SAP SuccessFactors

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Performance & Goals Management in SAP SuccessFactors: Test Script

THE BEST RUN

Content

1 Performance & Goal Management in SAP SuccessFactors

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

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

Goal Management enables employees and managers to align individual goals with company business goals and helps organizations ensure that all employees are aligned and working on the right things. The Goal Management process shows the new UI obtained by enabling **Latest Goal Management** in Upgrade Center.

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

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

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

2 Prerequisites

This section summarizes all the prerequisites for conducting the test in terms of systems, users, master data, organizational data, other test data and business conditions.

2.1 System Access and Roles

System	Details
System	Accessible via SAP Fiori launchpad. Your system administrator provides you with the URL to access the various apps assigned to your role.

The test is conducted in the following systems:

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

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

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

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

2.2 Business Conditions

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

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

2.3 Preliminary Steps

2.3.1 Preliminary Steps for Goal Management

2.3.1.1 Create Goal Plan Template

Purpose

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

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Talent Administrator**.	The *Home* page is displayed.	
2.	**Access Admin Center**	Choose *Home* > *Admin Center* from the menu in the top left corner.	The *Admin Center* screen is displayed.	
3.	**Access Goal Plan Template**	Type `Manage Templates` in the tool search box within the *Tools* card and select the feature/tool from the list. Then choose the *Goal Plan* tab.	The *Manage Templates* screen is displayed, containing a list of existing goal plan templates.	
4.	**Copy Goal Plan Template**	From the list of goal templates, choose the *Goal Plan* link. On the upcoming screen, choose *General Settings* in the left side column of the screen. Adjust the *Start Date* and *End Date* if necessary, then choose the *Save As* icon.	The goal plan template for the current year has been created.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	**Adapt Name of Copied Goal Plan**	Enter the name of the copied plan to reflect the current year, for example `<year> Goal Plan`. When done, choose *Save*. Then, choose in your newly copied goal plan template screen again *General Settings* in the left side column of the screen. Select from the *Change Language* dropdown list your current system language. Then change the name again and choose *Save*.		

Result

The Talent Administrator communicates the guidelines to the managers and reminds them of the process start.

Process Goal Management [page 18] is now ready to start.

2.3.2 Preliminary Steps for Performance Management

2.3.2.1 Create Performance Review Template

Purpose

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

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Talent Administrator**.	The *Home* page is displayed.	
2.	**Access Admin Center**	Choose *Home* › *Admin Center* from the menu in the top left corner.	The *Admin Center* screen is displayed.	
3.	**Access Performance Review Template**	Type **`Manage Templates`** in the tool search box within the *Tools* card and select the feature/tool from the list. Then choose the *Performance Review* tab.	The *Manage Template* screen is displayed, containing a list of existing performance and development plan templates.	
4.	**Copy Performance Review Template**	From the list of performance review templates, choose the *Performance Review* link and choose the *Save As* icon.	The performance review template has been copied.	
5.	**Adapt Name of Copied Template**	Enter the name of the copied plan to reflect the current year, for example **`<year> Performance Review`**. When done, choose *Save*.		
6.	**Adapt Route Map and Rating Scale**	Choose *General Settings* in the left side column of the screen, and modify the route map and rating scale, if appropriate: *Route Map*: select the appropriate workflow for the Performance review. *Rating Scale*: select the scale of ratings from the dropdown list. If no change is necessary, you can keep as is.		

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
7.	**Choose Goal Plan Template**	Choose *Edit Fields and Sections* in the left side column of the screen and navigate to the Goals section. In the *Section type* part, the *Goal Section* radio button is checked by default. Select from the *Choose which goal plan you want to link* dropdown the goal plan template you want to link with this performance template. **Note** The selected goal plan template has to be the one prepared in preliminary step Create Goal Plan Template [page 7]. Choose *Save* to save your changes.	The goal plan template to which the performance review template is linked has been chosen.	

2.3.2.2 Create Calibration Template

Purpose

The Talent Administrator, in preparation for the current year's calibration process, creates the performance management calibration template. For this purpose, the previous year's calibration template is copied and renamed to the current year. Then the calibration settings, like review period, data source and views design, are updated if needed.

Procedure

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	Access Manage Calibration Templates	Type **`Manage Calibration Templates`** in the tool search box within the *Tools* card and select the feature/tool from the list.	The *Manage Calibration Templates* screen is displayed.	
4.	Clone Calibration Template	On the *Manage Calibration Template* screen, choose the *Clone Template* icon next to the *Performance Calibration* template. On the upcoming screen make following entries: On the *Basic Info* tab: • *Template Name*: **`Performance Calibration - <Plan Year>`** • *Review Period*: **`1st January of <plan year> - 31st December of <plan year>`** On the *Data* tab: Flag the *Performance* checkbox and make following entries: • *Template*: select <year> Performance Review from the dropdown list • *At which routing step can the data be used?*: select **`Calibration`** from the dropdown list • Adjust the elements and the corresponding distribution guidelines accordingly, if necessary. On the *Views* tab: Choose the tab for the existing view; adjust the *Calibration Elements* for X-axis and Y-axis, as well as other settings like *View Name*, if necessary, for example **`Overall Performance Rating`**. Choose *Save*. Choose *Back to Template List*.	The calibration template is prepared for the current performance management cycle.	

Result

Process Performance Management [page 61] is now ready to start.

2.3.3 Preliminary Steps for 360 Degree Review

2.3.3.1 Map Job Code with Job Role

Purpose

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

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Talent Administrator**.	The *Home* page is displayed.	
2.	**Access Admin Center**	Choose *Home* > *Admin Center* from the menu in the top left corner.	The *Admin Center* screen is displayed.	
3.	**Access Manage Job Profile Content**	Type **`Manage Job Profile Content`** in the tool search box within the *Tools* card and select the feature/tool from the list. On the upcoming *Manage Job Profile Content* screen, select from the *Select Content Type ...* dropdown list *Set Up Families and Roles*.	The *Families* tab within the *Manage Job Profile Content* screen is displayed.	
4.	**Choose Role**	Choose the *Roles* tab and choose the name link of the appropriate role.		

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	**Map Job Code**	On the *Edit: Role* page, stay on the *Mapped Job Codes* tab and choose *Map Job Codes*. In the upcoming *Add Job Code* dialog box, enter the first several letters of the job code you want to map until you see a dropdown list. Then select the appropriate job code from this list. Choose *Save*.	The job code has been mapped with the job role.	

2.4 Activate SAP SuccessFactors Mobile Application (Optional)

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

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

1. Download and install the *SAP SuccessFactors Mobile App* in your mobile device (from App Store).
2. The user, who needs to execute the process steps on the mobile, logs in to the SAP SuccessFactors website.
3. Choose the dropdown menu and select *Options*.
4. On the *Options* screen, select *Mobile*.
5. Select the *Activate via Camera* option.
6. The camera is activated, and you have 30 seconds to scan the displayed QR Code.
7. Open the *SAP SuccessFactors Mobile App* on your mobile device.
8. Tap the *Add Profile* box and tap *Scan QR Code*, scan the QR Code displayed in your SAP SuccessFactors website.
9. If the QR Code expires, choose *Get New Code* to generate a new QR Code.
10. Once the QR Code is validated, the User License screen appears on your mobile device. Read the *End User License Agreement (EULA)* and make the appropriate selections on the mobile device to accept the *User License Agreement*.
11. The SAP SuccessFactors mobile application is now activated. The corresponding user profile is added. For testing purpose, you can use one mobile device for different business roles involved in the Goal Management process. To realize this, repeat the steps listed above using different users, such that you then can get all user profiles prepared in your SAP SuccessFactors Mobile App.

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

- Manager
- Employee

3 Overview Table

The business process **Performance & Goals Management in SAP SuccessFactors** consists of several process steps provided in the table below:

Process Step	Business Role	Transaction	Expected Results
Goal Management [page 18]			
Establish Goals for Self and Team [page 18]	Manager	Company Instance URL/ Mobile App	Goals have been created by the manager for him- or herself and for the direct reports.
Review Goal Plan and Add Individual Goals [page 25]	Employee	Company Instance URL/ Mobile App	The goal plan has been reviewed and possibly updated by the employee.
Update Goal Plan [page 29]	Employee	Company Instance URL/ Mobile App	After communication with the manager, the goal plan has been updated by the employee.
Continuous Performance Management [page 31]			
Maintain Activities [page 32]	Employee	Company Instance URL/ Mobile App	Activities have been created or updated by the employee to keep track of the items he or she is working on.
Maintain Employee Activities [page 36]	Manager	Company Instance URL/ Mobile App	Activities for a direct report have been maintained.
Request Feedback on Activities [page 39]	Employee	Company Instance URL/ Mobile App	The employee has requested feedback on their activities from other employees within the organization.
Provide Feedback on Activities [page 42]	Stakeholder (any Employee in the organization)	Company Instance URL/ Mobile App	The stakeholder has provided feedback on the employee's activities.
View Feedback on Activities [page 45]	Employee	Company Instance URL/ Mobile App	The feedback provided by the stakeholder has been viewed by the requesting employee.
Prepare 1:1 Meeting [page 48]	Employee / Manager	Company Instance URL/ Mobile App	Topics for the next 1:1 meeting have been added.

Process Step	Business Role	Transaction	Expected Results
Conduct 1:1 Meeting (Process Step Outside Software) [page 51]	Manager / Employee	Outside Software	The 1:1 meeting between employee and manager has taken place.
Capture 1:1 Meeting [page 52]	Employee	Company Instance URL/ Mobile App	Topics, which have been discussed during the 1:1 meeting, have been confirmed. The 1:1 meeting has been archived in the system.
Maintain Achievements [page 54]	Employee	Company Instance URL/ Mobile App	The achievements have been captured in real-time by the employee.
Maintain Employee Achievements [page 57]	Manager	Company Instance URL/ Mobile App	Achievements of a direct report have been reviewed.
Update Goal Plan (Optional) [page 60]	Employee	Company Instance URL	Possible updates in the employee's goal plan have been performed.
Performance Management [page 61]			
Launch Performance Review Forms [page 61]	Talent Administrator	Company Instance URL	The performance review forms are launched for employees in the organization.
Request Performance Feedback (Optional) [page 63]	Manager	Company Instance URL	The manager has asked raters to give feedback on the employee's performance.
Provide Feedback on Employee Performance (Optional) (Process Step Outside Software) [page 64]	Rater	Outside Software	The raters have given feedback via email.
Review Feedback on Employee Performance (Optional) [page 65]	Manager	Company Instance URL	The manager has reviewed the feedback from raters.
Perform Self-Assessment [page 66]	Employee	Company Instance URL	The employee has performed the self-assessment of his or her performance.
Rate and Compare Employees Competencies (Optional) [page 67]	Manager	Company Instance URL	The manager has compared and rated in one page the competencies of all direct reports.
Perform Employee Review [page 69]	Manager	Company Instance URL	The manager has rated the employee's performance.
Plan Calibration Session [page 71]	Talent Administrator	Company Instance URL	The calibration session has been created.

Process Step	Business Role	Transaction	Expected Results
Conduct Performance Calibration [page 74]	HR Business Partner	Company Instance URL	The employee's performance has been calibrated.
Finalize Performance Review [page 76]	Manager	Company Instance URL	The year-end review of the employee has been finalized.
Discuss Year-End Performance Review (Process Step Outside Software) [page 78]	Manager / Employee&	Outside Software	The performance review meeting between manager and employee has taken place.
Sign Off Year-End Review [page 79]	Employee	Company Instance URL	The employee has signed the performance review form.
Sign Off Employee Year-End Review [page 80]	Manager	Company Instance URL	The manager has signed employee's performance review form.
360 Degree Review (Optional) [page 82]			
Create 360 Degree Review Form for Self [page 82]	Employee	Company Instance URL	The employee has created the 360 degree review form for him- or herself.
Review and Modify Rater List [page 83]	Employee	Company Instance URL	Raters to evaluate the 360 degree review form have been nominated by the employee.
Review Employee Rater List [page 86]	Manager	Company Instance URL	The rater list has been approved by the employee's line manager. The form has been sent out to the raters for providing feedback.
Perform 360 Degree Review [page 89]	Rater	Company Instance URL	The 360 degree review form has been evaluated by all raters.
Review "Detailed 360 Degree Report" [page 91]	Employee / Manager	Company Instance URL	The detailed 360 degree report has been reviewed by the employee and his/her manager.

4 Test Procedures

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

4.1 Goal Management

Purpose

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

The process steps to achieve this are detailed below.

4.1.1 Establish Goals for Self and Team

Purpose

The Manager creates goals for themselves and for the direct reports. For the direct reports, goals can be created directly in their goal plans, or cascaded from the goals of the manager.

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

These options are detailed below.

4.1.1.1 Establish Goals for Self and Team on Company Website

Purpose

The Manager creates goals for themselves and for the direct reports. One option for creating goals for direct reports is to cascade these from the own goals.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Manager**.	The *Home* page is displayed.	
2.	**Access Goals module**	Choose *Home* > *Goals* from the menu in the top left corner.	The *Goals* screen is displayed. It is divided in two parts: • In the *People Selector* on the left of the screen, your name, and the names of your manager and your direct reports are listed. • In the right part of the screen, you can select the appropriate goal plan.	
3.	**Select Goal Plan**	Choose the *Expand or collapse goal plan details (arrow-down)* icon next to the goal plan name displayed as default in the right part of the screen. The *Select Goal Plan* quick card expands. Choose the appropriate **`<New copied goal plan>`** (for example **`<year> Goal Plan>)`** from the list.	The *<year> Goal Plan* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Add New Goals**	In the upper right corner of the screen, choose *Create Goal*. From the dropdown menu that expands, you have the option to select either *Create New*, or *Create from Library*, or *Copy from Goal Plan*. You can opt to execute all or only some of these options, as described below.	New goals have been created. You return to the *<year> Goal Plan* screen.	

		If you select *Create New*, the *Create Performance Goal* page is displayed, in which the mandatory fields are marked accordingly. Make following entries:
		
		`<Goal Name>`
		
		`<Category>`
		
		`<Metric/Target>`
		
		`<Weight>`
		
		`<Start>`
		
		`<Due>`
		
		`<Status>`.
		
		Choose *Save*.		

		If you select *Create from Library*, the *Create from Library* dialog box displays. In the *1. Select Goals* section, expand the categories by choosing the arrow in front of it. Flag one or more goal check boxes and choose *Next*. In the upcoming *2. Edit Goals* section, make changes to the selected goals as needed. For this, choose the *Pencil* icon. Then choose *Next*. In the upcoming *3. Create* section, choose *Save*.		

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
		If you select *Copy from Goal Plan, the Copy from Goal Plan* dialog box displays. In the *1. Select Goals* section, select the appropriate goal plan from the *Goal Plan* dropdown. Flag one or more goal check boxes and choose *Next*. In the upcoming *2. Edit Goals* section, make changes to the selected goals as needed. Then choose *Next*. In the upcoming *3. Copy* section, choose *Copy*.		
5.	**Cascade Goals to Employee**	In the upper right corner of the screen, choose *Cascade Goals*. The *Cascade Goals* dialog box displays. In the *1. Select Goals* section, flag one or more goal check boxes and choose *Next*. In the upcoming *2. Select Recipients* section, you can se-lect recipients from your team or via search. Stay on the *From My Team* tab and flag one or more *Direct Reports*. To search for other recipients, you can make use of the *Via Search* tab. Then choose *Next*. In the upcoming *3. Edit Goals* section, you can modify the goals, if needed. Then choose *Next*. In the upcoming *4. Cascade* sec-tion, choose *Cascade*. A system message is displayed informing that the goals have been cascaded successfully. Choose *OK*. You return to your *<year> Goal Plan* screen.	The goal has been cascaded to the employees.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
6..	**Edit Goal for Employee (Optional)**	You can edit an existing goal for an employee. For this, choose in the *People Selector* part on the left of the screen the employee. The employee's goal plan displays in the left side of the screen. The just cascaded goal and other existing goals, if any, are displayed. **Note** In case there are several goal plans available for the employee, you need to choose the *Expand or collapse goal plan details (arrow-down)* icon next to the goal plan name displayed as default in the right part of the screen. From the *Select Goal Plan*quick card, which expands, choose the appropriate **<year> Goal Plan>**. Choose the *More Actions (...)* icon next to the goal's name and from the expanded dropdown menu, select *Edit Goal*. In the upcoming *Edit Performance Goal* page, modify the goal as required. When done, choose *Save*.	The employee's goal has been updated.	
7.	**Delete Goal for Employee (Optional)**	In case you need to delete a goal of an employee, choose the *More Actions (...)* icon next to the goal's name and from the expanded dropdown menu, select *Delete Goal*. In the upcoming dialog box, the message *Are you sure you want to delete this goal?* is displayed. Choose *OK*.	The employee's goal has been deleted.	

Result

After the manager has created goals for himself or herself and for the team, he or she might schedule meetings with the employees to discuss their goals setting. The employees receive email notifications with invitation to review the goal plan they have received.

4.1.1.2 Establish Goals for Self and Team via Mobile Device (Optional)

Purpose

The Manager creates goals for themselves and for the direct reports.

If the mobile application is not enabled, this option is not available and only the procedure described in Establish Goals for Self and Team on Company Website [page 19] can be executed.

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

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the **SAP SuccessFactors** mobile app and log on as **Manager** by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2.	**Access Goals and Select Goal Template**	In the *My Activities* tile, scroll down and tap *Goals* and choose goal plan by tapping *Goal Plan* to choose which goal plan you want to use (for example **`<year> Goal Plan>`**). Tap *Done*.	The *<year> Goal Plan* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Add New Goals**	Tap *Add Goal*. On the upcoming screen, the mandatory fields are marked accordingly. Make following entries: **`<Category>, <Goal Name>, <Metric>, <Weight>, <Status>, <Start>`** and **`<Due>.`** Tap *Done*.	A new goal has been created. You return to the *<year> Goal Plan* screen.	
4.	**Add New Goals for Employees**	Go to the *Team* tab and tap the direct report for whom you want to add goal for. On the **`<employee name>`** page, scroll down and tap Goals and choose goal plan by taping Goal Plan to choose which goal plan you want to use (for example **`<year> Goal Plan>`**). Tap *Done*. To create a new goal, proceed as described in process test step # 3.	A new goal has been created. You return to the *<year> Goal Plan* screen.	
5.	**Edit Goal for Employee (Optional)**	Choose the goal which you want to edit. Tap *Edit* at the upper right corner and change the content for your goal then tap *Done*. You can also maintain comments to the goals for you or your subordinates by tapping *Add Comments*. After maintaining the comments tap *Done*.	An employee's goal has been updated.	
6.	**Delete Goal for Employee (Optional)**	In case you need to delete a personal goal, choose the goal which you want to delete. Tap *Delete Goal* at the bottom of the *Goal Detail* page. And choose *Delete* to confirm.	An employee's goal has been deleted.	

Result

After the manager has created goals for himself or herself and for the team, he or she might schedule meetings with the employees to discuss their goals setting. The employees receive email notifications with invitation to review the goal plan they have received.

4.1.2 Review Goal Plan and Add Individual Goals

Purpose

The Employee maintains goals in the own goal plan. This includes adaptions of the goals created by the manager, as well as adding own goals.

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

4.1.2.1 Review Goal Plan and Add Individual Goals on Company Website

Purpose

The Employee reviews the goals maintained by the manager for them and possibly adapts these. This includes editing and possibly deleting goals. In addition, the employee can create own individual goals.

Procedure

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Select Goal Plan**	Choose the *Expand or collapse goal plan details (arrow-down)* icon next to the goal plan name displayed as default in the right part of the screen. The *Select Goal Plan* quick card expands. Choose the appropriate **`<New copied goal plan>`** (for example <**`year> Goal Plan>)`** from the list.	The *<year> Goal Plan* screen is displayed.	
4.	**Add New Goals**	To create a new goal, proceed as described in process step Establish Goals for Self and Team on Company Website [page 19] , test step # 4.	A new goal has been created. You return to the *<year> Goal Plan* screen.	
5.	**Maintain Existing Goal**	To edit an existing goal, choose the *More Actions (...)* icon next to the goal's name and from the expanded dropdown menu, select *Edit Goal*. In the upcoming *Edit Performance Goal* page, modify the goal as required. When done, choose *Save*. **i Note** If you have direct reports, you can cascade goals further down; for details see process step Set and Cascade Goals on Company Website Establish Goals for Self and Team on Company Website [page 19] , test step # 5. You can also maintain *Comments* to the goals for you or your direct reports.	The goal has been maintained.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
6.	**Delete Existing Personal Goal (Optional)**	In case you need to delete a personal goal, choose the *More Actions (...)* icon next to the goal's name and from the expanded dropdown menu, select *Delete Goal*. In the upcoming dialog box, the message *Are you sure you want to delete this Goal?* displays. Choose *OK*.	A personal goal has been deleted.	

⚠ Caution

You must have at least one goal.

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

Result

Once the employee has completed setting their goals, the employee and manager discuss and agree on these goals. This is required in order to finalize the employee's goal plan.

4.1.2.2 Review Goal Plan and Add Individual Goals via Mobile Device (Optional)

Purpose

The Employee reviews the goals maintained by the manager for them and possibly adapts these. This includes editing and possibly deleting goals. In addition, the employee can create own individual goals.

If the mobile application is not enabled, this option is not available and only the procedure described in Review Goal Plan and Add Individual Goals on Company Website [page 25] can be executed.

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

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the *SAP SuccessFactors* mobile app and log on as **Employee** by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2.	**Access Goals and Select Goal Template**	In the *Goals* tile, tap *Plans* at the upper right corner to choose which goal plan you want to use (for example **`<year> Goal Plan>`**). Tap *Done*.	The *<year> Goal Plan* screen is displayed.	
3.	**Add New Goals**	Tap *Add Goal*. Make following entries: **`<Category>, <Goal Name (Required)>, <Metric/ Target(Required)>, <Weight(Required)>, <Status>, <Start>`** and **`<Due>`**. Tap *Done*.	A new goal has been created. You return to the *<year> Goal Plan* screen.	
4.	**Maintain Existing Goal**	Choose the goal which you want to edit. Tap *Edit* at the upper right corner and change the content for your goal then tap *Done*. You can also maintain comments to the goals for you or your subordinates by tapping *Add Comments*. After maintaining the comments tap *Done*.	The goal has been maintained.	
5.	**Delete Existing Personal Goal (Optional)**	In case you need to delete a personal goal, choose the goal which you want to delete. Tap *Delete Goal* at the bottom of the *Goal Detail* page. And choose *Delete*.	A personal goal has been deleted.	

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

Result

Once the employee has completed setting their goals, the employee and manager discuss and agree on these goals. This is required in order to finalize the employee's goal plan.

4.1.3 Update Goal Plan

Purpose

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

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

4.1.3.1 Update Goal Plan on Company Website

Purpose

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

Procedure

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Access Goals module**	Choose *Home* > *Goals* from the menu in the top left corner.	The *Goals* screen is displayed.	
3.	**Select Goal Plan**	Choose the *Expand or collapse goal plan details (arrow-down)* icon next to the goal plan name displayed as default in the right part of the screen. The *Select Goal Plan* quick card expands. Choose the appropriate **`<New copied goal plan>`** (for example **`<year> Goal Plan>)`** from the list.	The *<year> Goal Plan* screen is displayed.	
4.	**Update Goals**	Update your goals if needed. Proceed as described in process step Establish Goals for Self and Team on Company Website [page 19], test steps # 4, 6, 7.		

Result

The goal plan for the current year has been finalized.

4.1.3.2 Update Goal Plan via Mobile Device (Optional)

Purpose

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

If the mobile application is not enabled, this option is not available and only the procedure described in Update Goal Plan via Mobile Device (Optional) [page 30] can be executed.

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

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the *SAP SuccessFactors* mobile app and log on as **Employee** by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2.	**Access Goals and Select Goal Template**	In the *Goals* tile, tap *Plans* at the upper right corner to choose which goal plan you want to use (for example **`<year> Goal Plan>`**). Tap *Done*.	The *<year> Goal Plan* screen is displayed.	
3.	**Update Goals**	Update the appropriate goals if needed. Proceed as described in process step Review Goal Plan and Add Individual Goals via Mobile Device (Optional) [page 27], test steps # 3, 4.		

Result

The goal plan for the current year has been finalized.

4.2 Continuous Performance Management

Purpose

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

The process steps to achieve this are detailed below.

4.2.1 Maintain Activities

Purpose

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

If the SAP SuccessFactors Mobile application has been activated on the Employee's mobile device as described in Activate SAP SuccessFactors Mobile Application (Optional) [page 13] section, the employee has the option to maintain the activities either on the company instance website or on the mobile device.

These options are detailed below.

4.2.1.1 Maintain Activities on Company Website

Purpose

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

Procedure

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Add Activity**	In the *My Activities with <line manager>* part of the screen, choose *Create Activity*. In the upcoming *Create Activity* dialog box, enter *Activity Name* and *Status*. If the new activity has a relationship to an existing performance goal in the default performance goal plan, choose the *arrow-down* icon next to the *Performance Goal* field and select the appropriate goal. Choose *Save*. In the upcoming *Success* dialog box, you have the option to add another activity. Otherwise, choose *Close*.	A new activity has been added. You return to the *My Activities with <manager name>* screen. By default, your activities are grouped as *View by Status*. You can group them as *View by Goal* as well, however, only the activities that are linked to a performance goal will display.	
4.	**Edit Activity (Optional)**	If required, you can edit an existing activity. For this, choose the quick card of the appropriate activity. Then choose *Edit* in the top right corner. In the upcoming *Edit Activity* dialog box, update the details as applicable. Then choose *Save*.	The activity has been edited.	
5.	**Delete Activity (Optional)**	If required, you can delete an existing activity. For this, choose the quick card of the appropriate activity. Then choose *Delete* in the top right corner. In the upcoming *Delete* dialog box, confirm your choice by choosing *Delete*.	The activity, including any associated achievements (if existing), has been deleted.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
6.	**Add Update to Activity (Optional)**	You can add a comment to an activity. For this, choose the quick card of the appropriate activity. Add comments in the *Updates* text box and choose *Post* to save it. If required, you can edit the update by choosing the *Pencil (Edit)* icon next to the update. In the upcoming text box, update the information as applicable. Then choose *Save*. If required, you can delete the update. For this, choose the *Trash Bin (Delete)* icon next to the appropriate update, and in the upcoming dialog box, choose *Delete* to confirm your choice.	An update to the activity has been added.	

4.2.1.2 Maintain Activities via Mobile Device (Optional)

Purpose

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

If the mobile application is not enabled, this option is not available and only the procedure described in Maintain Activities on Company Website [page 32]can be executed.

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

Procedure

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
6.	**Add Update for Activity (Optional)**	To add a comment to an activity, choose *Add an Update* at the bottom of the screen and choose the *arrow* icon to send the update.	The update has been added.	

4.2.2 Maintain Employee Activities

Purpose

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

If the SAP SuccessFactors Mobile application has been activated on the Manager's mobile device as described in Activate SAP SuccessFactors Mobile Application (Optional) [page 13] section, the manager has the option to maintain the activities either on the company instance website or on the mobile device.

These options are detailed below.

4.2.2.1 Maintain Employee Activities on Company Website

Purpose

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

Procedure

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

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

4.2.2.2 Maintain Employee Activities via Mobile Device (Optional)

Purpose

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

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

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

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the *SAP SuccessFactors* mobile app and log on as Manager by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2.	**Access Activity Page**	Go to the *Team* tab and tap the direct report for whom you want to add an activity.	The *Employee Continuous Performance Management* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Add Activity for Employee**	On the next screen, choose *Activities* and choose the *Add* icon. Enter activity information in *Describe your activity* box and select *Status*. If applicable, link the activity to a performance goal by choosing *Goal* and choosing a goal on the upcoming *Goals* page. Make sure you are using the default performance goal plan. Then choose *New Activity* to go back to *New Activity* page. Choose *Save*.	A new activity has been added.	
4.	**Review Activities of Employee**	Review existing activities, which have been created by the employee. If appropriate, choose the activity and add a comment by choosing *Add an update*, then tap the *Arrow* icon to send the update.	The existing activities of a direct report have been reviewed.	

4.2.3 Request Feedback on Activities

Purpose

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

If the SAP SuccessFactors Mobile application has been activated on the Employee's mobile device as described in Activate SAP SuccessFactors Mobile Application (Optional) [page 13] section, the employee has the option to request feedback either on the company instance website or on the mobile device.

These options are detailed below.

4.2.3.1 Request Feedback on Activities on Company Website

Purpose

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

Procedure

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

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

4.2.3.2 Request Feedback on Activities via Mobile Device (Optional)

Purpose

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

If the mobile application is not enabled, this option is not available and only the option described in Request Feedback on Activities on Company Website [page 40] can be executed.

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

Procedure

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

4.2.4 Provide Feedback on Activities

Purpose

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

If the SAP SuccessFactors Mobile application has been activated on the Stakeholder's mobile device as described in Activate SAP SuccessFactors Mobile Application (Optional) [page 13] section, each employee within the organization has the option to provide feedback on activities of a particular employee either on the company instance website or on the mobile device.

These options are detailed below.

4.2.4.1 Provide Feedback on Activities on Company Website

Purpose

The Stakeholder provides via the company website feedback on the employee's activities.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Stakeholder**.	The *Home* page is displayed.	
2.	**Access Feedback Request**	On the *Home* page, choose the *You have # to-do items* alert icon from the top right corner of the screen. In the upcoming *To-Do* List side panel, choose the *Feedback Requests row*.	The *Feedback Requests* dialog box is displayed, containing the request for feedback sent by the employee. **i Note** In case you have received feedback requests from several employees, or an employee has sent feedback requests for different activities, the *Feedback Requests* dialog box contains the list of requests. For each request you can choose the *MORE* link to see the complete request.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Provide Feedback**	In the *Feedback Requests* dialog box, choose *View Request*. In the upcoming *Requested Feedback* dialog box, enter in the text box of each question your feedback as appropriate. Then choose *Send*. In the upcoming success dialog box, choose *OK*. **Note** You can also decline the feedback, by choosing *Decline* in the *Requested Feedback* dialog box. Then, choose in the upcoming *Warning* dialog box, *Confirm*. **Note** In case you have received several feedback requests, proceed in a similar way as described above.	The feedback has been sent. You return to the *Home* page. The feedback is immediately visible for the requesting employee. In addition, the requesting employee receives an appropriate email notification about the existence of feedback. **Note** In case you have received several feedback requests, you return to the *Feedback Requests* dialog box, in which the number of requests has been reduced by one. **Note** In case you have received several feedback requests from the same employee, separate emails will be sent out to that employee for each feedback you have provided.	

4.2.4.2 Provide Feedback on Activities via Mobile Device (Optional)

Purpose

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

If the mobile application is not enabled, this option is not available and only option described in Provide Feedback on Activities on Company Website [page 42] can be executed.

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

Procedure

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

4.2.5 View Feedback on Activities

Purpose

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

If the SAP SuccessFactors Mobile application has been activated on the Employee's mobile device as described in Activate SAP SuccessFactors Mobile Application (Optional) [page 13] section, the employee has the option to view this feedback either on the company instance website or on the mobile device.

These options are detailed below.

4.2.5.1 View Feedback on Activities on Company Website

Purpose

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

Procedure

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

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

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

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

4.2.5.2 View Feedback on Activities via Mobile Device (Optional)

Purpose

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

If the mobile application is not enabled, this option is not available and only option described in View Feedback on Activities on Company Website [page 46] can be executed.

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

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Open the **SAP SuccessFactors** mobile app and log on as **Stakeholder** by tapping the corresponding user name in the *Multi-Profile* screen.	The *To-Do* page is displayed.	
2	**Access Write Feedback Page**	Go to the *More* tab and tap *Feedback*.	The *Feedback* screen is displayed.	
3.	**View Feedback**	Tap the *<employee name>* under *Received Feedback* to check the feedback.	The feedback has been displayed.	

4.2.6 Prepare 1:1 Meeting

Purpose

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

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

If the SAP SuccessFactors Mobile application has been activated on the mobile devices of all employees as described in Activate SAP SuccessFactors Mobile Application (Optional) [page 13] section, they have the option to add topics to be discussed in the meeting either on the company instance website or on the mobile device.

These options are detailed below.

→ Recommendation

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

4.2.6.1 Prepare 1:1 Meeting on Company Website

Purpose

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

Procedure

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Add Topics to be Discussed in Meeting**	As an **Employee**, choose in the top right corner of the *My Activities with <manager name>* part of the screen, *Start Meeting*. In the upcoming *Meeting with <manager name> on <date>* page, enter topics for the meeting in the *Discussion Topics* text box and choose *Add*. As the employee's **Manager**, select in the *Active Channels* part of the screen the name of the direct report, with whom you want to schedule a meeting. Choose in the top right corner of the *Activities for <employee name>* part of the screen, *Start Meeting*. In the upcoming *Meeting with < employee name> on <date>* page, enter topics for the meeting in the *Discussion Topics* text box and choose *Add*.	Topics to be discussed in the next 1:1 meeting have been added.	

4.2.6.2 Prepare 1:1 Meeting via Mobile Device (Optional)

Purpose

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

If the mobile application is not enabled, this option is not available and only the option described in Prepare 1:1 Meeting on Company Website [page 49] can be executed.

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

Procedure

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

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

Purpose

The manager and employee have a 1:1 meeting to communicate with each other about the topic(s) prepared in process step Prepare 1:1 Meeting [page 48] by the employee and manager, respectively.

Procedure

This process step is executed outside of the software.

4.2.8 Capture 1:1 Meeting

Purpose

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

All meetings should be captured in the system; if at any time in the future the content of the meeting or the points of discussion need to be revisited, this can be easily done.Continuous Performance Management [page 31] takes a snapshot of the content from the meeting as it appeared during the discussion. Capturing the meeting also confirms that the meeting occurred.

If the **SAP SuccessFactors Mobile** application has been activated on the Employee's mobile devices as described in Activate SAP SuccessFactors Mobile Application (Optional) [page 13] section, they have the option to confirm the meeting either on the company instance website or on the mobile device.

These options are detailed below.

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

4.2.8.1 Capture 1:1 Meeting on Company Website

Purpose

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

Procedure

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

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

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

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

Purpose

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

If the mobile application is not enabled, this option is not available and only the option described in Capture 1:1 Meeting on Company Website [page 52] can be executed.

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

Procedure

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

> **i Note**
>
> Saving the meeting also confirms that the meeting occurred. Thus, each time you log on to the SAP SuccessFactors application, you will see the number of days since your last 1:1 meeting.
>
> In the *Meeting History* section, you can see all the captured meetings.

4.2.9 Maintain Achievements

Purpose

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

If the SAP SuccessFactors Mobile application has been activated on the Employee's mobile device as described in Activate SAP SuccessFactors Mobile Application (Optional) [page 13] section, the employee has the option to maintain the achievements either on the company instance website or on the mobile device.

These options are detailed below.

4.2.9.1 Maintain Achievements on Company Website

Purpose

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

Procedure

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**View Achievement**	On the *My Activities with <manager name>* , page choose *Achievements* on the top right corner of the screen.	The *Achievements* page is displayed, containing all your achievements so far.	
		Choose on the achievement quick card and view details.		

4.2.9.2 Maintain Achievements via Mobile Device (Optional)

Purpose

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

If the mobile application is not enabled, this option is not available and only the option described in Maintain Achievements on Company Website [page 55] can be executed.

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

Procedure

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

4.2.10 Maintain Employee Achievements

Purpose

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

If the SAP SuccessFactors Mobile application has been activated on the Manager's mobile device as described in Activate SAP SuccessFactors Mobile Application (Optional) [page 13] section, the manager has the option to maintain achievements either on the company instance website or on the mobile device.

These options are detailed below.

4.2.10.1 Maintain Employee Achievements on Company Website

Purpose

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

Procedure

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

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

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

4.2.10.2 Maintain Employee Achievements via Mobile Device (Optional)

Purpose

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

If the mobile application is not enabled, this option is not available and only the option described in Maintain Employee Achievements on Company Website [page 57] can be executed.

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

Procedure

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

4.2.11 Update Goal Plan (Optional)

Purpose

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

Procedure

Execute the appropriate steps as described in process step Update Goal Plan [page 29].

4.3 Performance Management

Purpose

At the end of the performance cycle, the employees summarize their performance by means of self-assessment on their goal achievements and competencies. The line managers as well review the employees' goal achievements and competencies and provide performance ratings. In a calibration session with the HR business partner and the next level manager, the employees' ratings are calibrated, after which the line manager engages in review discussions with each of the direct reports.

The process steps to achieve this are detailed below.

4.3.1 Launch Performance Review Forms

Purpose

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

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Talent Administrator**.	The *Home* page is displayed.	
2.	**Access Admin Center**	Choose *Home* > *Admin Center* from the menu in the top left corner.	The *Admin Center* screen is displayed.	
3.	**Access Launch Forms**	Type **Launch Forms** in the tool search box within the *Tools* card and select the feature/tool from the list.	The *Launch Forms* dialog box is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Select Form Template**	In the *Launch Forms* dialog box make following entries: *Type*: **`Performance Management`** *Form Template*: select from the dropdown list the performance review form template you have created in preliminary step Create Performance Review Template [page 8]. Choose *Next*.	You are directed to the *Launch Date* tab.	
5.	**Select Launch Date**	On the *Launch Date* tab, choose the date on which the forms should be launched. Then choose *Next*.	You are directed to the *Review Period* tab.	
6.	**Define Review Period**	On the *Review Period* tab, choose the period for the performance review. Then choose *Next*.	You are directed to the *Select Employees* tab.	
7.	**Select Employees**	On the *Select Employees* tab, select employees for whom the performance review should be executed: you can choose to select all active employees, select employees by name, or select group of employees. Then choose *Next*.	You are directed to the *Summary* tab.	
8.	**Launch Form**	On the *Summary* tab, check the selection you have made and make changes if necessary. In case the employee and line manager should be informed also via email about the form launch, flag the *Send email notifications to form recipients* checkbox. Then choose *Launch*. In the upcoming dialog box, confirm the displayed message by choosing *OK*.	You are directed to the *Done* tab, having a message showing the launching status, like, for example, *Form(s) creation is in progress*. Forms have been scheduled or launched.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
9.	**Confirm Launching Status**	On the *Done* tab, choose Close.	The Performance Review form has been created for the employee and can be found by the same on his or her *Home* page.	

Result

After having received the performance review form for the employees, the line manager can arrange meetings with the employees to discuss and agree on stakeholders to be involved for feedback.

4.3.2 Request Performance Feedback (Optional)

Purpose

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

Procedure

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Ask for Feedback from Raters**	Choose the *Team Overview* tab. On the *Team Overview* screen, choose in the *Feedback from Others* column, next to the employee's name for whom you want to request for feedback, *Ask for Feedback*. In the upcoming *Ask for Feedback about <employee name>* dialog box, enter in the *Add existing employee* text box, the names of the internal raters and select them. Then choose *Send email* to notice the raters to give feedback on the employee's performance.	The email notifications about the requested feedback on the employee's performance are sent to raters. An appropriate icon is displayed in the *Feedback from Others* column, next to the employee's name.	

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

Purpose

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

Procedure

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

Result

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

4.3.4 Review Feedback on Employee Performance (Optional)

Purpose

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

Procedure

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Review Feedback from Raters**	Proceed with one of the following options: **Option 1**: Choose the *Team Overview* tab. On the *Team Overview* screen, choose in the *Feedback from Others* column, next to the employee's name, the *<rater name> has provided feedback* icon. The *Feedback about <employee name>* dialog box is displayed, where you can review the feedback provided by the rater. When done, choose *X (Close)*. **Option 2:** Choose the *Reviews* tab. Go to the *Inbox* and choose in the *Form Title* column the appropriate *<year> Performance Review for <employee name>* hyperlink. In the upcoming form, choose the *Supporting* box in the top right corner of the screen. The *Supporting* dialog box is displayed, and you can review the feedback provided by the rater(s). When done, choose *X (Close)*.	The feedback from raters on the employee's performance have been reviewed.	

4.3.5 Perform Self-Assessment

Purpose

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

Procedure

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

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

4.3.6 Rate and Compare Employees Competencies (Optional)

Purpose

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

The main purpose of *Stack Ranker* is helping managers rate and comment their subordinated employees easier, but the manager does not necessarily need to use it. Normally stack ranker can be used for core competencies only and not for goals, job-specific and custom competencies, as these depend on the different roles of the individual persons.

Prerequisites

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

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* instance as **Manager**.	The SAP SuccessFactors *Home* page is displayed.	
2.	**Access Performance Review Form**	You can access the form as follows: **Option 1**: Choose *Home* > *Performance* from the menu in the top left corner. On the *My Forms* screen, go to the *Inbox* and choose in the *Form Title* column the appropriate *<year> Performance Review for <employee name>* hyperlink. **Option 2**: On the *Home* page, choose in the *For You Today* section, the *Review Employee Performance* > *Manager Review* card. **Note** In case the *View All* link displays on the *Review Employee Performance* card, it means, that you must perform tasks, which fall into this category, for several employees. Choose the *View All* link. In the upcoming *Review Employee Performance (#)* dialog box, choose the *Manager Review* card for the appropriate employee.	The performance review form for the selected employee is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Access Stack Ranker**	Choose the *Team Overview* tab. In the top left corner of the screen, select the appropriate `<Performance Template>`, and then choose *Team Rater* on the top right corner of the screen.	The *Performance Review Template* > *Core Competencies* screen is displayed.	
4.	**Rate or Comment Employees' Competencies**	Select the rating for the employees' competencies or add some comments. When finished, choose *I'm Done*.	You have rated or commented on the competencies of your direct reports. You return to the *Team Overview* > *<Performance Review Template>* screen.	

4.3.7 Perform Employee Review

Purpose

The Manager officially rates the performance of the direct reports.

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

Procedure

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Access Performance Review Form**	You can access the form as follows: **Option 1**: Choose *Home* > *Performance* from the menu in the top left corner. On the *My Forms* screen, go to the *Inbox* and choose in the *Form Title* column the appropriate *<year> Performance Review for <employee name>* hyperlink. **Option 2:** On the *Home* page, choose in the *For You Today* section, the *Review Employee Performance* > *Manager Review* card. **Note** In case the *View All* link displays on the *Review Employee Performance* card, it means, that you must perform tasks, which fall into this category, for several employees. Choose the *View All* link. In the upcoming *Review Employee Performance (#)* dialog box, choose the *Manager Review* card for the appropriate employee.	The performance review form for the selected employee is displayed. In case you have used the stack ranker as described in the previous process step Rate and Compare Employees Competencies (Optional) [page 67], the ratings of the core competencies have been taken over to the performance review form.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Evaluate Employee's Perform-ance**	Select ratings and, if appropriate, add comments for each goal and competency. In the *Summary* section, enter a value for the *Overall Performance Rating*. When done, choose *Send to Calibration*. On the next screen, enter a com-ment in the *Email Notification Comments* text box, if appropri-ate, and then choose *Send to Calibration* to confirm.	The evaluation of the employee's per-formance has been done. The form is sent to the HR Business Partner. The HR Busi-ness Partner receives an appropriate email notification about the form being now in his or her inbox. The form has disap-peared from your in-box; it is now in the *In Progress* › *En Route* folder at step **Calibration**.	

4.3.8 Plan Calibration Session

Purpose

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

Prerequisites

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

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Talent Administrator**.	The *Home* page is displayed.	
2.	**Access Admin Center**	Choose *Home* > *Admin Center* from the menu in the top left corner.	The *Admin Center* is displayed.	
3.	**Access Calibration Session screen**	Type **`Manage Calibration Sessions`** in the tool search box within the *Tools* card and select the feature/tool from the list.	The *Manage Calibration Sessions* screen is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Create Calibration Session**	Choose *Create New*. On the upcoming screen make following entries: On the *Basic Info* tab: • *Template*: **`<Calibration Template>`** • *Session Name*: **`<Calibration Session name>`** • *Session Owners*: **`<name of HR Business Partner>`** • *Session Facilitators*: **`<name of HR Business Partner>`** On the *People* tab: Use *Search* on the left side of the screen to select people. In the *Search Results* table on the middle of the screen, flag the checkbox next to the relevant person and choose *Actions* to add people into participants or subjects roles. **Note** The *Subject* is the employee being calibrated, whereas the *Participant* is the person performing the calibration, such as manager and second level manager. Choose *Save*. Choose the *Validation* tab. The validation of the calibration session is triggered. If the validation is successful, choose *Activate*. In the *Activate* dialog box, choose *Yes* to confirm.	The *Session Activated* dialog box is displayed, informing you that the calibration session has been activated successfully.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
5.	**Send Notification about Calibration Session Activation (Optional)**	**Option 1**: In case an email notification about the session activation should be sent out to the session owner, session facilitators, and participants, leave the *Send notification about session activation* checkbox flagged. Check that all persons, to whom you want to send the notification, are listed in the *Send to* text box. The *Email Subject and Message* text are suggested; accept them or adapt them as appropriate. Choose *OK*. **Option 2**: In case no email notifications should be sent out, unflag the *Send notification about session activation* checkbox and choose *OK*.	The *Session Activated* dialog box is displayed.	
6.	**Close Dialog Box**	Choose *OK* to close the *Session Activated* dialog box.	You return to the *Manage Calibration Sessions* screen. The newly created calibration session has status **`In Progress`**.	

4.3.9 Conduct Performance Calibration

Purpose

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

Prerequisites

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

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* Company Instance as **HR Business Partner**.	The *Home* page is displayed.	
2.	**Access Calibration Session**	You can access the calibration session as follows: **Option 1**: Choose *Home* > *Calibration* from the menu in the top left corner. On the *Calibration* screen, choose from the *Sessions (#)* table the *<Calibration Session name>* hyperlink (the one created in process step Plan Calibration Session [page 71]. **Option 2**: On the *Home* page, chose in the *For You Today* section, the *Complete Calibration / <Calibration Session name> card*.	The *Session List / <Calibration Session name>* screen is displayed.	
3.	**Calibrate Employee Performance Data**	The *Session List* > *<Calibration Session name>* screen has multiple tabs to view the relevant data. Choose the *LIST VIEW* tab. Rate the potential and performance of the employee by selecting an appropriate value from the dropdown list. Choose *Save*.	The employee's performance data has been calibrated. The read-only value in the *Calibration* column is calculated based on the selected ratings and the employee is moved automatically into the updated ranking in the performance matrix view (*CALIBRATION* tab).	
		For each employee, whose performance has been discussed during the calibration meeting, flag the checkbox on the very left of the employee's photo, and choose *Actions* on the top right above the *LIST VIEW* table. From the dropdown menu, which expands, select *Mark as Discussed*. **Note** The value in the *Discussed* column is set automatically to **Yes**. Then choose *Save*.		

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
4.	**Finalize Calibration Process**	Once the performance of all employees has been discussed, choose *Finalize*. In the upcoming *Finalize Session* dialog box, choose *Yes*. In the *Session Finalized* dialog box, you can choose to send email notifications about the session finalization to the session owner, session facilitators, and participants. For this, leave the *Send notification about session finalization* checkbox flagged. Check that all persons, to whom you want to send the notification are listed in the *Send to* text box. The *Email Subject* and *Message* text are suggested; accept them or adapt them as appropriate. Choose *OK*. In the upcoming *Success* dialog box, choose *OK* to confirm. **i Note** In case no email notifications should be sent out, unflag the *Send notification about session finalization* checkbox and choose *OK*.	You return to the *Session List / <Calibration Session name>* page, on which no editing is possible anymore. The calibration process has been finalized. The form has been sent to the employee's manager for finalizing it prior to communication to the employee. The manager receives an appropriate email notification.	

4.3.10 Finalize Performance Review

Purpose

The Manager finalizes the performance review of the employee prior communicating the decision to the employee.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Manager**.	The *Home* page is displayed.	
2.	**Access Performance Review Form**	You can access the form as follows: **Option 1**: Choose *Home* > *Performance* from the menu in the top left corner. On the *My Forms* screen, go to the *Inbox* and choose in the *Form Title* column the appropriate *<year> Performance Review for <employee name>* hyperlink. **Option 2**: On the Home page, choose in the *For You Today* section, the *Review Employee Performance* > *Performance Review Discussion* card. **Note** In case the *View All* link displays on the *Review Employee Performance*card, it means, that you must perform tasks, which fall into this category, for several employees. Choose the *View All* link. In the upcoming *Review Employee Performance (#)* dialog box, choose the *Performance Review Discussion* card for the appropriate employee.	The performance review form for the selected employee is displayed.	

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

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

Purpose

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

Procedure

This process step is executed outside of the software.

4.3.12 Sign Off Year-End Review

Purpose

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

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	**Log on**	Log on to *SAP SuccessFactors* company instance as **Employee**.	The *Home* page is displayed.	
2.	**Access Performance Review Form**	You can access the form as follows: **Option 1**: Choose *Home* › *Performance* from the menu in the top left corner. On the *My Forms* screen, go to the *Inbox* and choose in the *Form Title* column the appropriate *<year> Performance Review for <employee name>* hyperlink. **Option 2**: On the *Home* page, choose in the *For You Today* section, the *Review Your Performance* › *Employee Signature* card.	Your performance review form is displayed.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Add Electronic Signature**	If appropriate, enter a comment in the text box at the bottom of the screen. Then choose *Sign*. On the next screen, enter a comment in the *Email Notification Comments* text box, if appropriate, and then choose *Sign* to complete the form.	The form has been signed and has been moved to the In *Progress* > *En Route* folder with step **Manager Signature**. The form is sent to your manager. He or she receives an appropriate email notification about the form being now in the inbox for signing.	

Result

The annual performance review is completed from the employee's point of view.

4.3.13 Sign Off Employee Year-End Review

Purpose

After the employee has signed the performance review form, the Manager signs it as well.

Procedure

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	**Access Performance Review Form**	You can access the form as follows: **Option 1**: Choose *Home* > *Performance* from the menu in the top left corner. On the *My Forms* screen, go to the *Inbox* and choose in the *Form Title* column the appropriate *<year> Performance Review for <employee name>* hyperlink. **Option 2**: On the *Home* page, choose in the *For You Today* section, the *Review Employee Performance* > *Manager Signature* card. **Note** In case the *View All* link displays on the *Review Employee Performance* card, it means, that you must perform tasks, which fall into this category, for several employees. Choose the *View All* link. In the upcoming *Review Employee Performance (#)* dialog box, choose the *Manager Signature* card for the appropriate employee.	The performance review form for the selected employee is displayed.	
3.	**Add Electronic Signature**	If appropriate, enter a comment in the text box at the bottom of the screen. Then choose *Sign*. On the next screen, choose *Sign* to complete the form.	The form has been signed and has moved to the *Completed* > *Un-Filed* folder.	

Result

The annual performance review is completed.

i Note

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

4.4 360 Degree Review (Optional)

Purpose

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

The process steps to achieve this are detailed below.

4.4.1 Create 360 Degree Review Form for Self

Purpose

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

Procedure

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Create Form**	Choose *Create New Form*. In the *Select one of the form types below to begin* part of the screen, choose the *360 Review*link. In the *Subject for 360 Review* part of the upcoming screen, choose *Self - <employee name>.* In the *Review period and due date of 360 Review for <employee name>* part of the upcoming screen, accept the suggested dates or adapt them as appropriate. Choose *Create and Open*.	You are directed to the screen where you can nominate raters. Nevertheless, you can do this later on, as the form will be available on your *Home* page. **Note** In the present document, we consider that the employee nominates raters at a later point in time.	
4.	**Save Form**	Choose *Save and Close*.	You return to the *My Forms* screen; the newly created form is available in your *Inbox*.	

4.4.2 Review and Modify Rater List

Purpose

The Employee reviews the pre-generated rater list. He or she can remove raters from this list and can add other raters to this list. When done, the Employee sends the 360 degree review form to the line manager to approve the rater list.

Procedure

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
1.	Log on	Log on to *SAP SuccessFactors* Company instance as **Employee**.	The *Home* page is displayed.	
2.	Access Form	You can access the form as follows: **Option 1**: Choose *Home* > *Performance* from the menu in the top left corner. On the *My Forms* screen, go to the *Inbox* and choose in the *Form Title* column the appropriate *360 Review for <employee name>* hyperlink, which is in route map step *Employee Selects Participants*. **Option 2**: In the *For You Today* section on the *Home* page, choose in the *Complete 360 Evaluation* > *Employee Selects Participants* card the *Go to Form link*.	The *360 Review for <employee name>* screen is displayed. The *RATER LIST* section contains the pre-generated list of raters.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	Modify Rater List	In the *RATER LIST* section, check the pre-generated rater list. To **add a participant**, choose *+ Add Participants*. In the *Add Participants* dialog box, depending, if the rater is an employee within the company or and external participant, proceed as follows: • for an internal rater, enter the rater's name in the *Find a User* field and choose the employee directly. • If the rater is an external participant, type **Add** into the *Find a User* field and choose *Add a new external participant*. In the *Add a New External Participant* dialog box, enter the rater's *Email, First Name* and *Last Name*, then choose *Add.* For both internal and external raters, select in the *Category* column an appropriate value from the dropdown list and choose *Add to List*. To **delete a participant**, choose from the *Action* column the *Delete* icon within the rater's line. In the *Confirmation* dialog box, choose *OK*. ⚠ Caution Make sure to have chosen at least five participants for your 360 degree review! Otherwise,	You have added or deleted raters from your rater list.	

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
		an error message is issued, and you cannot send the rater list for approval!		
4.	Send to Next Processor	Choose *Send to Next Step*. In the upcoming *Confirmation* dialog box, you can enter a comment in the *Email Notification Comments* text box, if appropriate. Confirm by choosing *Send to Next Step*.	You have nominated the raters for your 360 degree review. The form has been sent to your manager for approval. Your manager receives an appropriate email notification about the approval needed for the rater list suggested. The form has disappeared from your inbox; it is now in the *In Progress* > *En Route* folder at step **`Manager Approves Participants`**.	

4.4.3 Review Employee Rater List

Purpose

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

Procedure

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

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	Maintain Rater List	In the *RATER LIST* section, check the raters currently listed. You can add participants, by choosing *+Add Participants*, or delete participants, by choosing the *Delete* icon within the row of the rater's name. ⚠ Caution Make sure to have chosen at least five participants for the employee's 360 degree review! Otherwise, an error message is issued, and you cannot approve the rater list!	You have modified the rater list suggested by your direct report, if appropriate.	
4.	Approve Rater List	Choose *Send to Next Step*. In the upcoming *Confirmation* dialog box, enter in the *Email Notification Comments* text box a message to the raters. Then choose *Send to Next Step*.	You have approved the raters for the 360 degree review of your direct report.	

> **Note**
>
> If you do not agree with the list of raters nominated by the employee, you can reject it by choosing *Send to Previous Step*, entering in the *Email Notification Comments* text box on the subsequent screen an explanation of your decision, and confirming the choice by choosing again *Send to Previous Step*. In this case, the employee needs to nominate again raters and send them to you for approval. For details on adapting the rater list, refer to process step Review and Modify Rater List [page 83].

Result

The 360 degree review form of the employee has been sent to the raters for evaluation. The Raters receive appropriate email notifications with the request to participate in the employee's 360 degree review. Each Rater can decide to accept or decline the participation in the 360 degree review.

4.4.4 Perform 360 Degree Review

Purpose

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

> **i Note**
>
> The Employee and his or her Manager will perform a 360 Degree Review of the competencies and behaviors of the Employee as well.

Procedure

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
2.	Access Form	You can access the form as follows: **Option 1**: Choose *Home* > *Performance* from the menu in the top left corner. On the *My Forms* screen, go to the *Inbox* and choose in the *Form Title* column the appropriate *360 Review for <employee name>* hyperlink, which is in route map step *Provide Feedback*. **Option 2**: In the *For You Today* section on the *Home* page, choose in the *Complete 360 Evaluation* > *Provide Feedback* card the *Go to Form link*. **Note** In case you are involved in several 360 degree reviews, the *View All* link displays on the *Complete 360 Evaluation* card. Choose that link; a dialog box displays, which contains *Complete 360 Evaluation* cards in various route map steps for each employee. Choose the *Go to Form* link in the appropriate *Complete 360 Evaluation* > *Provide Feedback* > *<employee name>* card. You can also choose the hyperlink given in the email notification you received about the 360 degree feedback requested.	The *360 Review for <employee name>* screen is displayed. In case you don't want to participate in the 360 degree review, you can choose *Decline to Participate*. In the upcoming *Confirmation* dialog box, you can enter an explanation in the *Email Notification Comments* text box. Then choose again *Decline to Participate*. In case you accept to participate in the 360 degree review, continue with test steps **#3** and **#4**.	
3.	Rate Competency	In the *COMPETENCY FEEDBACK* section, give rating scores to each of the competency listed in the form by selecting values for the *Rating*. If necessary, enter comments for each competency in the *Comments* text area.	You have given your ratings and comments to each competency of the employee being evaluated.	
4.	Submit Form	Choose *Submit Finished Form*. In the upcoming *Confirmation* dialog box, you can enter a comment in the *Email Notification Comments* text box, if appropriate. Confirm by choosing again *Submit Finished Form*.	You have submitted your feedback for the employee's 360 degree review. The form has disappeared from your inbox; it is now in the *Completed* > *Un-Filed* folder. You cannot change the form anymore.	

Result

The rated employee and their manager receive appropriate emails about the completion of feedback by the rater(s).

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

4.4.5 Review "Detailed 360 Degree Report"

Purpose

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

The detailed 360 degree report can only be checked as a final version after the 360 degree review process has been finished, meaning all the raters have given their feedback. Only after all raters perform the 360 degree reviews (see process step Perform 360 Degree Review [page 89]), the related 360 degree review form will be moved to the *Completed* folder and the detailed report can be accessed.

Procedure

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

Test Step #	Test Step Name	Instruction	Expected Result	Pass / Fail
3.	**Access Form**	On the *My Forms* screen, go to the *Completed* folder and choose in the *Form Title* column the appropriate *360 Review for <employee name>* hyperlink.	The *360 Review for <employee name>* screen is displayed.	
4.	**Open Detailed 360 Report**	In the *EVALUATION SUMMARY* section, choose the *Open Detailed 360 Report* hyperlink.	The *Detailed 360 Report of 360 Review* page is displayed.	
5.	**Check 360 Degree Review Result**	Check following information: • How many raters from each rater category gave feedback; • The average feedback results from raters for each competency; • Min / Max rating values for each competency. You can also print or save the report as PDF by choosing *Print*.	The feedbacks from 360 degree review raters have been reviewed.	

Result

The 360 degree review is completed; the results provide inputs to other processes, for example in *Development Goals*.

5 Appendix

5.1 Process Integration

5.1.1 Succeeding Processes

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

Process	Business Condition
Career and Development Planning with Integration to Continuous Performance Management in SAP SuccessFactors of **SAP Best Practices for SAP SuccessFactors Succession & Development**	The Continuous Performance Management Achievements can display directly in the employee's default Career Development Plan. The feedbacks from the 360 degree review can be used in the employee's further career development planning.
Compensation Management in SAP SuccessFactors of **SAP Best Practices for SAP SuccessFactors Compensation**	The official performance rating can be used in the compensation module.
Variable Pay Planning in SAP SuccessFactors of **SAP Best Practices for SAP SuccessFactors Compensation**	The official performance rating can be used in the variable pay module.
Depending on the successor nomination method used within your company, one of below processes: • *Succession Management in SAP SuccessFactors* of **SAP Best Practices for SAP SuccessFactors Succession & Development** • *Succession Management with MDF Position-Based Nomination and Integration to Recruiting* of **SAP Best Practices for SAP SuccessFactors Succession & Development**	The ratings of the employee can be used in the succession module.

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