdefault="on"  showlabel="false"
field-show-coaching-advisor="false">
  <field-label>Competencies</field-label>
  <field-description>Competencies</field-description>
```

```
  <field-format>use-behaviors</field-format>
</field-definition>
```

Only the competencies that have behaviors are shown to users. They can select behaviors under the parent competency when creating a development goal. The competencies field then lists the selected behaviors.

3. To require users to choose a single competency, and prevent them from selecting multiple competencies, set the `<field-format>` tag within the `<field-definition>` block as follows.

```
<field-definition id="competency" type="competencies" required="false"
detail="false"  viewdefault="on"  showlabel="false"
field-show-coaching-advisor="false">
  <field-label>Competencies</field-label>
  <field-description>Competencies</field-description>
  <field-format>use-competencies-single</field-format>
</field-definition>
```

The competencies field uses a dropdown list instead of a list with checkboxes.

> **Note**
>
> The single-select option isn't supported for behaviors.

4. To define a source of competencies, add the `<competency-filters>` tag before the `<field-definition>` block as follows.

<table>
<tr><th>Source of Competencies</th><th>XML Configuration</th></tr>
<tr><td>Forms and roles</td><td>No configuration</td></tr>
<tr><td>Forms</td><td><pre>...
</default-category>
<competency-filters>
  <exclude type="roles"/>
</competency-filters>
<field-definition ...></pre>
Note
When you mass create forms with custom competencies, those competencies are not saved to the necessary places in the system to be linked to employees, until the form is routed to the next step. If it's the first time the competencies have been linked to the employees, development goals don't display the competencies until the form is routed. To get around this, users can delay setting development goals until a later step in the route map, or you can add those competencies to all roles related to the required users.</td></tr>
<tr><td>Roles</td><td><pre>...
</default-category>
<competency-filters>
  <exclude type="forms"/>
</competency-filters>
<field-definition ...></pre></td></tr>
</table>

Source of Competencies	XML Configuration

Roles, except hidden competencies

```
...
</default-category>
<competency-filters>
  <exclude type="forms"/>
  <exclude type="hidden"/>
</competency-filters>
<field-definition ...>
```

A specific library

```
...
</default-category>
<competency-filters>
  <exclude type="forms"/>
  <exclude type="roles"/>
  <include type="library"
match="library name"/>
</competency-filters>
<field-definition ...>
```

> **Note**
>
> If you're using Job Profile Builder, and define a library or category as a competency filter, the filter works in different locales. Before that, make sure that competencies have corresponding translations in desired locales. The system filters the competencies by library or category according to the default locale defined in Provisioning. However, when you change the signed-in locale (for example, from English to Chinese) via *Options* > *Change Language*, the competencies in Chinese are filtered out.
>
> If you're using Job Description Manager, competency libraries of multiple languages aren't supported.

A specific category

```
...
</default-category>
<competency-filters>
  <exclude type="forms"/>
  <exclude type="roles"/>
  <include type="category"
match="category name"/>
</competency-filters>
<field-definition ...>
```

A specific category of a specific library, except hidden competencies

```
...
</default-category>
<competency-filters>
  <exclude type="forms"/>
  <exclude type="roles"/>
  <exclude type="hidden"/>
  <include type="category"
match="category name"
library="library name"/>
```

Source of Competencies	XML Configuration
	</competency-filters> <field-definition ...>
Multiple categories	... </default-category> <competency-filters> <exclude type="forms"/> <exclude type="roles"/> <include type="category" match="category name A"/> <include type="category" match="category name B"/> </competency-filters> <field-definition ...>
(For customers using Job Description Manager) Roles, except skills and questions associated to roles	... </default-category> <competency-filters> <exclude type="forms"/> <exclude type="skills"/> <exclude type="questions"/> </competency-filters> <field-definition ...>

5. To allow users to add additional competencies from all available libraries, add the following switch.

```
<switch value="on" for="show-competency-browser"/>
```

When users create a development goal, a *Competencies* link appears next to a list of available competencies. When they choose the link, the *Add Competencies* dialog pops up, where competencies are organized into hierarchical lists of categories under tabs for each library. Users can select competencies to add them to the development goal.

Results

The template is configured properly for users to link competencies or behaviors.

11.5.3 Enabling Coaching Advisor

Enable Coaching Advisor in a text area field for development goals, so that users can add predefined content in Coaching Advisor to development goals.

Prerequisites

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

Context

When users choose *Coaching Advisor* in the text area field, a popup window showing the competencies for the employee's role appears. Users can drill down on to find predefined content to add to development goals.

If you're using Job Profile Builder, Coaching Advisor content can be managed in *Manage Writing Assistant and Coaching Advisor*. For more information, refer to Adding Writing Assistant and Coaching Advisor Content from the UI.

Procedure

In a development goal plan template, set the `field-show-coaching-advisor` attribute of a text area field to `true`.

```
<field-definition id="description" type= "textarea" required= "false"
detail="false" viewdefault= "on" showlabel= "false" field-show-coaching-
advisor="true">
```

Results

Coaching Advisor is enabled for development goals.

11.5.4 Showing Achievements Linked to Goals

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

Prerequisites

Continuous Performance Management is enabled.

Context

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

Procedure

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

Results

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

11.6 Learning Activities

In development goal plans, users can add and create learning activities to help achieve their development goals. Administrators can also import learning activities for users.

> **Note**
>
> Make sure you've enabled Transcript learning and set up integration with SAP SuccessFactors Learning.

Here's a list of features supported for managing learning activities:

Feature	Option in Legacy Development Goals	Option in Latest Development Goals	Prerequisites	More Details
Add learning directly from SAP SuccessFactors Learning	*Add New Learning Activity* > *Find in Catalog*	*Add Learning* > *From Library*	• Users have the access permission to the learning activity template in *User Permissions* > *Goals* > *Goal Plan Permissions*. • Users have action and field permissions in the learning activity template.	Users can't add learning from SAP SuccessFactors Learning when acting as a proxy as another user.

Feature	Option in Legacy Development Goals	Option in Latest Development Goals	Prerequisites	More Details
Add learning from SAP SuccessFactors Learning according to the competencies linked to development goals	*Add New Learning Activity* > *Search by Competency*	*Add Learning* > *By Competency*	• The `competencies` field is configured in the development goal plan template. • Users have linked competencies to development goals. • Users have the access permission to the learning activity template in *User Permissions* > *Goals* > *Goal Plan Permissions*. • Users have action and field permissions in the learning activity template.	When users choose the option, a dialog pops up where they can see the competencies they've linked and a list of learning items related with each competency. They can also see two ratings for each competency to guide them on how much they need to work on the competency: • *Current Rating*: The most recent rating that users have received for a competency from Performance Management forms or other sources. • *Expected Rating*: The expected rating of a competency specific to users' job role, which is defined in Job Profile Builder.
Create custom learning activities	*Add New Learning Activity* > *Custom Learning Activity*	*Create Custom Learning*	• *Enable Add Learning Activity Manually* is selected in Provisioning. • Users have the access permission to the learning activity template in *User Permissions* > *Goals* > *Goal Plan Permissions*. • Users have action and field permissions in the learning activity template.	

Feature	Option in Legacy Development Goals	Option in Latest Development Goals	Prerequisites	More Details
Connect development goals with learning activities	The option is available when users create or edit a custom learning activity. Users can link development goals to learning activities, but can't link learning activities to development goals.	*Link Custom Learning* Users can link learning activities to development goals, but can't link development goals to learning activties.	• Users are able to create custom learning activities. • The `dev_goals` field is configured in the learning activity template. • Users have `read` and `write` permissions to the `dev_goals` field.	
Remove learning from development goal plans	*Delete*	*Remove*	• Users have the access permission to the learning activity template in *User Permissions* > *Goals* > *Goal Plan Permissions*. • Users have action and field permissions in the learning activity template.	
Import custom learning activities	*Admin Center* > *Import Development Goals*	*Admin Center* > *Import Development Goals*	See more details.	Importing Custom Learning Activities

> **Note**
>
> - In a development goal plan that was migrated from another development goal plan, any updates to existing learning activities in the new development goal plan are reflected in the old development goal plan. This situation doesn't happen if learning activities are added to the new development goal plan after migration.
> - Users are not allowed to add or create learning activities after development goals are completed.
> - If you've enabled the *Prevent removal of learning activities from completed development goals* setting in *Manage Templates* > *Development* > *<development goal plan template>* > *General Settings*, users are not allowed to remove learning activities after development goals are completed. This setting is only applicable to the latest version of Development Goals.

11.6.1 Setting Up Integration with SAP SuccessFactors Learning

Set up integration with SAP SuccessFactors Learning in Provisioning so that users can add or create learning activities in their development goal plan.

Prerequisites

- You've set up and configured permissions to SAP SuccessFactors Learning.
- → Remember

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

Procedure

1. In Provisioning, select a company.
2. Under *Edit Company Settings*, select *Company Settings*.
3. Under *Career & Development Planning*, select *Transcript*.

   Note

   We **do not** recommend you select *Use default value for required field validation*.
4. Select *Enable Add Learning Activity Manually* to allow users to create custom learning activities.
5. Select *Enable SuccessFactors Learning integration* and specify the *SuccessFactors Learning Integration URI*.

   You can request the URI from the Data Center Operations.

   Example

   https://companyID.scdemo.<app-server-domain>.com
6. Optional: If you use Akamai or reverse proxy, you should specify the *SuccessFactors Learning Integration API URI*.
7. Save your changes.

Next Steps

You need to configure and import the learning activity template.

11.6.2 Fields in Transcript Learning Activity Template

The following table describes the supported fields in a Transcript learning activity template.

Field ID	Description	Entity	Type	Length
`guid`	Unique ID of a learning activity	Common	String	255
`name`	Name of a learning activity	Common	String	256
`description`	Description of a learning activity	Common	String	4,000
`language`	Language	Common	String	32
`type`	Product type	Common	String. It can be configured as the `text` type only.	60
`category`	Category	Common	String	256
`duration_days`	Duration days of a learning activity	Common	Number	
`duration_hours`	Duration hours of a learning activity	Common	Number	
`source_type`	Source of a learning activity (used in the system integrated with a third-party learning system)	Common	String	128
`source_id`	Unique key of a learning activity (used in the system integrated with a third-party learning system)	Common	String	128
`link`	External link to open a learning activity	Common	String	1,024
`cert_training`	Indicates whether a learning activity offers a certificate	Common	String	1
`certifications`	Certificate information	Certificate	Table	
`name`	Name of a certificate	Certificate	String	1,024
`issue_date`	Issue date of a certificate	Certificate	Date	
`expire_date`	Expiry date of a certificate	Certificate	Date	

Field ID	Description	Entity	Type	Length
`dev_goals`	Development goals associated with a learning activity. You must grant users write permission to this field.	Certificate	Text	
`assignee`	Assignee of a learning activity	Learning	String	100
`score`	Score	Learning	String	32
`status`	Status	Learning	String	128
`cost`	Cost	Learning	Number (12,2)	
`currency`	Currency	Learning	String	10
`purpose`	Purpose	Learning	String	1,024
`start_date`	Start date	Learning	Date	
`due_date`	Due date	Learning	Date	
`planned_by`	Planned by	Learning	String	100
`planned_date`	Planned date	Learning	Date	
`begin_date`	Begin date	Learning	Date	
`end_date`	End date	Learning	Date	
`completed_by`	Completed by	Learning	String	100
`completed_date`	Completed date **Note** This field is to automatically record the date when the status is set to "Completed". We recommend that do not grant users the write permission to this field.	Learning	Date	
`confirmed_by`	Confirmed by	Learning	String	100
`confirmed_date`	Confirmed date	Learning	Date	
`confirmed_status`	Indicates whether a learning activity is confirmed	Learning	String	1
`customtext1`	Custom text	Learning	String	4,000
`customtext2`	Custom text	Learning	String	4,000

Field ID	Description	Entity	Type	Length
customtext3	Custom text	Learning	String	4,000
customtext4	Custom text	Learning	String	4,000
customtext5	Custom text	Learning	String	4,000
customtext6	Custom text	Learning	String	4,000
customtext7	Custom text	Learning	String	4,000
customtext8	Custom text	Learning	String	4,000
customtext9	Custom text	Learning	String	4,000
customtext10	Custom text	Learning	String	4,000
customtext11	Custom text	Learning	String	4,000
customtext12	Custom text	Learning	String	4,000
customtext13	Custom text	Learning	String	4,000
customtext14	Custom text	Learning	String	4,000
customnum1	Custom number	Learning	Number	
customnum2	Custom number	Learning	Number	
customnum3	Custom number	Learning	Number	
customnum4	Custom number	Learning	Number	
customdate1	Custom date	Learning	Date	
customdate2	Custom date	Learning	Date	

Mandatory Fields

The following fields are mandatory for adding learning from SAP SuccessFactors Learning and field data is synced with data in SAP SuccessFactors Learning:

- `assignee`
- `completed_date`
- `name`
- `description`
- `status`
- `guid`
- `type`
- `dev_goals`

Supported Field Types

The following field types are supported:

- `text`
- `textarea`: Supports Coaching Advisor, Legal Scan, and Spell Check.
- `date`
- `percent`
- `bool`
- `enum`
- `checkbox`
- `number`

> ⓘ Note
>
> The `comment` field type is **not** supported in the learning activity template. If users do need to add comments, they can add them to corresponding development goals.

11.6.3 Configuring Status Field

Configure the `status` field in the learning activity template so that users can choose statuses for learning activities.

Prerequisites

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

Context

The default statuses in the learning activity template are as follows:

- Planned
- Completed
- Locked
- Deleted
- Failed

When goals are completed, all the related learning activities must be set to *Completed* or *Locked*, after which no new statuses can be added to the learning activities.

→ Recommendation

To allow users to add learning from SAP SuccessFactors Learning, you must configure the Planned status. We also recommend you configure the Completed and Failed statuses.

ⓘ Note

Changes to the learning statuses made in SAP SuccessFactors Learning are synced to associated development goals. However, you must make sure that users have signed in to the Learning solution with the SAP SuccessFactors HCM suite credentials. Any status changes users make, except the Completed status, while still using the Learning sign-in credentials are saved in the solution only and not synced to development goals.

Procedure

1. In Provisioning, go to *Managing Plan Template* > *Import/Update/Export Learning Activities Templates*.
2. Export the learning activity template.
3. Add a field definition for the `status` field.

   The field type is `enum`. You can use `<enum-value>` and `<enum-label>` to define status options and use `<default-value>` to define the default status.

   Sample Code

   ```
   <field-definition id="status" type="enum" required="false" detail="false"
   viewdefault="on" showlabel="false" field-show-coaching-advisor="false"
   cascade-update="push-down">
     <field-label>Status</field-label>
     <enum-value value="Planned">
       <enum-label>Planned</enum-label>
     </enum-value>
     <enum-value value="In Progress">
       <enum-label>In Progress</enum-label>
     </enum-value>
     <enum-value value="Completed">
       <enum-label>Completed</enum-label>
     </enum-value>
     <default-value>Planned</default-value>
   </field-definition>
   ```
4. Grant users the `read` and `write` permissions to this field.
5. Add this field to `<plan-layout>` and `<transcript-detail-layout>` to define the field layout.
6. Save the template and upload it to Provisioning where you exported the template.

11.7 Career Worksheet

Career Worksheet allows users to manage the job roles they're considering and the associated competencies, so as to gain an understanding of the development efforts required to move into target roles.

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

Each role on the Career Worksheet displays the job code, description, and required competencies. It can also display a gap analysis for each competency, comparing the last rating specified for the employee with an expected rating for the role. If a competency has either a last rating or expected rating, or both, a horizontal bar graph for ratings is shown below the competency.

11.7.1 Permissions for Career Worksheet

You can manage the access permissions to Career Worksheet and specific Career Worksheet plans. In addition, you can also define the permissions to view, add, or remove the target job roles in the Career Worksheet plans or the view permissions of fields in the plans.

Required role-based permissions are as follows:

- *User Permissions* > *Career Development Planning* > *Career Development Plan (CDP) Access Permission*: Allows users to access the *Development* module.
- *User Permissions* > *Career Development Planning* > *Career Worksheet Access Permission*: Allows users to access the *Career Worksheet* tab.
- *User Permissions* > *Goals* > *Goal Plan Permissions* > *<Career Worksheet template>*: Allows users to view the content of the Career Worksheet of their own or of people who belong to their target population.

11.7.1.1 Permission Settings in Career Worksheet Template

The detailed permission to target job roles and read permission to certain fields in a career worksheet plan are defined in the career worksheet template. Note that the career worksheet template can only be exported for editing through Provisioning.

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

Permission Roles

The permissions in the career worksheet template are assigned based on roles, and the common roles that you can use are as follows:

- `E`: Employee
- `EM`: Employee's managers, including all the managers in the reporting line
- `EH`: Employee's HR manager
- `EX`: Employee's matrix manager
- `*`: All users in the system

Permissions over Target Job Roles

You can define detailed permissions over the target job roles in the *Roles I'm Considering...* section, that is, who can view, add, or remove target job roles of an user.

Following are the available permissions and XML definition examples that you can use in the template file:

Permission	Description	XML Definition Example

`private-access`	The permission to view the available target roles of an employee.	Employees themselves, all the managers in their reporting lines, and their HR manager can view the target roles. For this scenario, you can define the definition as follows:
		`<permission for="private-access">`
		`<description><![CDATA[Employees and their managers up the reporting chain may view “Job Roles I’m Considering”.]]></description>`
		`<role-name><![CDATA[E]]></role-name>`
		`<role-name><![CDATA[EM+]]></role-name>`
		`<role-name><![CDATA[EH]]></role-name>`
		`</permission>`

Permission	Description	XML Definition Example
`create`	The permission to add target job roles for the employee.	Only the employees themselves and their direct managers can add target job roles. For this scenario, you can define the definition as follows: `<permission for="create"> <description><![CDATA[Only the employee and their direct manager may add a role in a user's worksheet.]]></description> <role-name><![CDATA[E]]></role-name> <role-name><![CDATA[EM]]></role-name> </permission>`
`delete`	The permission to remove target job roles from the section.	Only the employees themselves can remove target job roles. For this scenario, you can define the definition as follows: `<permission for="delete"> <description><![CDATA[Only the employee may delete role in his/her worksheet.]]></description> <role-name><![CDATA[E]]></role-name> </permission>`

Fields for Read Permission

You can define the read permissions for the fields in the career worksheet plans. Note that the write permission is not supported.

The read permission can be defined for the following fields:

- `readiness_meter`
  The percentage rate of readiness for the target roles.
- `development_goals`
  Development goals associated with each competency or behavior. The number of development goals and the button to add a new development goal are displayed by default. But the details of the development goals nested under a competency or behavior is controlled by the permission defined here.

  > **Note**
  >
  > By default, the read and write permissions for the user are derived from the development plan template configuration. If a user is granted the read permission in the career worksheet template without permission to view development goals, they still cannot view the details of the goals.

- `competency_name`
  Name of the competencies.

> ⓘ Note
>
> If a role has the read permission to other competency-related details (for example, `last_rated_date` and `last_rated_form`), this read permission to `competency_name` should also be granted. Otherwise, the competency will be listed as "undefined" as its name.

- `last_rated_date`
  The date on which the competency was last rated.
- `last_rated_form`
  The form in which the competency was last rated.
- `gap_graph`
  A graphical representation of comparison between the expected competency rating and the user's latest rating.
- `last_rating`
  The user's latest competency rating. Note that the read permission for `last_rating` is a prerequisite for a user to view the graphical representation (`gap_graph`). If you have defined the read permission for `gap_graph`, define it for `last_rating` as well.

11.7.2 Career Worksheet Templates

A Career Worksheet template, specified in an XML file, defines fields, features, and permissions of Career Worksheet.

The following elements in the template can be modified:

- Field labels
- Inclusion of fields, for example, you can remove the `gap_graph` field if you don't want to include the gap analysis graph.
- The `rating-scale-id`, in the `last_rating` field definition. It's the normalized scale used for showing rating comparisons.
- Permissions for features and fields
- The maximum number of job roles that users can add, with the `max-per-category` attribute

> Example
>
> ```
> <category-config>
>   <max-per-category>5</max-per-category>
> </category-config>
> ```

> → Recommendation
>
> Maximum recommended roles is 20 for performance reasons.

- Instructions on the top of the page, with the `text-replacement` tag

Fields Valid in Career Worksheet Template

ID	Type
`competency_name`	text
`last_rated_form`	text
`last_rated_date`	date
`last_rating`	number
`gap_graph`	number
`development_goals`	text
`readiness_meter`	percent

Here are notes about configuring the Career Worksheet template:

- Don't change any field IDs or other elements of the template.
- You can't create custom fields for use in Career Worksheet.

11.7.2.1 Configuring Template to Show Development Goals

Configure the Career Worksheet template to show the number of development goals for a competency created from users' default development plan. Users can also create development goals for the competency directly in the Career Worksheet.

Prerequisites

The development goal plan template must include a `competencies` field.

> Note
>
> If you use behaviors instead of competencies, make sure that the `competencies` field is configured accordingly.

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

Context

Users who have read and write permissions for the `competencies` field in the development goal plan template can view and add development goals in the Career Worksheet. The development goals that users create from the Career Worksheet are added to their default development plan.

Because a development goal can be linked to more than one competency, the same goal can be counted more than once in the Career Worksheet. The same goal can also be represented in more than one job role.

Procedure

1. In Provisioning, go to *Manage Plan Template* > *Import/Update/Export Career Worksheet Templates*.
2. Export the template in which you want to enable the feature.
3. Add the `development_goals` field definition.

   Sample Code

   ```
   <field-definition id="development_goals" type="text" required="true"
   detail="true" viewdefault="on" showlabel="false" field-show-coaching-
   advisor="false" cascade-update="push-down">
       <field-label>Development Goals</field-label>
       <field-label lang="de_DE">Entwicklungsziele</field-label>
       <field-label lang="es_ES">Objetivos de desarrollo</field-label>
       <field-label lang="fr_FR">Objectifs de développement</field-label>
       <field-label lang="ja_JP">開発目標</field-label>
       <field-label lang="ko_KR">개발 목표</field-label>
       <field-label lang="pt_BR">Metas de desenvolvimento</field-label>
       <field-label lang="ru_RU">Цели развития</field-label>
       <field-label lang="zh_CN">发展目标</field-label>
       <field-label lang="zh_TW">發展目標</field-label>
     </field-definition>
   ```

4. Optional: To show the competency description by default, add the following switch.

   ```
   <switches>
       <switch for="cws-dispoption-competency-desc" value="on"/>
   </switches>
   ```

5. Save the template and upload it to Provisioning where you exported the template.

Results

Development goals for competencies are shown in the Career Worksheet.

11.7.2.2 Configuring Template to Show or Hide Behaviors

By default, behaviors that are mapped to a job role are shown in the list of required competencies for the role. You can configure the Career Worksheet template to decide whether to show behaviors and behavior ratings, and whether to include behavior ratings in role readiness calculation.

Prerequisites

→ Remember

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

Procedure

1. In Provisioning, go to *Manage Plan Template* > *Import/Update/Export Career Worksheet Templates*.
2. Export the template in which you want to configure the use of behaviors.
3. Add the following element after the `text-replacement` element and before the `field-definition` element.

   Sample Code

   ```
   <behaviors hide="false" hide-ratings="false" use-in-readiness="true"/>
   ```

   a. To hide behaviors, set `hide="true"`.

      Behaviors aren't shown or included in role readiness calculation.

   b. To show behaviors but hide ratings, set `hide="false"` and `hide-ratings="true"`.

      Behaviors are shown for each competency, but behavior ratings aren't shown or included in role readiness calculation.

   c. To show behaviors and ratings, but exclude the ratings from role readiness calculation, set `hide="false"`, `hide-ratings="false"`, and `use-in-readiness="false"`.

      Behaviors and ratings are shown for each competency, but aren't included in role readiness calculation.
4. Save the template and upload it to Provisioning where you exported the template.

Results

The use of behaviors in Career Worksheet is configured based on your needs.

11.7.2.3 Configuring Template to Hide Current Employees and Open Positions

In the Career Worksheet, by default, users can view the number of employees who are in their target roles and the number of open positions of their target roles. You can configure the Career Worksheet template in Provisioning to hide both of them or open positions only.

Prerequisites

Employee Directory and *True Position Hierarchy* are selected in Provisioning.

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

Context

In the Career Worksheet, users can view the information of at most 20 current employees by choosing *[Number] Employees*. If the number of current employees is more than 20, they can choose *Show All [Number] Employees* to view all on the Directory Search page.

If *Employee Directory* isn't selected in Provisioning, users can only view the number of current employees, but can't choose *[Number] Employee* to view the detailed information.

Open positions are from SAP SuccessFactors Recruiting. Users must have the *User* > *Recruiting Permissions* > *Careers Tab Permission* permission to view the number of job openings in the Career Worksheet.

If SAP SuccessFactors Recruiting isn't enabled, open positions are from legacy Succession positions, not from MDF positions. The prerequisite for legacy Succession positions is as follows: *Position* is selected for *Succession nomination method* in Provisioning.

Procedure

1. In Provisioning, go to *Manage Plan Template* > *Import/Update/Export Career Worksheet Templates*.
2. Export the template in which you want to disable the feature.
3. Follow one of the following options based on your business need.
   - To hide both current employees and open positions, change the `cws-people-role` attribute from `"true"` to `"false"`.
   - To hide open positions only, add the following XML code in the `<switches>` element:

     ```
     <switch for="hide-position-count" value="on" />
     ```

Sample Code

```
<obj-plan-template spellchk="false" new-obj-share-status-public="false"
instructions-viewdefault="on" alerts-viewdefault="on" cascade-parent-
viewdefault="off" cascade-child-viewdefault="off" pager-max-objs-per-page="0"
pager-max-page-links="0" pager-max-children-per-parent="-1" display-alignment-
format="names" more-details-child-format="original" share-confirm="false"
unshare-confirm="false" allow-group-goal="false" goal-tree-link="true"
expand-collapse-categories="false" use-text-for-privacy="false" cws-people-
role="false" overwrite-target-population="true" swap-goal-link="false"
learning-activity-deep-link="true" show-total-goalscore="false" show-goal-
id="false">
  <obj-plan-id>5001</obj-plan-id>
  <obj-plan-type>CareerWorksheet</obj-plan-type>
  <obj-plan-name>Career Worksheet</obj-plan-name>
  <obj-plan-name lang="de_DE">Karriere-Arbeitsblatt</obj-plan-name>
  <obj-plan-name lang="es_ES">Hoja de cálculo profesional</obj-plan-name>
  <obj-plan-name lang="fr_FR">Fiche Carrière</obj-plan-name>
  <obj-plan-name lang="ja_JP">キャリアワークシート</obj-plan-name>
  <obj-plan-name lang="ko_KR">경력 워크시트</obj-plan-name>
  <obj-plan-name lang="pt_BR">Planilha de carreira</obj-plan-name>
  <obj-plan-name lang="ru_RU">Ведомость карьерного роста</obj-plan-name>
  <obj-plan-name lang="zh_CN">职业工作表</obj-plan-name>
  <obj-plan-name lang="zh_TW">職業工作表</obj-plan-name>
  <obj-plan-desc><![CDATA[Example Career Worksheet]]></obj-plan-desc>
  <obj-plan-lastmodified>6/10/20 5:55 AM</obj-plan-lastmodified>
  <obj-plan-start>01/01/2020</obj-plan-start>
  <obj-plan-due>12/31/2020</obj-plan-due>
  <switches>
    <switch for="hide-position-count" value="on" />
    <switch for="new-role-readiness-calculation" value="on" />
```

4. Save the template and upload it to Provisioning where you exported the template.

11.7.3 Role Readiness

Role readiness provides valuable metrics that help employees plan their career development. By adding roles they are considering to Career Worksheet, they can start regularly tracking and measuring development to prepare themselves for the future roles and responsibilities.

How Role Readiness is Calculated

A role might require a number of competencies and each competency can have an expected rating. An employee's readiness for the role depends on whether the employee’s current competencies are up to the expected ratings. If Job Profile Builder is used, when a competency's expected rating is 0, 0 is a valid value in the calculation of role readiness. If Job Decription Manager is used, when a competency's expected rating is 0, the expected rating is regarded as N/A (no expected rating) in the calculation of role readiness.

You have two options to calculate the role readiness:

- Summing up the number of ready competencies
- Averaging out competency readiness

Both calculation options require the employees' current competency ratings of competencies, which can come from the following:

- Latest rating from performance review
- Average rating in the 360 reviews

By default, the system uses the latest rating information in the system. You can also specify a specific form or a couple of forms as the source of the existing ratings.

11.7.3.1 Calculation Options

11.7.3.1.1 Summing up Number of Ready Competencies

Role readiness can be calculated as the percentage ratio between employees' ready competencies and the total of required competencies for the role: **(number of competencies the employee is ready for)/(total number of required competencies) %**.

To determine whether an employee is ready in a competency, the system checks the employee's current rating and the expected rating required for the future role. If the current rating equals to or exceeds the expected rating, the employee is ready for this competency.

> Note
>
> However, you may not have an expected rating for all competencies, in that case, the employee is regarded as not ready for that competency regardless of his or her current rating.

For example, a role requires five competencies. For one of the competencies, the expected rating is **4** and the employee's current rating is **5**. And for all other four competencies, the employee isn't ready, either because the current rating is lower than expected or because the competency hasn't been rated. Then, the role readiness is calculated as (1/5) x 100% = **20%**.

Behaviors you have defined for competencies in Job Profile Builder can also be considered when calculating role readiness. Turn on the XML switch in the Career Worksheet template, and the role readiness is calculated as **(total number of current competencies and behaviors that the employee is ready for)/(total number of required competencies and behaviors)%**.

For example, a role requires two competencies and each competency has two specified behaviors. One of the competencies and one of the behaviors equal to or exceed the expected ratings. In this case, the role readiness is calculated as (1+1)/6 x 100% = **33%**.

11.7.3.1.2 Averaging out Competency Readiness

With this averaging-out calculation option, the system first calculates readiness for each required competency for a role, and then calculates an average of the competency readiness, which is used as the role readiness.

Competency readiness is calculated as follows:

Scenario	Competency Readiness
The current competency rating equals to or is higher than the expected competency rating.	100%
The employee's current competency rating is lower than the expected rating.	(Current rating – smallest rating in the rating scale)/(Expected rating – smallest rating in the rating scale) 100%
The employee doesn't have any rating for a competency or the competency hasn't been rated.	0
The competency doesn't have an expected rating.	0

> ⓘ Note
>
> The calculation is done in the rating scale defined in the Career Worksheet template. If you use a different scale to rate the employee's competencies, the system will normalize the ratings for calculation.

Then, with the readiness for each competency calculated, the system adds up the readiness rating for all required competencies in a role and divides the total by the number of competencies.

If you have defined behaviors and enabled behavior rating in role readiness calculation, the calculation logic of behavior readiness is the same and role readiness is the average of both competency and behavior readiness.

Example

For a rating scale from **0** to **5**, see the following expected ratings and the employee's current rating.

Competency	Expected Rating	Current Rating	Competency Readiness
Engineering	4	5	100%
Project Management	3	2	66.67%
Communication	4	3	75%
Email Etiquette	2	2	100%
Change Management	2	1	50%
Presentation	4	2	50%

Then, the role readiness is calculated as (100% + 66.67% + 75% +100% + 50% + 50%)/6 x 100% = **74%**.

11.7.3.2 Configuring Calculation Option in Career Worksheet Template

To specify the calculation option the system uses to calculate role readiness, define the calculation option switch in the Career Worksheet template.

Prerequisites

You have access to Provisioning.

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

Procedure

1. In Provisioning, go to *Manage Plan Template* > *Import/Update/Export Career Worksheet Templates*, and export the template.
2. In the template, add the XML switch that determines the calculation option:

Calculation Option	XML Definition

By Summing up Number of Ready Competencies	`<switches>`
	`<switch for="new-role-readiness-calculation" value="off"/>`
	`</switches>`

By Averaging out Competency Readiness	`<switches>`
	`<switch for="new-role-readiness-calculation" value="on"/>`
	`</switches>`

   If no switch configuration is added, the system, by default, calculates the role readiness by summing up the number of ready competencies.

3. Save the template and import it into the system.

Results

The system uses the specified calculation option to determine the role readiness.

11.7.3.3 Specifying Competency Rating Source for Role Readiness Calculation

By default, ratings from completed performance review or 360 review forms can be used to determine the current competency rating. However, you can also specify a specific form or a number of forms as the only source of existing ratings.

Prerequisites

You have access to Provisioning.

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

Procedure

1. In Provisioning, go to *Form Template Administration*, and find the ID of the review form templates that you use as the competency rating source.
2. Go to *Manage Plan Template* > *Import/Update/Export Career Worksheet Templates* and export the template.
3. In the template, add the XML definition that includes the source form template IDs. See the following XML configuration sample:

```
<assessment-filters>
    <include-form-ids lang="de_DE">1, 2, 3</include-form-ids>
    <include-form-ids lang="en_US">1,5</include-form-ids>
</assessment-filters>
```

4. Depending on whether you have defined behaviors for competencies, add the corresponding XML switch setting:
   - Behavior readiness NOT considered in calculation or shown in the Career Worksheet `<behaviors hide="true" hide-ratings="true" use-in-readiness="false"/>`
   - Behavior readiness considered in calculation and shown in the Career Worksheet `<behaviors hide="false" hide-ratings="false" use-in-readiness="true"/>`
5. Save the template and import it into the system.

Results

You have configured the Career Worksheet template for the rating source and the system only uses the ratings from the specified forms to calculate an employee's readiness for a future role.

11.7.3.4 Assessment Form for Role Readiness

You can include a link in the Career Worksheet, with which employees, managers, and any other roles who have permission can launch an assessment form for role readiness and rate employees' competencies for a target role.

> → Remember
>
> To configure and use the role readiness form, you must have access to the Performance Management module.

Choosing the link directly opens the form, bypassing usual form creation steps. The default dates are used for the form. The form is configured to auto-populate competencies and include all competencies for the role. As an admin, you can't use proxy to access users' role readiness forms.

The competencies that are available in the role readiness form are the competencies that have been defined in the current sign-in locale. If a competency is defined in English only, and when a user signs in the system with Chinese, the competency isn't available in the form.

> ⓘ Note
>
> By default, the form setting in *Admin Tools* > *Company System and Logo Settings* is *All documents will display their form template name at the time the document was created. This option does not support translations of the document name*. The form title has the following behaviors:
>
> - Includes the target role name.
> - When the form template name is changed in *Admin Tools* > *Form Template Settings* after the form is launched, the form title isn't changed.
> - The form title is always displayed in the language of the logged-in user at the time when the user launched the form.
>
> You can enable *All documents will display their current form template name as configured in the Form Template Administration settings. This option supports translations of the document name*, if you want the form title to behave like the following:
>
> - Doesn't include the role name.
> - When the form template name is changed in *Admin Tools* > *Form Template Settings* after the form is launched, the form title is changed accordingly.
> - If you configure the form template name in logged-in users' language in *Form Template Settings*, the form title is displayed in logged-in users' language.

Once the form is complete, the updated ratings are used in the Career Worksheet. Users can relaunch the form as many times as required. Rules governing the official competency ratings are as follows:

- The latest official rating from any form is the one used in the Career Worksheet.
- Competency ratings aren't differentiated by role (for example: a rating of 5 on Communications applies to both the current role and a target role, if they share that competency).
- Some functions can differentiate ratings by form, including Dashboards, List Views, and People Profile.
- Other functions can't differentiate by form, including Career Worksheet, Talent Search, Side-by-Side Comparison, and Succession Org Chart.

The following form configuration is recommended:

- Do not calculate an overall performance rating with this form.

- Route the form to a manager for a final rating (do not rely on the employee to enter an official rating). The route map should be in the following order: E > EM > Complete
- Exclude this form from Dashboard processes used for current performance reporting.
- Ensure that succession planners understand that this form may provide competency ratings that override the last performance review.
- In *Admin Center* > *Form Template Settings*, don't select *Only create for users who don't have an existing form with an End Date between {date} and {date}*. If the option is selected, when employees launch a form for role readiness assessment, they can't launch another form for current role assessment based on the same form template.

> ⚠ Caution
>
> Alternate configurations may not be supported and should be deployed with extreme care.

11.7.3.5 Enabling Employees to Launch Role Readiness Forms

Configure the Career Worksheet template to allow employees to launch role readiness forms for their target role.

Prerequisites

You have access to Provisioning.

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

Context

Role readiness assessment is form-based, and you need to add the ID of the form template used for role readiness assessment in the Career Worksheet template.

When available, the assessment results are just regarded as another rating source in addition to performance review or 360 review. When employees open the Career Worksheet, the role readiness shown in the worksheet is always calculated based on the latest ratings, be they from assessment forms, performance review, or 360 review.

Procedure

1. In Provisioning, go to *Form Template Administration*, and find the ID of the form template used for role readiness assessment.

2. Go to ▶ *Manage Plan Template* ▶ *Import/Update/Export Career Worksheet Templates* ◀ and export the template.
3. In the template, add the XML definition that includes the form template ID:

```
<self-assessment>
  <each-assessment lang="locale">form template ID</each-assessment>
</self-assessment>
```

> ⓘ Note
>
> You can only specify one form template for role readiness assessment.

4. Save the template and import it into the system.

Results

The *Evaluate Readiness* link appears in the competency section of Career Worksheet. Employees can choose the link to launch role readiness forms.

11.7.4 Suggested Roles

Future roles are automatically suggested to employees based on a set of criteria you can adjust.

The Suggested Roles feature provides a proactive step in employee development by automatically recommending future roles to an employee. The system uses an algorithm to produce the list of suggested roles and calculates a score (**0**-**1**) for the role based on the following criteria:

Criteria	Description	Score	Default Weight
Proximity of role in Career Path		The score is calculated with the formula: If you're using Career Path v2, then the distance between roles in the career path affects the score. The further the role is on the career path from the employee's current role, the lower its assigned score. **1/(distance between the current role and the lead-to role in terms of number of career path nodes)**. For example, the score for the immediate next role along the career path is **1**; the score for the role after the next one is **0.5**.	20%
Competencies associated with the role	The system uses the Career Worksheet readiness calculation to compute a competency match score. The score compares the employee's competency rating with the expected rating for the role.	For example, if the readiness is **40%**, the score is then **0.4**.	40%
Common job family	Roles in the same family as the employee's current role are given a higher score.	The score is determined according to whether a role belongs to the same job family of the employee's current role: • **1**: Same job family • **0**: Different job families	20%

Criteria	Description	Score	Default Weight
Open positions for the role	The algorithm looks at job openings in SAP SuccessFactors Recruiting. If SAP SuccessFactors Recruiting isn't enabled, it looks at open positions in legacy positions from the Succession module. If a job or position is open, the corresponding role gets a higher score. Note This criterion is only available when SAP SuccessFactors Recruiting is enabled or *Position* is selected for *Succession nomination method* in Provisioning.	The score is determined by whether there are open positions for a role: • **1**: with open positions • **0**: no open positions	10%
Popularity of the role within team	The more popular a role is in the employee's team, that is among those employees sharing the same manager, the higher the peer score.	The score is calculated with the formula: **the number of peers who have a particular role as their target role/the number of peers**.	10%

Each of these criteria is then multiplied with the configured weight to calculate a final score for each of the considered roles. The roles are then ranked from the highest score to lowest and displayed on the *Suggested Roles* tab. Users who have the *User Permissions* > *Career Development Planning* > *Career Worksheet Suggested Roles Access Permission* permission can access the tab.

> Note
>
> The algorithm only fetches 60 roles. Any filters applied to the search filter those 60 roles. The display is limited to 4 pages of role cards and is therefore affected by screen size.
>
> The suggested roles are only accessible to the employees themselves. Managers can't view the suggested roles of their direct reports.

11.7.4.1 Configuring Suggested Roles

You can refine and control the algorithm that drives the results of suggested roles in Career Worksheet.

Prerequisites

- You've enabled Career Worksheet V12.
- You have the *Administrator Permissions* > *Manage Career Development* > *Manage Suggested Roles* permission.

Context

You can distribute weights for each set of criteria as well as remove some of the criteria all together.

Procedure

1. In Admin Center, go to *Manage Suggested Roles*.
2. Select which criteria set to enable.
3. Adjust the weight percentages for each of your selected criteria, making sure that the total is equal to 100%.

Next Steps

You can further enable filters to allow users to narrow the list of roles suggested.

11.7.4.2 Enabling Filters for Suggested Roles

Enable filters on the Suggested Roles tab to allow users to narrow the list of roles suggested.

Prerequisites

- You've enabled Career Worksheet V12 and Suggested Roles.
- You have the *Administrator Permissions* > *Manage Career Development* > *Manage Suggested Roles* permission.

Context

To allow users to filter out roles that are not aligned with their career interests, you can introduce the following filters on the *Suggested Roles* tab in Career Worksheet:

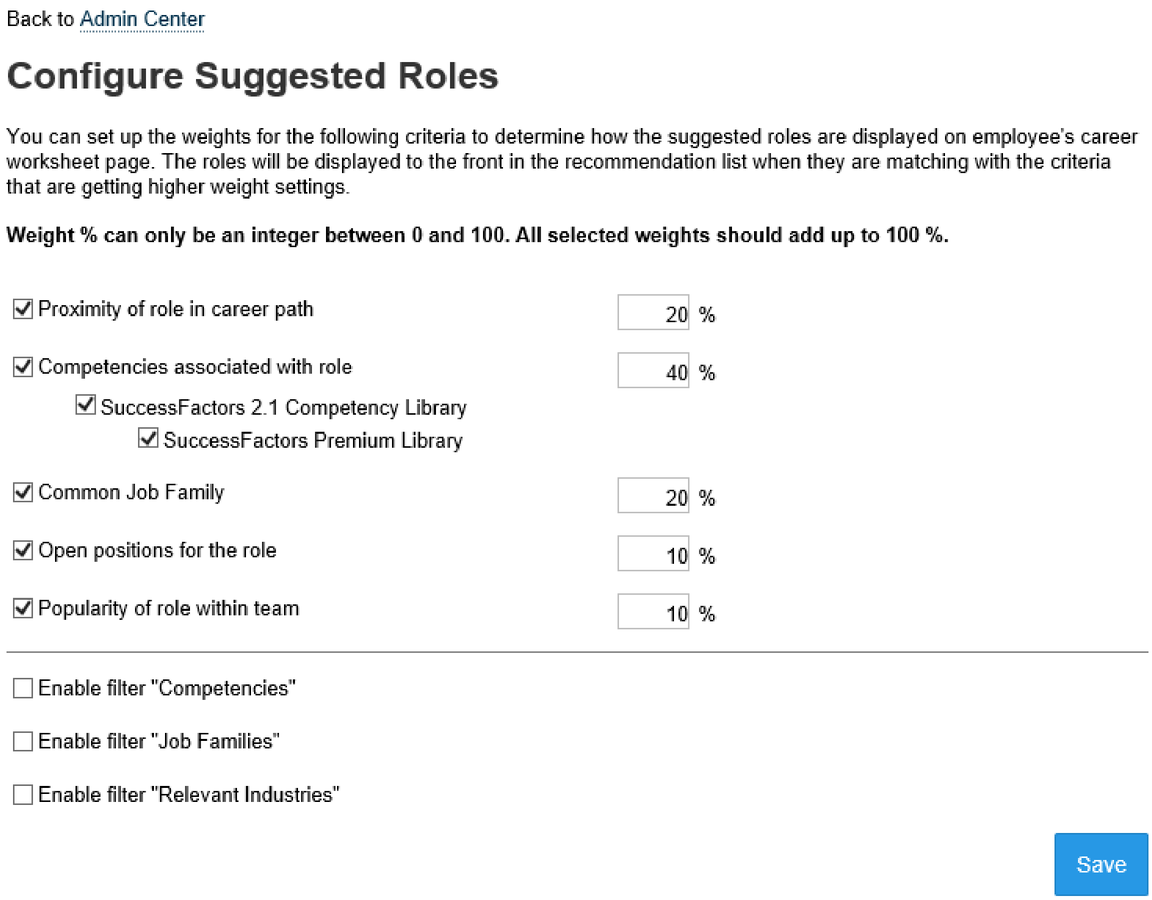
- Competencies
- Job Families
- Relevant Industries

> ⓘ Note
>
> Filtering for relevant industries is only available when you use Job Profile Builder.

The list of suggested roles is determined based on the range of defined algorithm criteria and weighting. With the filters, users can narrow down the suggested roles to those belonging to certain competencies, job families, or industries. Nevertheless, in some circumstances, applying such filters may not influence the content and order of the list. For example, you have adopted one criterion (Job Family) for the algorithm, and the employee can use the Job Families filter to look for roles that belong to the same job family of his or her current role. In such cases, the list of the suggested roles won't change after the filtering.

Procedure

1. In Admin Center, go to *Manage Suggested Roles*.
2. Select which filters to enable.



11.7.5 Links to SAP SuccessFactors Learning

Customers who have SAP SuccessFactors Learning can assign learning activities to their learning management system to-do list in the Career Worksheet page of each target role.

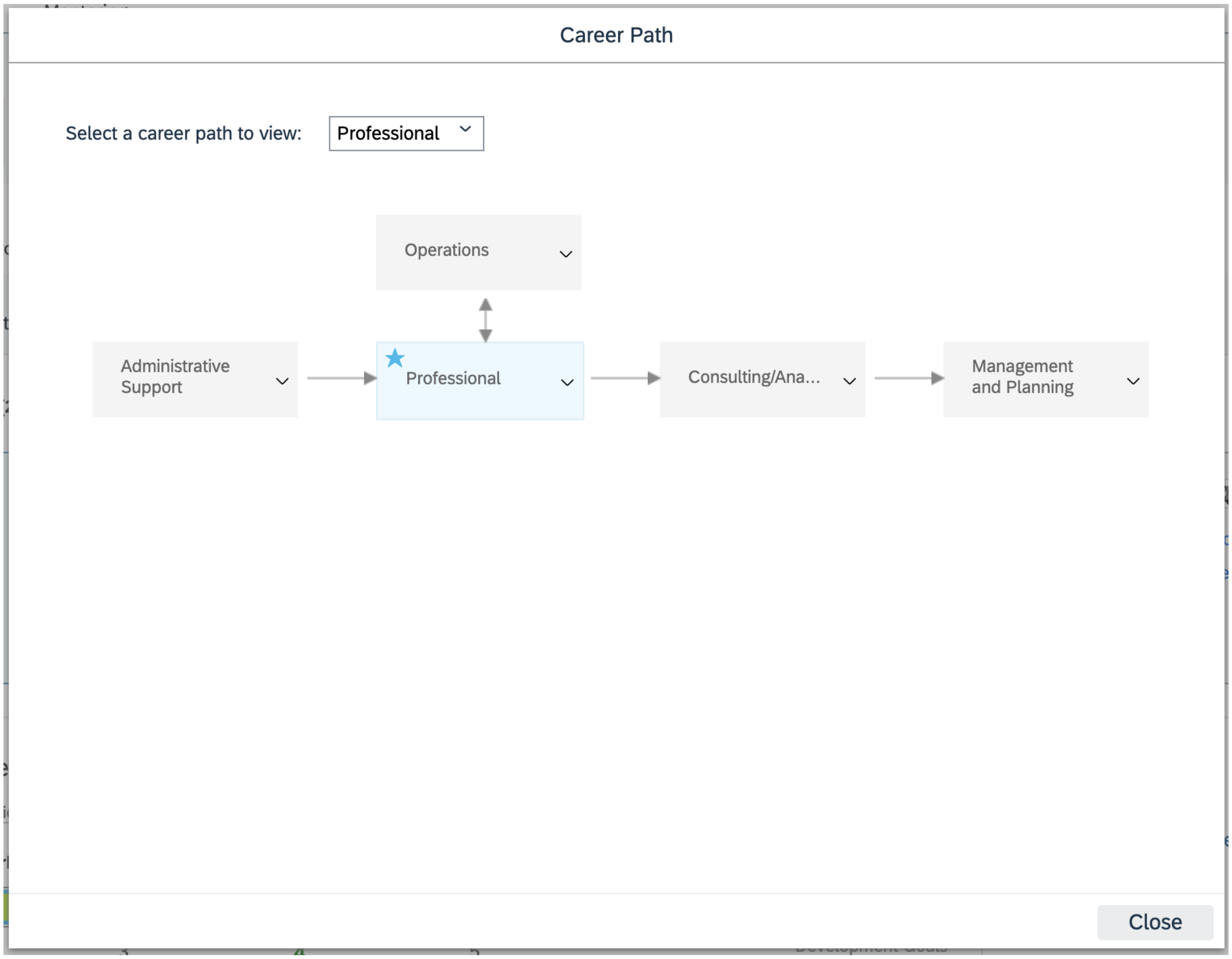
Employees can add learning activities in the Career Worksheet by:

- *Find in catalog*: Locate learning activities directly in the catalog.
- *Search By Competency*: Search for learning activities based on the competencies associated with the target role.

11.7.6 View of Career Path in Career Worksheet

Users can access a graphic view of the different career paths that their current role or target roles could lead them to.

For any role that has a career path defined in the system, users can access the graphical career path view by choosing *View Career Path* in the Career Worksheet. The career path appears in a dialog box, shown as follows.



Users can take the following actions in the career path view:

- Select a related career path to view.
- View the role details by choosing the role.
- Remove the role with a star, which has been added to the Career Worksheet, by choosing *Remove From Career Worksheet* under the dropdown icon.
- Add the role on the career path that interests them to the Career Worksheet by choosing *Add To Career Worksheet* under the dropdown icon.

To use the feature, make sure that *Enable Career Path V2* is selected in Provisioning and users have the *View* permission to any of the following permissions depending on your system:

- If the system uses Job Profile Builder, the permission is *User* > *Miscellaneous Permissions* > *Career Path*.
- If the system uses Job Description Manager, the permission is *User* > *Miscellaneous Permissions* > *Legacy Career Path*.

11.7.7 Configuring Links to Preferred Next Move in People Profile

In the Career Worksheet, you can include the *Show in People Profile* checkbox on each target role for users to select, so they can specify the job role as a career interest in their People Profile.

Prerequisites

You've specified `preferredNextMove` in the `background-element` tag defined in the live profile data model and included `title` in the `data-field` tag defined within that `background-element`.

Example

```
<background-element id="preferredNextMove" type-id="16">
  <label>Preferred Next Move</label>
  <data-field id="title" field-name="vfld1" required="true" max-length="4000">
    <label>Title</label>
  </data-field>
  <data-field id="relocPref" field-name="vfld2" max-length="4000">
    <label>Relocation Preferences</label>
  </data-field>
</background-element>
```

→ Remember

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

Caution

Don't set any fields in the `background-element` to `required="true"`, except for `title`. Otherwise, the Career Worksheet can't add records to the `background-element`, since it's only populating the `title` field.

The fields must have a lowercase letter as the initial letter of the ID. If the first letter of the ID is uppercase, you'll receive an error.

Context

Note that this feature only copies the job role name from the Career Worksheet to the live profile data model. If users enter a job role name directly in People Profile, and the job role is in their Career Worksheet, the checkbox is selected automatically.

Be aware of the following feature differences when you've enabled the latest People Profile:

- Target roles only from the default Career Worksheet template with *Show in People Profile* selected are shown in the Spotlight and Full Profile.

- If the Full Profile is not enabled yet, the *Show in People Profile* checkbox continues to be available in non-default Career Worksheet templates. However, if the Full Profile is enabled, the checkbox is no longer available in non-default templates.

Procedure

1. In the Career Worksheet template, enable the `share` permission for relevant roles.

   In this example, only employees can select the checkbox to show target roles in People Profile.

   ```
   <permission for="share">
     <description><![CDATA[Only the employee may copy roles to their live profile
   page.]]></description>
     <role-name><![CDATA[E]]></role-name>
   </permission>
   ```
2. Grant the roles the *View* permission for the *User Permissions* > *Employee Data* > *Preferred Next Move* permission.

Results

Users with granted permissions can select the *Show in People Profile* checkbox in Career Worksheet.

11.8 Mentoring

Learn how the mentoring features of Succession & Development help you manage your organization's structured mentoring programs.

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

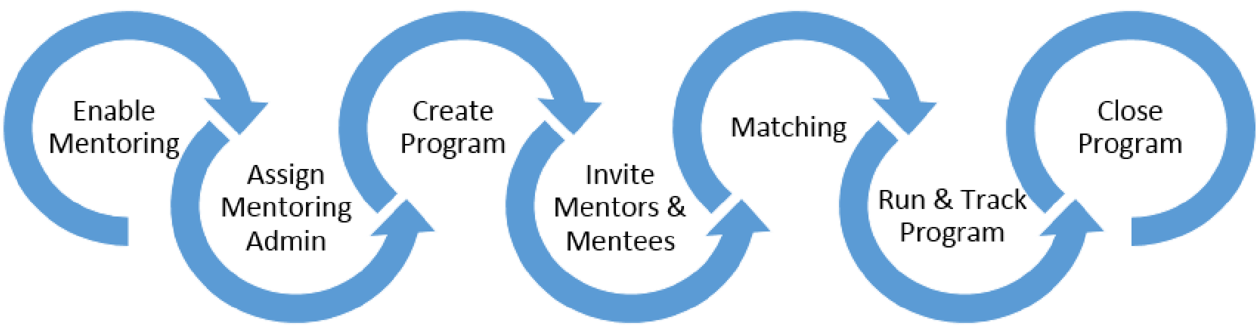
Mentoring typically refers to a development relationship where a more experienced or knowledgeable person provides guidance or coaching to a less experienced person. These relationships can be focused on things like personal growth, specific tasks, or professional development. Formal mentoring or coaching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

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

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

- **Open Enrollment** programs have no defined end date and are not managed by inviting participants but rather by allowing all employees, or a subgroup of employees, to see and sign up freely for a program. Users can sign up as both mentor and mentee in the same program.
- **Supervised** programs require the mentoring administrator to oversee the matching of mentees to mentors through auto-generated and manual matches. Mentoring administrators define program dates, and the program dates strictly follow the program process, for example, mentor sign-up ends as soon as mentee sign-up starts.
- **Unsupervised** programs allow mentees to make direct requests to mentors without administrator intervention. The system still suggests mentors based on the same matching criteria used in the supervised programs but no automatic matching occurs. The system automatically triggers the next step or status based on the program dates defined. Administrators can still push the program to the next step manually if they want to. The program date flexibility also allows mentees to sign up even after mentor sign-up has started.

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



Overview of Mentoring

12 Calibration Alerts

Setting up calibration alert rules can help decision makers avoid any unintentional bias to facilitate fair evaluation of subjects in calibration sessions.

In a calibration session, if the evaluation of a subject triggers a calibration business rule, then alerts are generated to highlight the issue and to suggest a way to mitigate it. It is difficult to eliminate the possibility of an unconscious and unintentional bias toward subjects during a calibration process. Decision makers in the calibration process might have some blind spots that unknowingly cause a bias in their decisions. To mitigate the risk of this bias, you can alert the decision makers about such biases, directly in the system using calibration alerts. For example, calibration alerts can help decision makers conscientiously avert the effect of Leave of Absence on the performance versus potential ratings of an employee. You can help decision makers reconsider the evaluation of employees with high annual ratings but no promotions, or bring their attention to dramatic reduction in performance or potential of an employee in an underrepresented group.

Useful Tips: Points to Remember

- You can use up to three different Performance Management form templates while building a Calibration Alert rule. The inclusion of performance templates in the rule helps you compare the performance review of employees for up to three years.

  > ⚠ Restriction
  >
  > You should not have multiple Performance templates, over different time periods, with the same name. If you use multiple Performance templates that have the same name, the calibration alert rules might not work as expected.

- Ensure that one of the performance templates selected for creating the rule is used for the calibration session in which the rule has been applied, so that the calibration alerts work as expected.

Prerequisites for Calibration Alerts [page 238]
Ensure customers' systems are properly configured to set up Calibration Alerts.

Setting up Calibration Alerts [page 239]
After you ensure that your system configuration supports calibration alerts, the next step is to understand the process of setting up the calibration alerts in your system.

Using Calibration Alerts [page 249]
Use Calibration Alerts to re-evaluate subjects to avoid possible bias in calibration process.

Ad Hoc Reports on Calibration Alerts [page 251]
Ad hoc reports can be used to track the generation of Calibration Alerts.

12.1 Prerequisites for Calibration Alerts

Ensure customers' systems are properly configured to set up Calibration Alerts.

The following checklist helps you understand the system settings required to enable Calibration Alerts:

- You have enabled the *Role-based Permission*, *Enable Generic Objects*, and *Enable the Attachment Manager* options in Provisioning.
- → Remember

  As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Technical Support.
- You have enabled **Employee Central**, **Calibration**, and **MDF** in your instance.
- You have enabled **Intelligent Services** for your instance.
- You have only one performance template used in the calibration template that you want to apply the Calibration alert rules to.

  ⓘ Note

  If you apply calibration alert rules to a calibration template that uses multiple performance templates, then the calibration alert rules do not work as expected.
- Go to *Admin Center* > *Manage Calibration Settings* > *Global Settings*, select *Enable Calibration Alert (Beta)*, and click *Save*. Please note that calibration alerts work only if the Fiori UI for Calibration has been enabled.

  ⓘ Note

  Calibration Alert is a beta feature, and you can test it out in your Preview and Test instances. Please note that it might take some time to enable or disable the Calibration Alerts in the system. We recommend you to the test feature in Test and Preview before enabling it in Production, as rules can have an impact on instance performance.
- You have the following permissions under *Administrator Permissions* > *Metadata Framework*:
  - *Configure Object Definitions*: You need this permission to create rule types and look up tables.
  - *Access To Business Rule Execution Log*: You need this permission to access the log that shows how business rules are executed.
  - *Configure Business Rules*: You need this permission to access the Rules Engine UI.
  - *Manage Data*: You need this permission to create *MessageDefinitions* for alert messages and *Sequence* objects for defining sequences.
    Both *MessageDefinitions* and *Sequence* objects are MDF objects.
  - *Import permission on Metadata Framework*: You need this permission to import and export data for generic objects or business rules using the *Import and Export Data* link in the Admin Center.

    ⓘ Note

    Ensure that you also enable the role-based permissions required to manage calibration templates and sessions.

Parent topic: Calibration Alerts [page 237]

Related Information

Setting up Calibration Alerts [page 239]
Using Calibration Alerts [page 249]
Ad Hoc Reports on Calibration Alerts [page 251]

12.2 Setting up Calibration Alerts

After you ensure that your system configuration supports calibration alerts, the next step is to understand the process of setting up the calibration alerts in your system.

You can set up calibration alerts in your system by following these simple steps:

1. Configuring Calibration Alert Messages in the System [page 240]
   Configure alert messages to describe the nature of the calibration alerts, and to provide a solution to mitigate the alerts.
2. Configuring Calibration Alert Rules in the System [page 241]
   Configure Calibration Alert type business rules that help decision makers in the calibration sessions avoid any unintentional bias during the process.
3. Applying the Calibration Alert rules [page 248]
   Link the business rules for calibration alerts to a calibration template. The rules then apply to all the calibration sessions created from that template.

Parent topic: Calibration Alerts [page 237]

Related Information

Prerequisites for Calibration Alerts [page 238]
Using Calibration Alerts [page 249]
Ad Hoc Reports on Calibration Alerts [page 251]

12.2.1 Configuring Calibration Alert Messages in the System

Configure alert messages to describe the nature of the calibration alerts, and to provide a solution to mitigate the alerts.

Context

Alert messages enable you to explain the reason an alert was triggered, and the action to be taken neutralize the alert. Each calibration alert message is linked to a calibration alert rule that it covers.

Procedure

1. Go to *Admin Center* > *Manage Data*, and in *Create New* field, select *AlertMessage*. A new alert message form appears.
2. In *externalName*, enter a name relevant to the alert message or to the alert rule it covers. For example, "Alert for LOA".

   > Note
   >
   > If you leave *externalName* blank, by default, it picks up the value of *externalCode*.

3. Enter a unique *externalCode*, which is relevant to the message it conveys. For example, if you are creating an alert message for the calibration alert rule for leave of absence, you could use an external code like "Alert_LOA".

   > Note
   >
   > The *externalName* and *externalCode* fields help you search for alert messages in the system. The alert message is represented as "*externalName(externalCode)*", for example, "Alert for LOA(Alert_LOA)".

4. In *effectiveStatus*, select *Active*.
5. In *alertHeaderLocalized* and *alertDescriptionLocalized*, enter a relevant title and a description for the alert message. The header and description field values of the alert message appear on the calibration session as the title of the message and **Recommendations**, respectively.

   For example, the *alertHeaderLocalized* is the title of the calibration alert message that says "Alert for Leave of Absence". The content in *alertDescriptionLocalized* forms the **Recommendations** part, which could be something like:

   "Please check whether leave of absence has caused reduction in the performance rating of the employee."

   > Note
   >
   > Do not use the *alertHeader* and the *alertDescription* fields.

6. Click *Save*. The alert message is ready for use.

Example

The following table shows some sample alert messages that you can use with the "Calibration Alert" rules.

externalName	*externalCode*	*alertHeaderLocalized*	*alertDescriptionLocalized*
Alert for Lack of Promotion	Alert_NoPromotion	Alert for Lack of Promotion	Consider the employee with consistently high performance ratings for promotion.
Alert for LOA	Alert_LOA	Alert for Leave of Absence	Has leave of absence caused reduction in the performance rating of the employee?
Performance Reduction Alert	Alert_PerformanceReduction	Alert for Dramatic Reduction in Performance Rating	Investigate the cause for dramatic reduction in performance rating of the employee for this year, as compared to the previous year.

Task overview: Setting up Calibration Alerts [page 239]

Next task: Configuring Calibration Alert Rules in the System [page 241]

12.2.2 Configuring Calibration Alert Rules in the System

Configure Calibration Alert type business rules that help decision makers in the calibration sessions avoid any unintentional bias during the process.

Context

The Rules Engine helps you create "Calibration Alert" rules that allow you to enforce business logic to the calibration process in your organization. The rules, when linked to a calibration template, generate alerts in the calibration sessions created from that template. You can create multiple "Calibration Alerts" rules in your system.

Procedure

1. Go to *Admin Center* > *Configure Business Rules*, and click *Create New Rule*.
2. Select the *Calibration Alert* scenario.
3. Enter a *Rule Name* relevant to the calibration alert rule you want to create.
4. Enter a *Rule ID*.

   If left blank, by default it is same as the *Rule Name* with the spaces being replaced by underscores ("_").

> ⓘ Note
>
> The *Rule ID* cannot contain blank spaces.

5. Enter a *Start Date* to indicate that the rule is applicable from the given date.
6. Select up to three performance review templates you want to use in the rule, if any, and click *Continue*.

   The inclusion of performance templates in the rule helps you compare the performance review of employees over different time periods. If one of the Performance templates that you select in the rule is same as the Performance template used in the calibration session in which the rule is applied, the calibration alerts work as expected.

   > ⓘ Note
   >
   > You should not have multiple Performance templates, over different time periods, with the same name. If you use multiple Performance templates that have the same name, the calibration alert rules do not work as expected.

7. Use the IF conditions to code your business logic and outline the user actions that trigger the calibration alert.
   - If the rule is to be triggered whenever the user changes the field or the object, select *Always True*.
   - If the rule is to be triggered when the user makes specific changes, enter one or more IF or ELSE IF conditions.

     > → Remember
     >
     > - You can only use the entire set of *Personal Information* and *User ID* in *Job Information* from the *Employee Information* entity in the *IF* condition of the Calibration Alert type business rule.
     > - You cannot use *Alerts* and *Context* in the *IF* condition for the Calibration Alert type business rule.

8. Define how the system should react by defining one or more THEN or ELSE statements, and then click *Save*.

   > → Remember
   >
   > You can only use *Alert Message* in *Alert* for the *Then* condition in the Calibration Alert type business rule.

Results

You have successfully created a business rule.

You can refer to the following sample business rules that can help your organization to avoid bias in the Calibration process.

Use Case 1: Creating Calibration Alert Rule for Lack of Promotion [page 243]
Create a rule that triggers a calibration alert when employees with high performance ratings, over a considerable period like three years, are not considered for promotions.

Use Case 2: Creating Calibration Alert Rule for Leave of Absence [page 245]
Create a rule that triggers a calibration alert when a high performing employee suddenly faces reduction in performance ratings, after taking leave of absence.

Use-Case 3: Creating Calibration Alert Rule for Dramatic Reduction in Performance [page 246]

Create a rule that triggers a calibration alert when a high performing employee faces a dramatic reduction in performance ratings.

Task overview: Setting up Calibration Alerts [page 239]

Previous task: Configuring Calibration Alert Messages in the System [page 240]

Next task: Applying the Calibration Alert rules [page 248]

12.2.2.1 Use Case 1: Creating Calibration Alert Rule for Lack of Promotion

Create a rule that triggers a calibration alert when employees with high performance ratings, over a considerable period like three years, are not considered for promotions.

Procedure

1. Go to *Admin Center* > *Configure Business Rules*, and click *Create New Rule*.
2. Select the *Calibration Alert* scenario.
3. Enter a *Rule Name* that suggests the rule highlights lack of promotion. For example, your rule name can be "Lack of Promotion".
4. Enter a *Rule ID*. By default, it is Lack_of_Promotion.

   > **Note**
   >
   > The *Rule ID* cannot contain blank spaces.

5. Enter a *Start Date* to indicate that the rule is applicable from the given date. For example, it can be **01/01/2014**.
6. Describe the rule. For example, your *Description* could read like: "Rule to detect anyone overlooked for a promotion with high performance ratings over the past 3 years."
7. Select the performance review templates of the current year and the previous two years, and click *Continue*.

   > **Note**
   >
   > You should not have multiple Performance templates, over different time periods, with the same name. If you use multiple Performance templates that have the same name, the calibration alert rules will not work as expected.

8. In the *IF* condition, select the *Has Job Change Event For Period*, *is equal to*, *Boolean*, and set it to *No*.
   a. In *User*, select *Employee Information* > *Job Information* > *User ID*.
   b. In *Start Date*, select *Date*, and in the date box, select the review start date of the oldest performance review template you have selected.

c. In *End Date*, select *Today()*.
d. In *Event Reason*, select *Value*, and in the next dropdown, select *Promotion (TRANPROM)*.

> → Remember
>
> - You can only use the entire set of *Personal Information* and *User ID* in *Job Information* from the *Employee Information* entity in the *IF* condition of the Calibration Alert type business rule.
> - You cannot use *Alerts* and *Context* in the *IF* condition of the Calibration Alert type business rule.

9. Click the dropdown arrow at the top-right corner of the *IF* condition box, select *Add* > *Expression*, and in the *Join Expressions* pop-up window, select *AND* to join the expressions. Repeat this step until you have added three new expressions.
10. In each of the three expressions, add the *[Performance Template]* > *Overall Performance Rating* parameter, followed by selecting =(equals), then select *Decimal*, and in the last text box, enter a high performance rating value, like **5** (on a rating scale of 5, for instance).
11. In the *Then* condition, edit the rule to select the expression *Set*. In the adjoining expression box, select *Alert* > *AlertMessage* > *to be equal to* > *Value*, and in the last dropdown list, select the alert message that communicates the lack of promotion scenario.

> → Remember
>
> You can only use *Alert Message* in *Alert* for the *Then* condition of the Calibration Alert type business rule.

12. Click *Save*.

    You have successfully created the business rule.

Task overview: Configuring Calibration Alert Rules in the System [page 241]

Related Information

Use Case 2: Creating Calibration Alert Rule for Leave of Absence [page 245]
Use-Case 3: Creating Calibration Alert Rule for Dramatic Reduction in Performance [page 246]

12.2.2.2 Use Case 2: Creating Calibration Alert Rule for Leave of Absence

Create a rule that triggers a calibration alert when a high performing employee suddenly faces reduction in performance ratings, after taking leave of absence.

Procedure

1. Go to *Admin Center* > *Configure Business Rules*, and click *Create New Rule*.
2. Select the *Calibration Alert* scenario.
3. Enter a *Rule Name* that suggests the rule highlights lack of promotion. For example, your rule name can be "Leave of Absence".
4. Enter a *Rule ID*. By default, it is Leave_of_Absence.

   > ⓘ Note
   >
   > The *Rule ID* cannot contain blank spaces.

5. Enter a *Start Date* to indicate that the rule is applicable from the given date. For example, it can be **01/01/2016**.
6. Describe the rule. For example, your *Description* could read like: "Rule to detect if any employee performance rating has been reduced after a leave of absence."
7. Select the performance review templates of the current year and the previous year, and click *Continue*.

   > ⓘ Note
   >
   > You should not have multiple Performance templates, over different time periods, with the same name. If you use multiple Performance templates that have the same name, the calibration alert rules will not work as expected.

8. In the *IF* condition, select *Has Absences in Period*, *is equal to*, *Boolean*, and set it to *Yes*.
   a. In *User*, select *Employee Information* > *Job Information* > *User ID*.
   b. In *Start Date*, select *Date*, and in the date box, select the review start date of the performance review template of the previous year.
   c. In *End Date*, select *Today()*.
   d. In *Time Types*, select *Value*, and in the next dropdown, select *Maternity Leave*.

   > → Remember
   >
   > - You can only use the entire set of *Personal Information* and *User ID* in *Job Information* from the *Employee Information* entity in the *IF* condition of the Calibration Alert type business rule.
   > - You cannot use *Alerts* and *Context* in the *IF* condition of the Calibration Alert type business rule.

9. Click the dropdown arrow at the top-right corner of the *IF* condition box, select *Add* > *Expression*, and in the *Join Expressions* pop-up window, select *AND* to join the expressions. Repeat this step until you have added two new expressions.

10. In one of the expressions, add the *[Current Year Performance Template]* > *Overall Performance Rating* parameter, followed by selecting *<=*, then select *Decimal*, and in the last text box, enter a lower performance rating value, like **4** (on a rating scale of 5, for instance).
11. In the other expression, add the *[Previous Year Performance Template]* > *Overall Performance Rating* parameter, followed by selecting *=*, then select *Decimal*, and in the last text box, enter a high performance rating value, like **5** (on a rating scale of 5, for instance).

    The *IF* condition now indicates reduction in performance rating this year, compared to the high performance rating in the previous year, after leave of absence was taken.
12. In the *Then* condition, edit the rule to select the expression *Set*. In the adjoining expression box, select *Alert* > *AlertMessage* > *to be equal to* > *Value*, and in the last dropdown list, select the alert message that communicates the possible impact of leave of absence on the reduction in performance ratings.

    > → Remember
    >
    > You can only use *Alert Message* in *Alert* for the *Then* condition of the Calibration Alert type business rule.
13. Click *Save*.

    You have successfully created the business rule.

Task overview: Configuring Calibration Alert Rules in the System [page 241]

Related Information

Use Case 1: Creating Calibration Alert Rule for Lack of Promotion [page 243]
Use-Case 3: Creating Calibration Alert Rule for Dramatic Reduction in Performance [page 246]

12.2.2.3 Use-Case 3: Creating Calibration Alert Rule for Dramatic Reduction in Performance

Create a rule that triggers a calibration alert when a high performing employee faces a dramatic reduction in performance ratings.

Procedure

1. Go to *Admin Center* > *Configure Business Rules*, and click *Create New Rule*.
2. Select the *Calibration Alert* scenario.
3. Enter a *Rule Name* that suggests the rule highlights lack of promotion. For example, your rule name can be "Dramatic Reduction in Performance".
4. Enter a *Rule ID*. By default, it is Dramatic_Reduction_in_Performance.

> ⓘ Note
>
> The *Rule ID* cannot contain blank spaces.

5. Enter a *Start Date* to indicate that the rule is applicable from the given date. For example, it can be **01/01/2016**.
6. Describe the rule. For example, your *Description* could read like: "Rule to detect if a previous high performer has now been moved down dramatically."
7. Select the performance review templates of the current year and the previous year, and click *Continue*.

> ⓘ Note
>
> You should not have multiple Performance templates, over different time periods, with the same name. If you use multiple Performance templates that have the same name, the calibration alert rules will not work as expected.

8. In the *IF* condition, select the *[Current Year Performance Template]* > *Overall Performance Rating* parameter, followed by *<=*, *Decimal*, and in the last text box, enter a lower performance rating value, like **2** (on a rating scale of 5, for instance).

> → Remember
>
> - You can only use the entire set of *Personal Information* and *User ID* in *Job Information* from the *Employee Information* entity in the *IF* condition of the Calibration Alert type business rule.
> - You cannot use *Alerts* and *Context* in the *IF* condition of the Calibration Alert type business rule.

9. Click the dropdown arrow at the top-right corner of the *IF* condition box, select *Add* > *Expression*, and in the *Join Expressions* pop-up window, select *AND* to join the expressions.
10. Select the *[Previous Year Performance Template]* > *Overall Performance Rating* parameter, followed by selecting *>=*, then select *Decimal*, and in the last text box, enter a high performance rating value, like **4** (on a rating scale of 5, for instance).

    The *IF* condition now indicates dramatic reduction in performance rating this year, compared to the high performance rating in the previous year.
11. In the *Then* condition, edit the rule to select the expression *Set*. In the adjoining expression box, select *Alert* > *AlertMessage* > *to be equal to* > *Value*, and in the last dropdown list, select the alert message that communicates the dramatic reduction in performance.

> → Remember
>
> You can only use *Alert Message* in *Alert* for the *Then* condition of the Calibration Alert type business rule.

12. Click *Save*.

    You have successfully created the business rule.

Task overview: Configuring Calibration Alert Rules in the System [page 241]

Related Information

Use Case 1: Creating Calibration Alert Rule for Lack of Promotion [page 243]
Use Case 2: Creating Calibration Alert Rule for Leave of Absence [page 245]

12.2.3 Applying the Calibration Alert rules

Link the business rules for calibration alerts to a calibration template. The rules then apply to all the calibration sessions created from that template.

Context

The calibration alert rules are applied to the calibration template. You can apply multiple rules to a single template. Ideally, you apply the calibration alert rules before the calibration sessions are created. However, if you already have existing calibration sessions, ensure that you deactivate and reactivate your sessions after applying the rules to the calibration template.

Procedure

1. Go to *Admin Center* > *Manage Calibration Templates*.
2. Select a calibration template, and go to the *Advanced* tab.
3. In the *Rules* dropdown list, select the calibration alert rules that you want to apply.
4. Click *Save*.

   Now, when you create calibration sessions using this template, and then activate the sessions, an asynchronous job for applying the rules to the sessions is triggered. Once the rules have been applied to the session and the job is complete, you get e-mail notification.
5. However, if you already have sessions created before the rules were applied to the template: when you click *Save*, on the confirmation message that appears, click *Yes*.

   > **Note**
   >
   > The confirmation message shows the names of the affected sessions. Remember to deactivate and reactivate the affected sessions.

Results

The calibration alerts are now ready for use.

→ Remember

To ensure that the calibration alert rules are properly applied to the sessions, deactivate, and reactivate the affected calibration sessions each time, when:

- You edit or delete a rule linked to the calibration template.
- You link a new rule, or remove an existing rule from the calibration template.

Next Steps

To deactivate and reactivate the calibration session,

1. Go to *Admin Center* > *Manage Calibration Sessions*.
2. To deactivate the session, select the session, click *Deactivate*, and on the confirmation message, click *Yes*.
3. To reactivate the session, select the *Validation* tab, click *Activate*, and on the confirmation message, click *Yes*.

The job to create the calibration alerts is scheduled immediately after the session is activated.

Task overview: Setting up Calibration Alerts [page 239]

Previous task: Configuring Calibration Alert Rules in the System [page 241]

12.3 Using Calibration Alerts

Use Calibration Alerts to re-evaluate subjects to avoid possible bias in calibration process.

Context

During the calibration process, it may sometimes be difficult to eliminate the possibility of an unconscious and unintentional bias toward subjects during a calibration process. Decision makers in the calibration process might have some blind spots that unknowingly cause a bias in their decisions. To mitigate the risk of this bias, you can alert the decision makers about such biases, directly in the system using calibration alerts. In calibration sessions with calibration alert rules applied to it, whenever the evaluation of a subject triggers a rule, the calibration alerts appear for that subject.

→ Remember

To ensure that the calibration alert rules are properly applied to the session, deactivate, and reactivate a calibration session each time, when:

- You edit or delete a rule linked to the calibration template used for creating the calibration session.
- You link a new rule, or remove an existing rule from the calibration template used for creating the calibration session.

Procedure

1. Go to *Calibration*, and select a session that has calibration alerts applied to it.
2. Start evaluating the subjects, and click *Save*. If your changes are saved without any message, it indicates that the evaluation was successfully done without triggering any calibration alert.
3. If the evaluation triggers any alerts, the *Results from Alerts Regeneration* pop-up message appears. It shows the list of subjects that have been impacted. Click *OK*.
4. On the calibration session view, click each alert icon to understand the reason the alert was generated.
5. To clear the alerts, you can refer to the recommendations provided in the alert messages to update the ratings for the concerned subjects, and click *Save*.

   > Note
   >
   > After you click *Save*, the subjects undergo a re-evaluation for the applied rules. Your updates either clear the alerts, retain the alerts, or add new alerts for the calibration subjects.

6. The *Results from Alerts Regeneration* pop-up message shows the list of subjects for which the alerts were removed or added. If you still have active alerts, repeat the previous step until you clear the significant alerts.

   > Note
   >
   > You can try to clear the alerts based on a "best effort" approach. This means, you may or may not choose to clear all the alerts.

Results

The evaluation of calibration subjects within a session guarded with rules helps the decision makers perform a bias-free calibration.

Task overview: Calibration Alerts [page 237]

Related Information

Prerequisites for Calibration Alerts [page 238]
Setting up Calibration Alerts [page 239]
Ad Hoc Reports on Calibration Alerts [page 251]

12.3.1 Regenerating Calibration Alerts

The *Regenerate Alerts* option enables you to re-evaluate the rules applied to the calibration session, and it regenerates the calibration alerts.

A job for alert regeneration begins, and you can click the *Notifications* icon on the application header to monitor the status of the job.

> **Note**
>
> Regeneration of alerts may need several minutes. Once the “Refresh Alert Completion” notification appears in the Notification area, reload the page and the regenerated alerts appear on the screen.

> **Caution**
>
> Do not edit the Calibration sessions, until the *Notifications* on the application header confirms that the job for regenerating the alerts is complete. If you, or anyone else, updates the session while the regeneration of alerts is in progress, some of the alerts might get corrupted.

12.4 Ad Hoc Reports on Calibration Alerts

Ad hoc reports can be used to track the generation of Calibration Alerts.

You can report on Calibration Alert changes by including the **Audit Data Type** field in the "Calibration" and "Calibration Activity" types of Ad hoc reports.

Create ad hoc reports of definition type "Calibration" or "Calibration Activity", and while selecting columns, select "Audit Data Type" as a field in the report. When you generate the report, the calibration alerts changes appear as "Alert" within the "Audit Data Type" field of the report.

For more information on creating ad hoc reports, refer to the Ad Hoc Report Builder Administration guide.

Parent topic: Calibration Alerts [page 237]

Related Information

Prerequisites for Calibration Alerts [page 238]
Setting up Calibration Alerts [page 239]
Using Calibration Alerts [page 249]

13 Rewarding Employees

Increase gender equity in who gets rewarded.

Research shows that women are paid significantly less than men in every country. To help solve this problem, look at the tools and practices used to determine compensation.

What causes gender bias in compensation?

- Female-dominated occupations pay less than male-dominated occupations.
- Women receive smaller bonuses and pay increases than men, despite having the same performance.
- Women are less likely to negotiate compensation decisions than men.

Use SAP SuccessFactors technology to reduce gender bias in compensation:

- Start new employees off on a fair note by offering equal pay.
- Adjust pay to avoid incidental inequity.
- Link pay to performance criteria and heighten awareness of pay trends associated with gender.
- Base increases on absolute value instead of current pay percentages.
- Encourage employees and managers to have productive discussions about pay.

14 Promoting Employees

Increase gender equity in who gets promoted.

Promotions are the most visible ways for companies to show who and what they value. However, research shows more men are in the top level jobs than women because they received promotions.

What causes gender bias in who gets promoted?

- There is an implicit bias toward doing things the way they've always been done.
- A greater span of control and increased responsibility are not considered to be ideal for people who are perceived to have greater non-work commitments.
- Promotion is an outcome based on other biased processes.
- Leaders tend to promote people they know personally.

Use SAP SuccessFactors technology to reduce gender bias in who gets promoted:

- Use calibration sessions to evaluate potential.
- Search for promotion candidates based on objective criteria.
- Analyze risk of loss for different demographic groups.
- Set gender targets when building candidate slates for leadership roles.

14.1 Requirements for Performance Management Configuration

Certain settings must be configured in Performance Management for Calibration.

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

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

Requirements for Performance Management configuration:

- Route map must have at least one single user or collaborative modify step. Iterative and signature steps are not supported.

> **Note**
>
> When a session is activated, the Performance Management form owner is noted down in Calibration. However, if Calibration is in a collaborative step of the performance review process, when there is manager change and rating change, the information is not updated in Calibration. Because a collaborative step has at least two step owners, it can lead to rating saving issues.

- PM form must have manual ratings configured for the *Performance*, *Potential*, *Overall Objective*, and *Overall Competency* for Calibration to be able to use them.
- Manual ratings allow you to drag and drop users in the session. If the form is configured with only calculated ratings, drag and drop functionality is not usable.
- Section and Field permission settings:
  - If you want to edit the form directly from the calibration session, permissions must be adjusted. If the calibration session users are not directly involved in the route map, they may not have permission to view or edit all the necessary elements.
  - If you have the *Write* permission for in-progress sessions, you can see an option for editing Performance Management form of a subject in the action menu next to the name card of the subject. However, whether you can actually edit the performance rating is further determined by the permission configuration in the Performance Management template.

In addition, the PM form must have one of the following ratings enabled:

Rating Type	Section
Overall objective rating	`objcomp-summary-sect`
Overall competency rating	`objcomp-summary-sect`
performance rating	• `customized-weighted-rating-sect` • `perfpot-summary-sect`
potential rating	`perfpot-summary-sect`

For further information on configuring performance management form templates, see the Performance Management implementation guide.

14.2 Calibration Sessions

Calibration sessions define the set of people who are calibrated and the people who participate in the session.

A calibration session provides a specific holding place for managers and HR business partners (HRBPs) to navigate to change ratings, add comments, and review the outcomes of a given calibration cycle.

SAP SuccessFactors Calibration offers flexibility to accommodate creating sessions based on organizational hierarchy, or any custom set of individuals. Sessions are the combination of the how (template), the when (dates) and the who (Calibration roles).

→ Tip

When you enable the SAP Fiori UI option for Calibration, you might find that the labels and icons on the header section of the calibration session are not clearly visible, as the background color of the header might no longer be in contrast with the color of the labels and icons. To fix this UI issue, go to *Admin Center* > *Theme Manager*, and select the theme you're using. Under *Edit Theme* on the left pane, go to *Fine Tune* > *Placemat*, apply a *Page title color* value that contrasts with the color of the icons and labels, and click *Save*. Mostly, updating the background color of the session header resolves the visibility issue for the calibration session header labels and icons.

Sessions are set up according to your company culture and processes. There's flexibility in who plays what role during the session, what they're allowed to do, and who is the subject of discussion.

ⓘ Note

Do not use special character "{" in calibration session filters. Otherwise, it might cause loading issue. It works fine if you've both "{" and "}" in a filter.

Roles Used in Calibration Sessions

Roles in Calibration are not the same as the roles created for Role-Based Permissions (RBPs), but are specific to and only apply to the calibration session you are configuring. When creating a session, you have control over who plays what role during that session:

- Facilitator: Who is running the session
- Co-facilitator: Who is their backup
- Owner: Who owns the overall session
- Participant: Who is providing input to the subjects
- Subject: Who is being calibrated
- Executive Reviewer: Which HR or business executives should have access to all session data for a given template

You can control the read, write, and finalize permissions for these roles solely in the context of Calibration by using the Manage Calibration Settings tool.

Calibration Session Statuses

Based on different phases of a calibration session life cycle, a calibration session can be in various statuses.

Status	Description
Setup	The session has been created and validated. But the session has not been activated yet.

Status	Description
In Progress	The session has been activated. But the session has not been finalized yet.
Approving	It is a short transitional phase from **In Progress** to **Approved**. After the finalizing process is complete, the status will change to Approved.
Approved	The finalization is complete.
Reopening	It is a short transitional phase from **Approved** to **In Progress**. After the reopening process is complete, the status will change to In Progress.
Deactivated	The *Deactivate* button has been clicked. Only *In Progress* sessions can be deactivated.

14.2.1 Basic Info

Many session details are collected in the *Basic Info* tab when setting up a calibration session.

Basic Info Details

Value	Description	Required
Template	A picklist of the available Calibration templates. Only active templates that the user has permission to create appear here. The session is based on the template selected.	Yes
Session Name	A unique and descriptive name for the session. It is recommended that users consider including as much detail as possible in the name. Consistency across session names is also recommended. It helps in reporting and administration of Calibration.	Yes
Planned Activation Date	The date specified is recorded in the system. The Planned Activation Date must be before the Session Date.	No
Session Date	The start date that the session is held.	No
Location	Optional field if the user wishes to record the physical location of the calibration session.	No

Value	Description	Required
Sessions Owners	Name of the users that are designated as owners of the session. Based on the username and current hierarchy an owner can select session subjects and participants automatically. Participants are users 1 level down from the owner. Subjects are users 2 levels down from the owner.	Yes
Session Facilitators	By default the username of the admin creating the session. You can replace the name or add extra facilitators here.	No
Add Attachment	If enabled, users can see a file that is attached to the session. For example, guidelines or data to help the participants prepare for the session. Note You can view all these documents and download them in *Admin Center* > *Manage Documents*.	No

14.2.2 People

You can add participants and subjects to the session under the *People* tab.

Employees display in your search results can be added as participants, however, only the employees in the target population of your permission role can be added as subjects.

The *Select subjects and participants automatically according to the owners* option is checked by default in the *Basic Info* tab. It means if you designate an owner, the direct reports to the owner are automatically the participants of the calibration session. The direct reports to the participants are the subjects of the calibration session.

If you want to add other people to the calibration session, you can use the *Use Advanced Search* or *Use Org Chart* options. There's no limitation as to how many levels of subjects can be added to the calibration session.

> Note
>
> Calibration supports General Display Name. If you've enabled General Display Name, the *Name* column in the search results table shows employees' display name.

> Note
>
> To have a clearer view, you can:

- hide the top navigation by clicking the arrow icon in the upper right corner.
- hide the right panel by clicking the arrow icon next to it.
- readjust the space of searching and the search results table by moving the vertical bar in between.

Search by Filter

Under the *People* tab, the *Search By Filter* option is selected by default. Here you can filter employees by Division, Department, Location, and Custom filters, or use other identifiers to seek the employees you want to add as participants or subjects. However, if you want to search for employees who have global assignments or concurrent employment, you must enable *Admin Center* > *Manage Calibration Templates* > *Advanced* > *Include inactive users* first.

Search by Group

The *Search By Group* option enables you to search for employees using the permission groups defined in your organization. To access permission groups, go to *Username* > *Options* > *Groups*. You can either use any of the existing permission groups, or create a group, if necessary. The permission groups available on the *Groups* tab of the *Options* page are available in the *Search By Group* option.

Use Org Chart

The administrator can also use the *Org Chart* to search for users. They can search for users and designate them as Participant, Subject, or Not In Session. They can also designate that the entire organization of the user as subjects in the session. If employees are matrix reports in an Org Chart, they can't be added as subjects. However, you can add them as subjects via the Org Chart they display as direct reports at any level.

→ Tip

An on-screen notification has been added to indicate that the target population validation is in effect.

14.2.3 Validation

The *Validation* tab is used to validate whether all requirements for activating the session have been met.

If you have made recent changes, you must click *Save* in order to run the validation. The system verifies whether all requirements have been met. If they have, you can successfully activate the session at this point. If all requirements haven't been met, you may see error messages.

ⓘ Note

The Participant field isn't mandatory. You can leave the participants list empty while creating a calibration session.

Common Error Messages

Error Message	Cause	Resolution
Subjects don't have forms.	You're calibrating Performance forms and a form doesn't exist for the subject.	Create a form for the subject or remove them from the session.
Subjects have forms not yet routed to calibration.	You're calibrating Performance forms and forms haven't been routed to the specified calibration route map step.	Use the Route Forms to Calibration option (if enabled) to push forms to the Calibration step.
Subjects are in another session.	You've enabled the global setting to *Limit Employee to be included in only one calibration session at a time*	Remove the subject from one of the sessions, or change the global setting to allow subjects in multiple sessions.

Common Warning Messages

Warning Message	Cause	Resolution
Subjects have already been selected in other sessions.	You've selected the users as subjects in other sessions that are created using the templates with the same data range and data source.	Use a different template with different data range or data source, or remove the users from the session.
Users are inactive.	The users are in inactive status.	Change the user status to active, or remove the users from the session.

14.2.4 Calibration Session Performance

The Calibration session view can exhibit performance issues when the number of displayed subjects is very large.

Your Technical Support consultant will configure display and filter options to ensure the optimal performance for the Calibration session view.

14.3 Configuring Display Elements Based on the Data Model

Rating elements, display options, and filter options are all based on the configuration of the data model.

→ Remember

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

14.3.1 Rating Elements

The rating elements are available based on the configuration of the data model. Not all rating elements are used for every customer. The configured labels appear in the Calibration template and session.

- sysOverallPerformance
- sysOverallPotential
- sysOverallCompetency
- sysOverallObjective
- sysOverallCustom01
- sysOverallCustom02

> Note
>
> The rating element IDs are case sensitive.

> Sample Code
>
> ```
> <background-element id="sysOverallCustom1" type-id="35" scale-id="Custom1" max-
> entries="50" feedback-type="27">
> ```

Other data can be displayed in the Bin or Matrix Grid view in addition to the rating elements mentioned:

- riskOfLoss
- impactOfLoss
- reasonForLeaving

> Note
>
> If there is only one language enabled in customer's company instance, frequent Matrix Grid rating scale change may lead to rating ID inconsistencies. Thoroughly test reporting with the revised or new matrix rating scale before using it in production instance.

14.3.2 Display Options

Display options can help users focus on just the relevant subject information.

There are several hard-coded fields that always appear in the display options:

- First Name
- Last Name
- Count

If you have enabled the quickcard option in a template, the following display option will also be available:

- QuickCard

Any display option fields that you have defined in the Matrix Grid Classifier tool are also displayed. The Matrix Grid Classifier is a tool that is typically used for SAP SuccessFactors Succession to define the icons for a given field. The icons are then displayed to visually represent certain data elements.

14.3.3 Filter Options

Filter Options can help narrow the number of subjects to be displayed for a calibration session.

Filter Options has a mix of both hard-coded fields, and extra filters that customers can define.

The hard-coded Filter Option fields are as follows:

- Name
- First Name
- Middle Name
- Last Name
- Manager
- Title
- Country
- Level
- Username
- Division
- Department
- Location
- Status
- Email
- Job Code
- Gender
- Risk of Loss
- Impact of Loss
- Reason for Leaving
- New to Position
- Future Leader
- Key Position
- Matrix Managed
- Discussed
- Overall Performance
- Overall Potential
- Overall Competency
- Overall Objective

> Note
>
> *Risk of Loss*, *Impact of Loss*, and *Reason for Leaving* are fields you can enable or disable on the Data tab when you configure a template. If these fields are defined in your data model, regardless of whether or not they are enabled at the template level, they still show up as an entry under *Filter Option*.

> Note
>
> The *Discussed* option is predefined as a default filter that you can use without any configuration.

To add fields to the *Filter Option* list, you must navigate to the *Succession Data Model*. There is a special place for <custom-filters> where various modules define the filter-ability of fields in their module. The <custom-filters> is also where Calibration sets the filter-ability of certain fields.

By using the tag <filter-module id="calibration"> under <custom-filters> in *Succession Data Model*, you can define other custom fields to appear in the *Filter Option* list for your sessions.

```
<custom-filters>
 <filter-module id="calibration">
 <standard-element-ref refid="custom01"/>
 <standard-element-ref refid="custom02"/>
 <standard-element-ref refid="custom03"/>
 <filter-module>
<custom-filters>
```

> ⓘ Note
>
> Filter Option is a global setting and cannot be configured for each Calibration template.

14.3.4 Calibration History Block

The *Calibration History* block can be configured to display in Employee Profile. This block displays up to 5 rating types from calibration sessions. The displayed items are configured in the Calibration template.

When the following code is present in the Succession Data Model, you're able to add the *Calibration History* block to the Employee Profile view.

```
<background-element id="calibrationHistoryPortlet" type-id"138">
   <label>Calibration History Block</label>
</background-element>
```

14.4 Talent Search

Talent Search is a configurable search tool that allows users to find employees based on defined fields and permissions.

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

Initially designed to allow Succession Planners to find successors effectively, Talent Search has grown beyond that and is being used by HR Managers, and Employees. For example, it is often used as a tool for staffing projects, moving people to new jobs, internal recruiting, global assignment, and measuring bench strength.

> ⓘ Note
>
> To be consistent with all other Succession planning pages, the content width for the Talent Search page has been changed to full page. The background color of the page stays unchanged.

14.5 Calibration Views

Calibration provides different user interface views for users to visualize and interact with sessions: Dashboard, List View, Bin View, Matrix Grid View, and Executive Review.

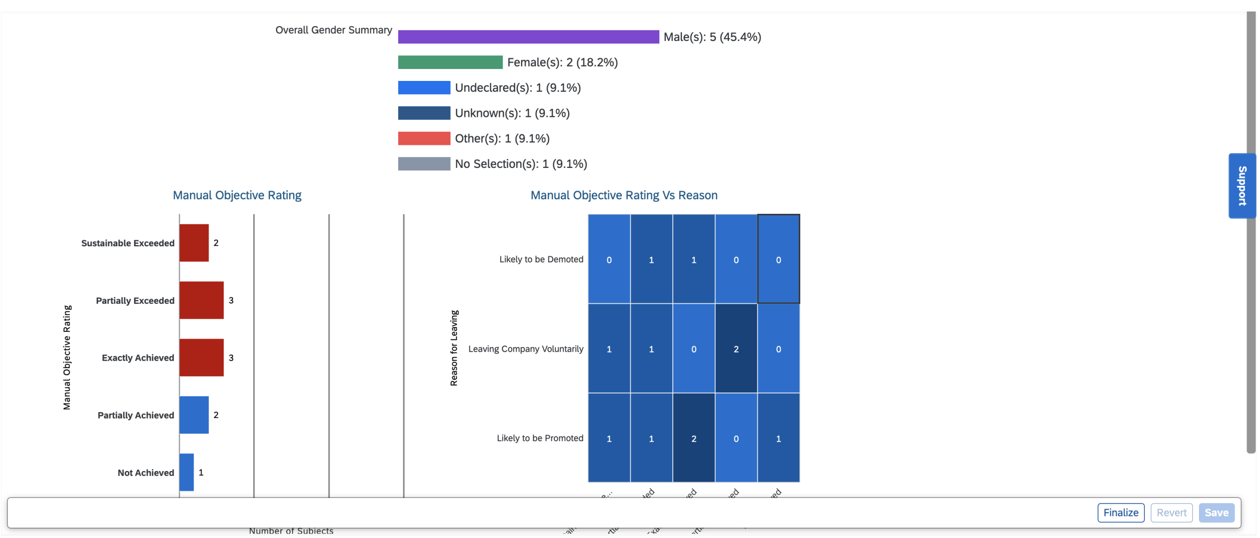
Each view offers different functions. When reviewing a specific session, users can choose and edit subjects in different views. Users' selections of subjects apply to all views. To clear the selections, users can click the *Deselect All* in the *Actions* dropdown menu.

To move business beyond bias, the calibration sessions can be made photoless and can have gender indicators to help the calibrators avoid any unintentional bias towards the calibration subjects. You can select *Enable Gender Indicators* under *Admin Center* > *Manage Calibration Templates* > *Advanced* to show Male and Female gender values. After the setting is complete, users can see gender indicators in different views of a calibration session.

> **Note**
>
> Three additional gender values, Unknown, Undeclared, and Others, are supported now. As a prerequisite, select *Upgrade Now* under *Upgrade Center* > *Optional Upgrades* > *Enhancement to Gender Values – Inclusion of Additional Gender Values* > *Learn More & Upgrade Now*. The indicators for five gender values have been redesigned. For more details, see Field Requirements for the User Data File.

Dashboard View

The Dashboard view provides users with an aggregated view of data in a particular session. The Calibration dashboard is automatically created to summarize the current state of the calibration process.



If any of the following conditions is met, the bar charts in the Dashboard view show the actual distribution for each rating from the rating scale:

- More than one rating is included in a guideline.

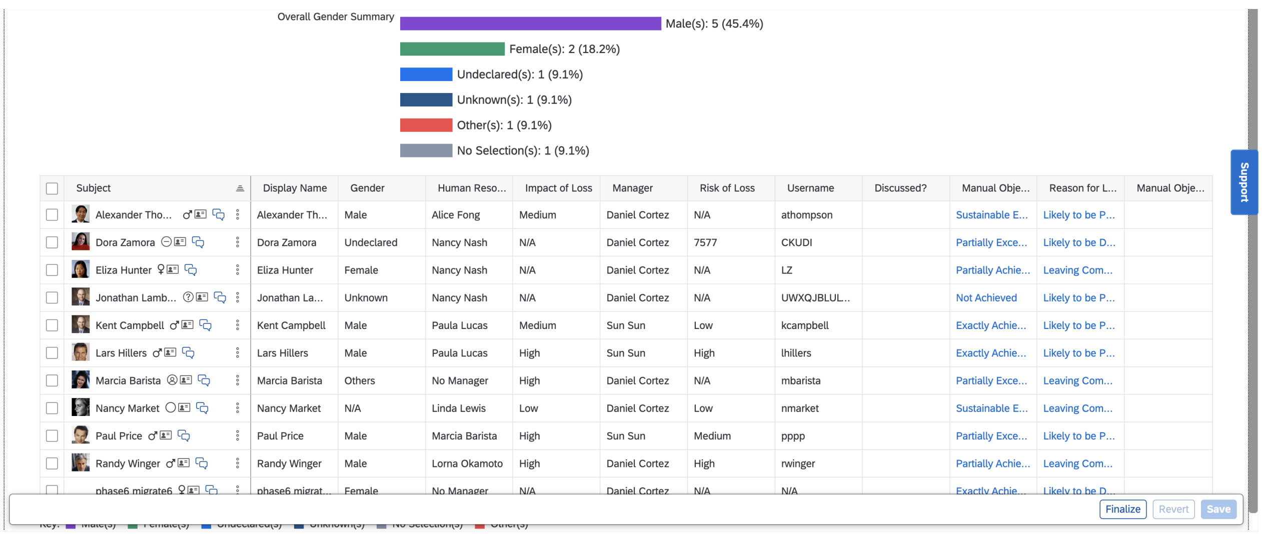
- An operator other than = is configured in a guideline.
- A rating appears more than once in multiple guidelines.
- Not all ratings are configured in all guidelines.

The blue bar indicates that the actual distribution matches the guideline while the orange bar indicates that the actual distribution doesn't match the guideline. When you hover the mouse over a bar, you can compare between the target distribution and the actual distribution. If a group of ratings is configured in a guideline, both the target distribution and the actual distribution refer to the distribution for the group of ratings.

List View

The List view enables users to:

- See a quick tabular view of subjects in a calibration session.
- Quickly select checkboxes to mark off items as already discussed or to access forms, development plans, or personal information.

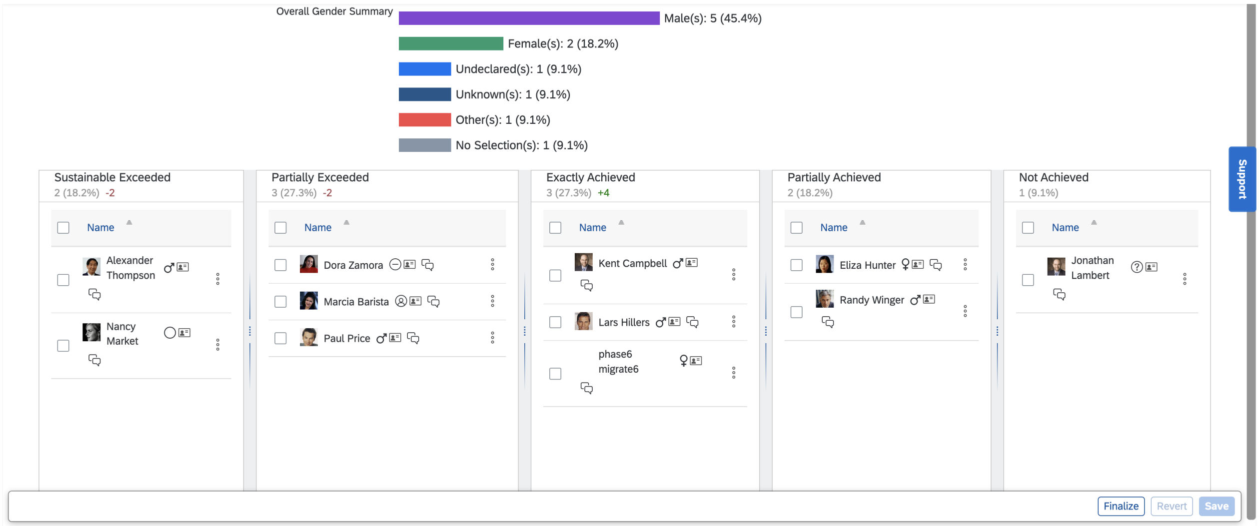


Bin View

The Bin view enables users to:

- Calibrate any ratings from SAP SuccessFactors.
- Drag and drop in the user interface.
- Edit a source form (for example, the Performance Management form).

> ⓘ Note
>
> Users can readjust the width of a bin by using the splitter bar.

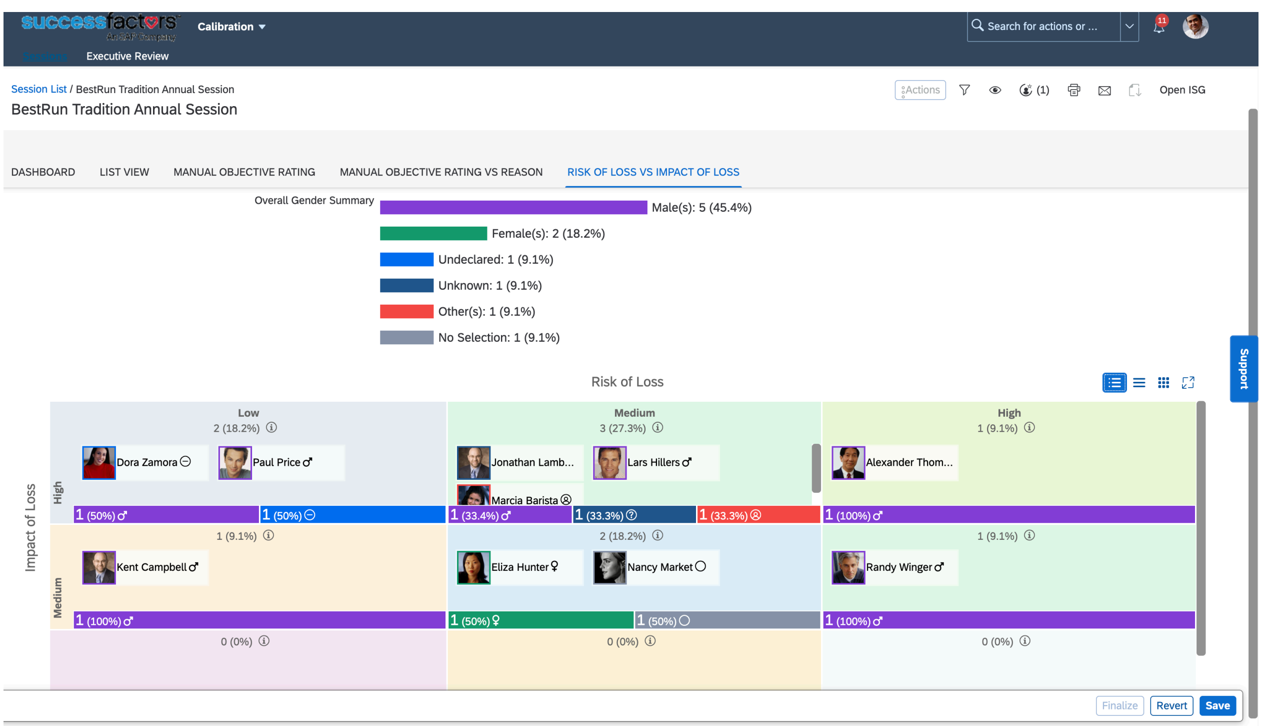


If a guideline includes an individual rating, the numbers in a bin direct you to add or remove subjects per the guidelines in order to comply with the guidelines. If a guideline includes a group of ratings, a warning message shows above the bins how to adjust the total number of subjects for those ratings to meet the guidelines.

Matrix Grid View

The Matrix Grid view enables users to:

- Easily view any two data elements from supported sources.
- Use drag and drop support in the user interface.
- Edit a source form (for example, the Performance Management form).



The Matrix view has multiple views within it that display the names and photos, only names, and only photos of the calibration subjects. The screenshot shows the inline notes used in the Matrix view. All the views within the Matrix view show the gender ratios for each cell.

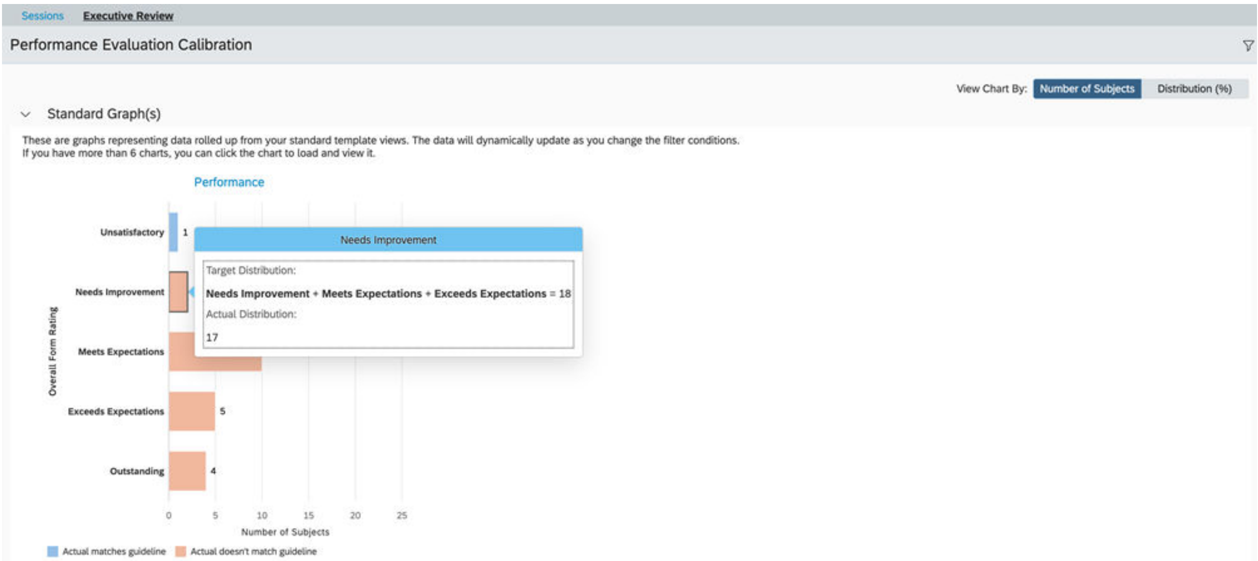
> ⓘ Note
>
> As an effort to move business beyond bias, users can add inline notes to each cell in the Matrix view. Inline notes help the decision makers in a calibration session to have the same understanding of each cell, while calibrating the subjects. Inline notes help in avoiding any unintentional bias, due to difference in perception of the cells in Matrix view. Users can add inline notes while configuring the Matrix view in a calibration template, and the notes appear in the calibration sessions based on that template. Inline notes are available only if the SAP Fiori option for Calibration has been enabled.

Executive Review View

The Executive Review View enables HR and business executives to:

- Easily view aggregated graphs and session details for a given calibration template used in a talent management cycle.
- Drill down to a *Subjects List* page and have a close look at details of employees with the same data, such as ratings.
- Directly edit performance ratings and comments for employees within the view.

The bar charts in the Executive Review view work the same way as those in the Dashboard view.


Sessions
Executive Review
Performance Evaluation Calibration
View Chart By:
Number of Subjects
Distribution (%)
Standard Graph(s)
These are graphs representing data rolled up from your standard template views. The data will dynamically update as you change the filter conditions.
If you have more than 6 charts, you can click the chart to load and view it.
Performance
Unsatisfactory
Needs Improvement
Meets Expectations
Exceeds Expectations
Outstanding
Overall Form Rating
Needs Improvement
Target Distribution:
Needs Improvement + Meets Expectations + Exceeds Expectations = 18
Actual Distribution:
17
Number of Subjects
Actual matches guideline
Actual doesn't match guideline

15 Onboarding Employees

Social and Mobile HCM technology drives Inclusion.

Social and mobile technology create more inclusive organizations that fully leverage the capabilities and needs of a diverse workforce. Organizations must focus on helping employees collaborate with each other after their hire date, and they should create a culture that values diverse perspectives, viewpoints, and ideas.

Barriers to creating an inclusive workforce community:

- Diverse talent can develop restrictive social networks.
- Diverse talent may find it uncomfortable to share ideas.
- Diverse talent may perceive available resources as irrelevant or not helpful.
- Accessibility to technology and location could impede workforce inclusion.

Use SAP SuccessFactors technology to promote inclusion at work:

- Utilize Onboarding to bring new employees into your most important “in-group”: Your company.
- Utilize Jam to drive social collaboration and discussion.
- Utilize Jam to manage your Employee Resource Groups.
- Enable Mobile to ensure everyone has access to HR information on-the-go.

15.1 About Onboarding 1.0 Mobile

This feature in Onboarding 1.0 allows Hiring Managers to provide information to new hires before their first day at the company. This information includes, where to go, what to bring, who they'll meet, and similar details.

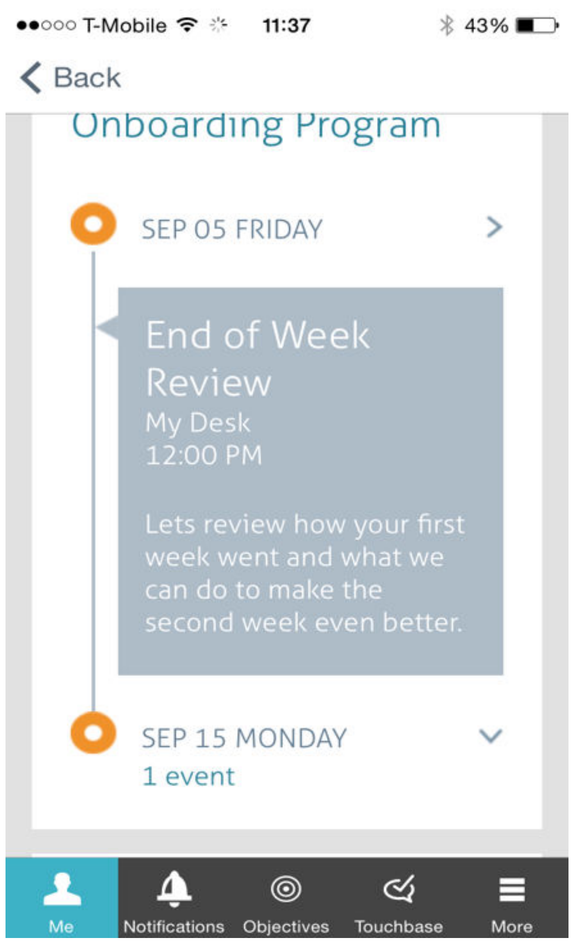
> Note
>
> This is an SAP SuccessFactors Business Beyond Bias feature. Use it to support processes that detect, prevent, or eliminate the influence of bias, helping you achieve your diversity and inclusion goals.

The Onboarding 1.0 Mobile application is shown to a new employee who downloads and accesses the SuccessFactors HCM Mobile app before their start date. The Onboarding 1.0 mobile experience doesn’t require a separate app, just the SuccessFactors HCM application. The Onboarding 1.0 Mobile application provides new hires with a variety of information to alleviate first day anxiety.

ⓘ Note

- If configured, the new hire activities are displayed on a custom card on the new home page. For more information, refer to **Onboarding 1.0 on the Home Page** in the Related Information section.
- The SAP SuccessFactors HCM Mobile app includes only SAP SuccessFactors Onboarding 1.0 mobile experience. Though some of the screens for SAP SuccessFactors Onboarding may be mobile responsive, SAP SuccessFactors Onboarding isn't part of the SAP SuccessFactors Mobile app.

Parts of the Onboarding 1.0 Mobile App

- **First Day Countdown:** Based on the New Hire start date, configured during the onboarding process.
- **Office Locations:**Either based on HR data or configured by the Hiring Manager as part of the Onboarding Program. On the new hire's first day, this will be the location of their first meeting. If the customer is using Employee Central, in the case that the new hire's first meeting is an orientation and the location is somewhere other than their home office, this displays the location of the orientation.
- **Onboarding Program:** The Onboarding Program displays meetings configured for the new hire by their manager and by the HR administrator. 

- **What to Bring (EC integration only):** Configured by the HR administrator using Admin Tools
- **People to Meet:** The hire's Manager, New Hire Buddy and recommended people. In the People to Meet section, a new hire can call, email, or message their new contacts. They can also create a Touchbase item or view their mobile profile by tapping on the photo.

- **My Peers:**Based on the organization chart
- **My Profile:**Based on the new hire's mobile profile

Onboarding 1.0 Mobile Workflow

Before Day 1

Before a new hire's official start date, a countdown to their first day at the company shows in the Onboarding 1.0 Mobile application. They can also see their office location, what items to bring, key meetings and who to meet. In the *People to Meet* feature, the hire can email, call or message key contacts. The Onboarding Program shows the expanded details of the first day's meetings.

Selecting *My Peers* displays the company's organization chart.

Day 1

On the new hire's first day, a welcome message from their manager will display, along with the other information that appeared before their start date. The countdown no longer appears.

After Day 1

The Onboarding Application appears as an option in the mobile app for the hire's first 30 days. After 30 days, the Onboarding option disappears.

If the Onboarding Guide is not showing up in the mobile app for the new hire, check the new hire's start date. The Onboarding guide expires 30 days after the start date and no longer shows up as a notification tile in the mobile app. If the Mobile Onboarding Guide doesn't show some content (Links, What to Bring, and so on), the content comes from different sources. Orientation Meeting and What to bring are only available for customers with Employee Central and can be configured under Onboarding in Admin UI. Links are available on the mobile app only if using the new hiring manager experience.

Troubleshooting

- If the Onboarding Guide is not showing in the mobile app, check the start date of the new hire – the Onboarding guide expires 30 days after the start date and no longer shows as a notification tile in the mobile app.
- If the mobile onboarding guide doesn't show some content (for example, Links, What to Bring, and so on), this may be because the customer's instance doesn't have the required elements for the content. For example, Orientation Meeting and What to Bring are only availalbe for customers with Employee Central. Links are only available on the mobile app if the customer is using the new hiring manager experience.

Related Information

Onboarding 1.0 on the Home Page

15.1.1 Enabling Onboarding 1.0 Features on the Mobile App

To access Onboarding 1.0 on the mobile application, enable the Mobile features from Admin Center and grant the necessary role-based permissions.

Procedure

1. Go to *Admin Center* > *Enable Mobile Features*.

   The *Mobile Settings* page opens.
2. Choose *Modules* on the left panel, and then choose the *Onboarding* checkbox.
3. Grant the following role-based permissions:
   - *User Permissions* > *General User Permissions* > *Mobile Access*
   - *Administrator Permissions* > *Manage On/Offboarding* > *Manage onboarding additional content*

Results

With Onboarding 1.0 features in the mobile application, managers or participants in the onboarding process can use the mobile app to complete the onboarding activities.

15.1.2 Configuring the Onboarding Program on the Onboarding Mobile App

The “Onboarding Program” block of the mobile app for Onboarding 1.0 displays details of the meetings the admin user has configured for New Hires. These meetings are separate from meetings configured in the New Hire Activities by the hiring manager. The Central Orientation Meeting feature is only available with the Employee Central Integration.

Context

> **Note**
>
> Tool: SuccessFactors Onboarding Administration

Procedure

1. Navigate to *Admin Tools* > *Manage Onboarding* > *Maintain Central Orientation Meetings*
2. To create a new Central Orientation Meeting, choose *Create New.*
3. Choose *Edit* in the newly created meeting record.
4. In the pop-up window, specify the effective date for the new meetings, then choose *Proceed*
5. Enter the relevant information about the meeting. The following fields are required: Meeting Date, Meeting Start Time, and Time Zone.
    a. To define the users who must see this meeting, first define a time frame for hires by choosing a date for *Valid for users with a start date on or after* and *Valid for users with a start date on or before.* The start date on or after is the beginning of the defined time frame, and the start date on or before is the end. The meeting appears for new hires with start dates between the two dates.
    b. Once the timeframe is defined, select the office locations where new hires attend this meeting. You can make multiple selections for this element, but the meeting deails (location, description, and so on) remain the same for all selected locations.

16 Change History

Learn about changes to the documentation for Diversity and Inclusion Configuration Guide in recent releases.

2H 2024

Type of Change	Description	More Info
Changed	General Display Name becomes an admin opt-out feature. Related configuration information is thus updated.	Configuring General Display Name [page 137]
Added	The latest and the legacy People Profile display names in the format of General Display Name in different UIs.	Important Notes About General Display Name Adoption [page 138]

1H 2024

Type of Change	Description	More Info
February 29, 2024		
Changed	We've changed the name of the topic "Configuring the Data Model" to "Configuring Display Elements Based on the Data Model". The configuration of the data model has a new seperate page.	Configuring Display Elements Based on the Data Model [page 259]Configuring the Data Model [page 13]

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