

SAP SuccessFactors
HCM Suite

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English

Configuration Guide - Getting started with Implementing the SAP Best Practices for SAP SuccessFactors Performance & Goals

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Icons

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax

Typographic Conventions

Type Style	Description
<i>Example text</i>	Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths and options. Cross-references to other documentation.
Example text	Emphasized words or phrases in body text, titles of graphics and tables.
EXAMPLE TEXT	Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example, SELECT and INCLUDE.
Example text	Screen output. This includes file and directory names and their paths, messages, source code, names of variables and parameters as well as names of installation, upgrade and database tools.
EXAMPLE TEXT	Keys on the keyboard, for example, function keys (such as F2) or the ENTER key.
Example text	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.

Contents

1	Solution Overview	6
2	System Setup & Preparation	6
2.1	SAP SuccessFactors Instance Preparation	7
2.2	Enabling Features in Provisioning	7
3	Preparing Implementation	17
3.1	Creating a Super Admin User	17
3.2	Managing Role-Based Permission Access for Super Admin	18
3.3	Creating Permission Group for Super Admin User	19
3.4	Creating Permission Role for Super Admin User	19
3.5	Managing Employee Import Privilege	20
3.6	Setting Proxy	20
4	Implementation	21
4.1	Enable Home Page V3	21
4.2	Enable Intelligent Services	22
4.3	Enable Fiori User Experience UI	23
4.4	Getting Configuration Guides	24
4.5	Getting Configuration Files	24
4.6	Getting Configuration Workbooks	25
4.7	Additional Step after Feature Enable (Optional)	25
4.8	Adding Standard Dashboard/Tiles into Instance (Optional)	26
5	Evaluate Business Content/Processes	27
5.1	Import Employee Demo Data	27
5.2	Review of Business Processes	27
6	Security Aspects	28
6.1	User Administration and Authentication	28

Configuration Guide to Implementing the SAP Best Practices for SAP SuccessFactors Performance & Goals

Purpose

This configuration guide provides all activities you need to carry out before you implement the solution package from system preparation to implementation of business content and validation. It refers to the **Software and Delivery Requirements** for details that are addressed in these activities.

Further Info

This document does not provide a general overview and explanation of solutions. For more information about the solutions concepts, see the related documentation on <https://rapid.sap.com/bp/>.

This document is intended for the following project roles, which already have a sound knowledge of SAP Best Practices implementation, including tools and documentation.

- Business consultants: Evaluate business content/processes including troubleshooting, FAQ and further information for extended usage of the package
- Activation/implementation consultants (basis or application consultants): Activation/implementation of business content and processes



Please logon on link https://rapid.sap.com/bp/rds_sf_pa to check all assets delivered in this package, and you also can click on "Download" button on right corner to store the file to local.

1 Solution Overview

SAP Best Practices for SAP SuccessFactors Performance & Goals:

- Is a pure cloud solution and is based on SAP SuccessFactors Performance and Goal Management solution
- Provides an accelerated deployment of the required configuration settings
- Covers End-to-End goal management, performance management, 360 degree review, continuous performance management processes for SAP SuccessFactors customers
 - ✓ People Profile Maintenance in SAP SuccessFactors
 - ✓ Goal Management in SAP SuccessFactors
 - ✓ Performance Management in SAP SuccessFactors
 - ✓ 360 Degree Review in SAP SuccessFactors
 - ✓ Continuous Performance Management in SAP SuccessFactors

For an overview of the solution scope, check document **Customer Presentation (File Title: Customer Presentation)** on the SAP Best Practices Explorer (https://rapid.sap.com/bp/rds_sf_pa) which under navigation **Accelerators**.

Prerequisite of the package is that basic user data is available.

- Customer who use SAP SuccessFactors Employee Central (EC) as core HRIS system, need ensure the data mapping between SAP SuccessFactors Employee Central and People Profile (PP3) is already in place. For details, please check configuration guide **1BO Performance & Goals: General Settings**.
- Customer who use SAP ERP HCM as core HRIS system, needs to ensure that the transfer of SAP ERP HCM basic employee data to SuccessFactors has been set up. Please refer to **SAP SuccessFactors Talent Management Suite integration to SAP ERP HCM rapid-deployment solution** (<http://service.sap.com/rds-hcm-sfsf>). If you need further information.
- Customer who not use SAP SuccessFactors EC and SAP HCM as core HRIS system, can import basic user data manually. For details, check following section **“Import Employee Demo Data”**.

2 System Setup & Preparation

It is important to note that in order to perform some of the steps within this guide:

- The implementer is required to have completed the Foundation of SAP SuccessFactors HCM Academy and the SAP SuccessFactors Performance and Goal Academy training. Thus, this documentation is written with an assumption that its audience is familiar with the SAP SuccessFactors Performance and Goal solution.
- The consultant must also have access to the Provisioning environment for the customer. Follow the procedures from SAP SuccessFactors in order to obtain provisioning access to the Customer's system.

For the configuration execution access to the provisioning for the instance is required. If not available access to provisioning could be requested via SAP SuccessFactors:

- For Partners via Support Portal <https://support.sap.com/> leveraging the ONE Support Launchpad <https://launchpad.support.sap.com/> for the creation of an incident
- For SAP internals via JIRA <http://jira.successfactors.com/>



The products which SAP Best Practices for SAP SuccessFactors Performance & Goals uses are described in the document: **SAP Best Practices for SAP SuccessFactors Performance & Goals: Software and Delivery Requirements (File Title: Software and delivery**

requirements). please check document on the SAP Best Practices Explorer (https://rapid.sap.com/bp/rds_sf_pa), under tab **Accelerators**.

2.1 SAP SuccessFactors Instance Preparation

Prior to starting with SAP Best Practices for SAP SuccessFactors Performance & Goals, the target instance in the Cloud needs to be requested and available.

- For the customer who never uses any SAP SuccessFactors modules, can obtain our solution predefined best practice content via copying from the Best Practice pre-configured instance provided as part of this package directly. For details, check **SAP Notes [2385227](#) SAP Best Practices for SAP SuccessFactors Performance & Goals**.
- For the customer who has used other SAP SuccessFactors modules, please continue to use your instance and configure the predefined best practice content manually following the steps described in the configuration guides. All the configuration guide documentation can be downloaded SAP Best Practice Explorer.

When your instance is available, please enable relevant features in provisioning following the steps described in section “**Enable Features in Provisioning**” in this document.



Instance setup is not part of the delivered scope of the solution.

2.2 Enabling Features in Provisioning

Use

Enable the relevant features in provisioning as the prerequisite to start best practice configuration in the Admin Center later. The features mentioned below is the minimum settings to support this solution, if in customer instance more features have been enabled, please check details and get support from PS if need.

Procedure

1. Log in to SAP SuccessFactors Provisioning for your instance using the following link:

Link	<a href="https://<server>.successfactors.com/provisioning_login">https://<server>.successfactors.com/provisioning_login
------	---

2. Choose the *Company* by clicking on the *Company Name* to enable below features:



- **General Features**

Product	Components	Features	Related Scope Items	Comments
SUCCESSFACTORS BIZX SUITE	SFSF PLATFORM	Language Packs	All	<p>SAP Best Practices for SAP SuccessFactors Performance & Goals predefined content has considered 10 language, please enable the language which customer want to deploy.</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Deutsch (German) <input checked="" type="checkbox"/> English UK (English UK) <input checked="" type="checkbox"/> English US (English US) <input checked="" type="checkbox"/> Español (Mexico) <input checked="" type="checkbox"/> Español (Spanish) <input checked="" type="checkbox"/> Français (French) <input checked="" type="checkbox"/> Français canadien (Canadian French) <input checked="" type="checkbox"/> Italiano (Italian) <input checked="" type="checkbox"/> Português do Brasil (Brazilian Portuguese) <input checked="" type="checkbox"/> 简体中文 (Simplified Chinese)
SUCCESSFACTORS BIZX SUITE	SFSF PLATFORM	<ul style="list-style-type: none"> Version 10 UI Plus UI Version 12 UI framework (Revolution) Version 11 UI framework (ULTRA) 	All	Ensure the user interface options have been selected.
SUCCESSFACTORS BIZX SUITE	SFSF PLATFORM	<ul style="list-style-type: none"> Ultra Organization Chart [requires Version 10 UI or Version 11 UI framework (ULTRA)] 	All	Enable the org chart function in Company Info Tab.
SUCCESSFACTORS BIZX SUITE	SFSF PLATFORM	<ul style="list-style-type: none"> Role-based Permission (This will disable Administrative Domains) 	All	Ensure the role based permission have been selected.
SUCCESSFACTORS BIZX SUITE	SFSF PLATFORM	<ul style="list-style-type: none"> Enable Proxy Feature 	All	Enable the proxy management feature.
SUCCESSFACTORS BIZX SUITE	SFSF PLATFORM	<ul style="list-style-type: none"> Admin Configuration Tool 	All	When customer receive a new instance, by default the feature is enabled.
SUCCESSFACTORS BIZX SUITE	SFSF PLATFORM	<ul style="list-style-type: none"> Show ToDo Portlet 	All	Keep Customer to check ToDo List on Home Page.
SUCCESSFACTORS BIZX SUITE	SFSF PLATFORM	<ul style="list-style-type: none"> Writing Assistant User Directory Enable Advanced Find User Component Legal Scan Spell Check Workflow Competency Library Management Suite Turn on on-demand dashboard option 	All	After enabling Competency Library, scroll to the bottom of the Company Settings page to "The company is allowed to add new competencies" and from the "add Source Library" field, choose SuccessFactors (XX) from the drop down menu. Save this setting by selecting the 'add' button.

Product	Components	Features	Related Scope Items	Comments
SUCCESSFACTORS BIZX SUITE	SFSF PLATFORM	Document Attachment: <ul style="list-style-type: none"> Attachment Storage Allocation – 1000G Attachment user limit – No Limit Attachment max file size – 10M Attachment Limit Notification Monitor Period – 7d 	All	Modify the settings as described.
SUCCESSFACTORS BIZX SUITE	SFSF PLATFORM	NextGen Admin Homepage (Admin v3.0) — requires “Version 12 UI framework (Revolution)”, “Enable Performance Metrics Portal” and “Enable Action Search (requires Role-based Permission, Generic Objects and Version 12 UI framework (Revolution))”	All	
SUCCESSFACTORS BIZX SUITE	SFSF PLATFORM	Enable Upgrade Center Permission - requires "Role-based Permission"	All	

• **People Profile**

Product	Components	Features	Related Scope Items	Comments
SUCCESSFACTORS BIZX SUITE	SFSF PLATFORM	Live Profile	All	
		Profile V12 <ul style="list-style-type: none"> Enable Public Profile People Profile	All	Note that: this opinion can be activated from the Upgrade Center
		Employee Scorecard Dashboard	All	Enable Scorecard Section in Employee Profile

• **Goal Management – Total Goal Management**

Product	Components	Features	Related Scope Items	Comments
SUCCESSFACTORS BIZX SUITE	SFSF PERFORMANCE & GOALS	Objective Management Suite • Total Objective Management	FP1	
		TGM Version 10 UI	FP1	
		My Objectives Tab	FP1	
		Enable Group Objectives 2.0 — requires “Total Objective Management”	FP1	
		Enable Objective Management V12	FP1	
		Enable Objective Management Access Permission	FP1	
SUCCESSFACTORS BIZX SUITE	SFSF PERFORMANCE & GOALS	Configure Objective Execution • Enable Execution Map • Enable Status Report • Enable Meeting Agenda	FP1	For Goal Execution
SUCCESSFACTORS BIZX SUITE	SFSF PERFORMANCE & GOALS	Enable Initiatives	FP1	
SUCCESSFACTORS BIZX SUITE	SFSF PERFORMANCE & GOALS	Enable Team Goals	FP1	

• **Continuous Performance Management**

Product	Components	Features	Related Scope Items	Comments
SUCCESSFACTORS BIZX SUITE	SFSF PERFORMANCE & GOALS	Enable Continuous Performance Management	2DN	

• **Performance Management**

Product	Components	Features	Related Scope Items	Comments
SUCCESSFACTORS BIZX SUITE	SFSF PERFORMANCE & GOALS	Performance Appraisal Smart Form	FP2	
		PM v12 Acceleration – requires “Performance Appraisal Smart Form”	FP2	Enable PM v12 Acceleration
		Stack Ranker for Performance Management	FP2	Enable Stack Ranker
		Enable Performance Management Access Permission	FP2	
		Rich Text editor for PM and 360	FP2, FP3	Enable “Rich Text” feature for PM and 360
		Enable Team Overview Access Permission	FP2	

• **Calibration**

Product	Components	Features	Related Scope Items	Comments
SUCCESSFACTORS BIZX SUITE	SFSF PERFORMANCE & GOALS	<ul style="list-style-type: none"> • Enable Calibration • Enable Calibration Executive Review • Enable Fiori Restyling for Calibration Select the permission model <ul style="list-style-type: none"> • Use Role based permission model 	FP2	

- **360 Review**

Product	Components	Features	Related Scope Items	Comments
SUCCESSFACTORS BIZX SUITE	SFSF PERFORMANCE & GOALS	360 Multi-rater	FP3	
		Graphical Report (360)	FP3	Enable 360 Detailed Report
		Enable Use of External Users (V10 & V11 ONLY)	FP3	Enable the feature by checking the items on the right. And Press Save button in the right side of this row.
		Stack Ranker for 360	FP3	Enable stack ranker for 360 review



- **Analytics**



Product	Components	Features	Related Scope Items	Comments
SUCCESSFACTORS BIZX SUIT	SFSF PLATFORM	Analytics Tab (Reporting button in V9) <ul style="list-style-type: none"> • List View(Dashborad Drilling) • Spotlight Views • Spreadsheet Reports • Classic Reporting 	All	Enable Analytics and Reporting
		Ad Hoc Report Builder <ul style="list-style-type: none"> • Performance Management • 360 Multi-Rater Subject 	All	No report delivered in this solution, just enable Ad Hoc Report functions to make sure customer can create ad-hoc report

		<ul style="list-style-type: none"> • Enable Ad Hoc Field Level Permission (Employee Profile Only) • Enable Ad Hoc Cell Level Permission (Employee Profile Only) • Enable Ad hoc row level permission for Succession subdomain schema (only support MDF Position) • Enable Ad hoc field level permission for Succession subdomain schema (only support MDF Position) • Enable Ad hoc cell level permission for Succession subdomain schema (only support MDF Position). • Generate Excel 2010 Output for Adhoc Reports • Enable Performance Enhancement for generating Excel 2010 Output for Adhoc Reports (Note that styles and graphs are not supported in this mode) • Enable Field Level Permission for data model elements (in all Sub domain schemas) • Enable Cell Level Permission for data model elements (in all Sub domain schemas) • Enable Cell Level Permissions on group by reports [<i>Demoable, Not Ready for Production</i>] • Apply Cell Level Permission for aggregation selection(s) 		
--	--	---	--	--

Product	Components	Features	Related Scope Items	Comments
		[Demoable, Not Ready for Production]		

- After enabling features, click **Save** and on the pop-up windows, enter your instance ID and **Confirm**.



The customer who is the new SAP SuccessFactors customer, after enabling analytic features, "Dashboard 2.0" will be enabled automatically. The solution doesn't deliver any predefined dashboards and tiles, customer can create dashboard and tiles or reuse standard one which delivered by product team. From link http://help.sap.com/hr_analytics, you can find out **Implementation Handbook** and **Standard Dashboards and Tiles**.

Please follow section "**Adding Standard Dashboard/Tiles into Instance**" in this document to add standard dashboard and tiles from Success Store.

For the instance is copied from Best Practice pre-configured instance:

- Standard tile "Objective Status by Category" "Performance Form Status" have been added and a sample tile "Open Requisitions by Recruiter" is created as reference. The three tiles have been set to display on homepage.
- One sample Tile – Based Dashboard "Overview" is created as reference and standard tile "Objective Status by Category" "Performance Form Status" "Overall Performance Rating" are assigned (please share the dashboard with user to review analytics data).

3 Preparing Implementation

3.1 Creating a Super Admin User



- If your instance is copied from the Best Practice pre-configured instance, a predefined super admin user "superuser" already exists. Please avoid to use the same user name during creating super admin.
- If your instance is not copied from the Best Practice pre-configured instance, please create the super admin user following the steps described below. One special case is when you implement the SAP SuccessFactors Align & Perform package on top of your existing instance with other SAP SuccessFactors modules running, it is assumed that you've already created a super admin user during your previous implementation phase, then you can ignore this section.

Use

This section describes how to create a super admin user in customer instance.

Procedure

1. Log in to SAP SuccessFactors Provisioning for your instance using the following link:

Link	<a href="https://<server>.successfactors.com/provisioning_login">https://<server>.successfactors.com/provisioning_login
-------------	---

2. Choose the Company by clicking on the Company Name
3. Access the activity using one of the following navigation options:

Menu Path	<i>Edit Company Settings → Company Settings</i>
------------------	---

4. Search for *Admin Username* and Enter the following fields:

Admin Username	Value = e.g. SuperAdmin
Admin Password	Enter password that is suitable according to your company policy
Admin First Name	Enter the first name for the Admin User
Admin Last Name	Enter the last name for the Admin User
Admin Email	Enter the Admin's email address

5. Select the *Create Admin* button to create the admin user.
6. On the pop up screen *Confirm Changes* enter your company id, such as BPMASTER02 and click *Confirm*.
7. Super Admin user has been generated successfully.



The Super User will be asked to change the password on first logon into instance.

3.2 Managing Role-Based Permission Access for Super Admin



If the SAP SuccessFactors Align & Perform package is implemented on top of your existing instance with other SAP SuccessFactors modules running, it is assumed that your existing super admin user already has the permission to manage Role-Based Permission Access. Please ignore this step.

Use

This configuration is to specify who can manage Role-Based Permission in the system and the user with Role-Based Permission Access privileges will be able to manage permission roles and assign users to those roles. This section describes how to assign the Role Based Permission Access for Super Admin user created in the previous step.

Procedure

1. Log in to SAP SuccessFactors instance using the following link:

Link	<a href="https://<server>.successfactors.com/login">https://<server>.successfactors.com/login
-------------	---



For the customer who logon into instance and find the default Admin Center screen is **Next Generation Admin Center**, please click on the *Switch back to OneAdmin* link to switch

back to the **Admin Center** screen. All configuration steps described in this document and other configuration guide documents are based on Admin Center.

2. Go to *Admin Center* from *Home* tab. In the *Manage Employees* portlet, select *Set User Permissions*.
3. Select *Manage Role-Based Permission Access*, the *Manage Role-Based Permission Access* page opens.
4. Choose *Add User*, in the *Username* field enter the Super Admin user name created before and press *Search*.
5. Select the super admin username in the *Search Users* portlet and press *Grant Permissions* button. And admin user now has access to maintain role based permissions.

3.3 Creating Permission Group for Super Admin User



- If your instance is copied from the Best Practice pre-configured instance, a “ SAP BestPractices Super Admin” group already exists. Please check in your instance and add new created super admin user into this permission group.
- If your instance is not copied from the Best Practice pre-configured instance, please create the SAP BestPractices Super Admin group as described below. If the SAP SuccessFactors Align & Perform package is implemented on top of your existing instance with other SFSF modules running, it is assumed that there is already a super admin group available. Please ignore this section.

Use

This section describes how to create a super admin permission group in customer instance.

Procedure

1. Log in to SAP SuccessFactors instance using the following link:

Link	<a href="https://<server>.successfactors.com/login">https://<server>.successfactors.com/login
-------------	---

2. Go to *Admin Center* from *Home* tab. In the *Manage Employees* portlet, select *Set User Permissions*.
3. In the *Set User Permissions* section, select *Manage Permission Groups*, the *Manage Permission Groups* page opens, select *Create New*.
4. On *Permission Group* screen, enter SAP BestPractices Super Admin in *Group Name* field, and on the *Choose Group Members* section, click *Username* and on *Search Result* screen, enter the super Admin user name to add the user to the permission group.
5. Click *Done* to save.

3.4 Creating Permission Role for Super Admin User



- If your instance is copied from the Best Practice pre-configured instance, a predefined “ SAP BestPractices Super Admin” user role already exists in the instance. Please double check to ensure that permissions listed in the section are granted.
- If your instance is not copied from the Best Practice pre-configured instance, please create the “ SAP BestPractices Super Admin” user role as described below. If the SAP SuccessFactors Align & Perform package is implemented on top of your existing instance with other SFSF modules running, it is assumed that there is already a super admin user role available. You only need to check and ensure that all permissions listed in this section are granted.

Use

This section describes how to create (check) permission role for super admin user.

Procedure

1. Log in to SAP SuccessFactors instance using the following link:

Link	<a href="https://<server>.successfactors.com/login">https://<server>.successfactors.com/login
-------------	---

2. Go to *Admin Center* from *Home* tab. In the *Manage Employees* portlet, select *Set User Permissions*.
3. In the *Set User Permissions* section, select *Manage Permission Roles* and on the *Permission Role Detail* screen to check permission listed below have been covered:

Role	User Permissions	Administrator Permissions	Permission Groups or Users	Target Population
SAP BestPractices Super Admin	All	All	SAP BestPractices Super Admin	Everyone

4. Click *Save*.

3.5 Managing Employee Import Privilege



If the SAP SuccessFactors Align & Perform package is implemented on top of your existing instance with other SAP SuccessFactors modules running, it is assumed that existing super admin user already has the permission to manage employee import. Please skip this step.

Use

This section describes how to assign employee import permission for super admin user.

Procedure

1. Log in to SAP SuccessFactors instance using the following link:

Link	<a href="https://<server>.successfactors.com/login">https://<server>.successfactors.com/login
-------------	---

2. Go to *Admin Center* from *Home* tab. In the *Manage Employees* portlet, select *Set User Permissions*.
3. In the *Set User Permissions* section, select *Manage employee Import*.
4. On *Manage Employee Import Privilege* screen, enter super admin user relevant information in search criteria fields and click *Search Users*.
5. On search result screen, select super admin user and all employee criterias, such as *All Divisions*, *All Departments*.
6. Click *Save Definition For Selected Users* to save.

3.6 Setting Proxy



If the SAP SuccessFactors Align & Perform package is implemented on top of your existing instance with other SFSF modules running, it is assumed that following settings have already been set. Please skip this step.

Use

This section describes the set up steps to activate proxy management in SAP SuccessFactors.

Procedure

1. Log in to SAP SuccessFactors instance using the following link:

Link	<a href="https://<server>.successfactors.com/login">https://<server>.successfactors.com/login
------	---

2. Navigate to *Admin Centers* → *Manage Employees Portlet*, select *Proxy Management*.
3. Under *Change the proxy settings for the company*, make sure *Enable Advanced Proxy Management (Proxy Now and Proxy Import)* has been checked.
4. Select the *Save Proxy Settings* button.

4 Implementation

The Configuration Guide describes crucial parts of the system configuration of the respective process which needs to be put on top of the already available setup in the provided tenant based on the Best Practices Master. Implement the solution by following the configuration guides according to the sequence of the Prerequisites Matrix.

The Prerequisites Matrix gives an overview of the configuration building blocks and related configuration guides, required for each business process and the correct sequence for implementing the building blocks.

The *Prerequisites Matrix* is accessible via SAP Best Practices Explorer (https://rapid.sap.com/bp/rds_sf_pa): **Accelerators** -> **SAP Best Practice content library**, and in the *What you also need to know* section, check *Prerequisites Matrix (File name: RDS_SF_PA_SFSUITE1711_06_Prerequisites_Matrix_EN_XX.xls)*.

If customer instance is refreshed using Best Practice pre-configured instance, assume most of configuration has existed in. please check content following configuration guide and configure Role Based Permission manually.

Prerequisites

Before you can start activating the business processes manually, the following activities must be completed:

- The system has been set up according to section *System Setup & Preparation* in this guide.
- The general system settings have been made. For more information, see section *Preparing Implementation* in this guide.

4.1 Enable Home Page V3


This section describes the steps necessary to enable the Home Page V3 – the new home page with Fiori-like tiles and a new Approval requests UI.




This is an optional feature. If the Best practices pre-configured instance is copied, then the Home Page V3 is already enabled and you can skip below steps. However, if the Best Practices pre-configured instance cannot be copied, please consider the below steps for upgrading to the Home Page V3.

Pre-requisite Provisioning Switch

Please ensure that the provisioning switch mentioned below is checked on before proceeding further. If you now switch it on, please save and logoff the instance.

Base Set Up Switch	Action
<p>Enable Homepage v3 Configuration Migration during Upgrade via the Upgrade Center (only applicable if "Enable Homepage v3 Upgrade via the Upgrade Center" is enabled, and will cause old [Homepage v2] configuration to be migrated to the new [Homepage v3] configuration when the Homepage v3 upgrade is initiated via the Upgrade Center)</p> <p> Do not enable the switch "Enable Homepage v3 — requires "Role-based Permission (This will disable Administrative Domains)" via provisioning. This should be enabled via upgrade center only. The steps are described below.</p>	Enable

 Enabling Intelligent Services is a pre-requisite for the Home page 3 Approval requests user interface. This is described in the next section "Enable Intelligent Services".


Procedure

1. Logon to your company's instance and go to *Admin Center* from the *Home* tab. Click on the button *Upgrade Center*.
2. On the *Welcome to the SuccessFactors Upgrade Center* page, go to the section *Recommended Upgrades* and select *New Homepage*, click on *Learn more & Upgrade Now*.
3. On the new opened page, you can check the feature's details information, if everything is fine, click the button *Upgrade Now*.
4. On the next screen, click *Yes* and logoff from company's instance.

After the upgrade, please perform the following step.

1. Logon to your company's instance again and go to *Admin Center* from the *Home* tab.
2. In the *Manage Employees* portlet, select *Set User Permissions-> Manage Permission Roles*, the *Permission Role List* page opens.
3. Here is a new role called *Homepage3 Tile View* generated by instance automatically. select this role and go to the section *Grant this role to*. Under this section, select the checkbox for *Everyone (All Employees)*
4. *Save changes*.
5. Go to the permission role SAP BestPractices Super admin, click the button *Permission*. Under the *General User Permissions* please enable as below:


General User Permissions	Selection
Professional Edition Manage Workflow Requests	X

 It is not recommended to enable/Disable this feature via Provisioning. You can Undo the upgrade within 30 days after upgrade.

4.2 Enable Intelligent Services

This section describes the steps necessary to enable the Intelligent Services. For more information about the topic please refer to the link [Intelligent Services Help](#).

If the Best practices pre-configured instance is copied, then the Intelligent Services feature is already enabled and you can skip the below steps. However, if the Best Practices pre-configured instance cannot be copied, please consider the below steps for upgrading to this feature.

 This is an optional feature but enabling this a pre-requisite for Enabling Home Page V3 described above in section "Enable Home Page V3".

Provisioning Switches



Please do not use Provisioning switches for enabling this feature.

There are two Provisioning switches “Enable Intelligent Services” and “Enable Intelligent Services Center ISC” related to Intelligent Services. However, they are not to be used directly, please proceed as follows via the Upgrade center.

Procedure

1. Logon to your company's instance and go to *Admin Center* from the *Home* tab. Click on the button *Upgrade Center*.
2. Inside the Upgrade center, go to the section *Recommended Upgrades* and to *Intelligent Services* & click on *Learn more & Upgrade Now*.
3. You can see the feature details now. At the bottom, click the button *Upgrade Now*
4. On the next screen click *Yes* and logoff from the company's instance.

After the upgrade, please perform the following steps.

1. Logon to your company's instance and go to *Admin Center* from the *Home* tab.
2. Go to the permission role *SAP BestPractices Super Admin*, click the button *Permission*. Under the *Administrator Permissions*-> *Intelligent Services Tools* please enable as below:

Intelligent Services Tools	Selection
Intelligent Services Center(ISC)	X



It is not recommended to enable/Disable this feature via Provisioning. You can Undo the upgrade within 30 days after upgrade.

4.3 Enable Fiori User Experience UI

This section describes the steps to enable the Fiori User Experience UI.



This is an optional feature. If the Best practices pre-configured instance is copied, the feature is already enabled and you can skip below steps. However, if the Best Practices pre-configured instance cannot be copied, please consider the below steps for upgrading. And all test scripts delivered in this solution are described based on the new UI.

Procedure

1. Logon to your company's instance and go to *Admin Center* from the *Home* tab. Click on the button *Upgrade Center*.
2. On the *Welcome to the SuccessFactors Upgrade Center* page, go to the section *Recommended Upgrades* and select *Fiori User Experience 2016*, click on *Learn more & Upgrade Now*.
3. On the new opened page, you can check the feature's details information, if everything is fine, click the button *Upgrade Now*.
4. On the next screen, click *Yes* and logoff from company's instance.

4.4 Getting Configuration Guides

Use

All SAP Best Practices for SAP SuccessFactors Performance & Goals content is described using configuration guide. Before starting configuration, please make sure that all configuration guides have been downloaded.

Procedure

The Configuration Guides are accessible via SAP Best Practices Explorer
(https://rapid.sap.com/bp/rds_sf_pa): **Accelerators -> SAP Best Practice content library -> Solution scope -> Building block.**

In case of any changes, the latest version of these documents will be attached as attachments to the SAP Best Practices for SAP SuccessFactors Performance & Goals support **SAP note [2385227](#)**.

4.5 Getting Configuration Files

Use

SAP Best Practices for SAP SuccessFactors Performance & Goals predefines a set of templates and the templates will be used during manual configuration phase. Before starting configuration, please make sure that all of these templates have been downloaded.

Procedure

The Configuration Files are accessible SAP Best Practices Explorer
(https://rapid.sap.com/bp/rds_sf_pa): **Accelerators -> SAP Best Practice content library -> What you also need to know** section, check document **SAP SuccessFactors Align & Perform Configuration Files (File name: RDS_SF_PA_SFSUITE1711_06_Configuration Files_EN_XX.zip)**.

After Downloading, please check below files inside:

No	Files	Comments
001	Goal Plan.xml	Goal Plan Template
002	Performance and Development Plan.xml	Performance review Template
003	360 Feedback -E_EM_EH Process with Ext Raters.xml	360 Review Template
004	SuccessFactors Default Goal Library.csv	SuccessFactors default Goal library in English
005	Translated_GoalLibraries.zip	Only used if customer need SuccessFactors goal library in multiple languages
006	FormLabelKeys_PerformanceandDevelopmentPlan.csv	Translations for PM Template (Please Open with Apache OpenOffice not Excel to avoid error, see SAP note 2076045)
007	FormLabelKeys_360FeedbackE_EM_EH ProcesswithExtRaters.csv	Translations for 360 Review Template (Please open with Apache OpenOffice not Excel to avoid error, see SAP note 2076045)
008	Sample_Talent_Succession Data Model.xml	Sample Succession Data Model for talent modules



If your instance is copied from the Best Practice pre-configured instance, it is assumed that all files mentioned above have already been imported or implemented in your instance, please double check in your instance.

If you want to check the version of XML files of Performance Management/360 Management templates, please check coding `<meta-subject><![CDATA[xxxx]]></meta-subject>` on XML file, for example `<meta-subject><![CDATA[Best Practice b1711]]></meta-subject>` means the package is built based on product version b1711.

4.6 Getting Configuration Workbooks

Use

Configuration Workbook list all detailed configurations and be useful for partner to refer to during project implementation phase.

Procedure

You will check two Configuration Workbooks of this solution and the Configuration Workbooks are accessible SAP Best Practices Explorer (https://rapid.sap.com/bp/rds_sf_pa): **Accelerators -> SAP Best Practice content library -> What you also need to know.**

- SAP SuccessFactors People Profile Configuration Workbook
- SAP SuccessFactors Align & Perform Configuration Workbook

If any changes have had to be made after publication, the latest version of these documents is attached to the *SAP Best Practices for SAP SuccessFactors Performance & Goals* **SAP note [2385227](#)**.

4.7 Additional Step after Feature Enable (Optional)

Use

This section is only for the customer obtain predefined best practice content via copying from the Best Practice pre-configured instance.

After enabling the features listed in the chapter: *Enable Features in Provisioning*, please add below additional configuration.

Procedure

1. Log in to SAP SuccessFactors instance using the following link:

Link	<a href="https://<server>.successfactors.com/login">https://<server>.successfactors.com/login
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2. Go to *Admin Center* from *Home* tab. In the *Manage Processes & Cycles* portlet, select *Performance Management* → *Manage Templates*.

Click *Performance Review* tab, you can see  icon behind the pre-configured template. Click the name of the performance review template.

3. In the new screen, from the navigation on the left side, click *Validate and Approve for PM v12 Acceleration*, then on the right side, click the links of *Print list of changes* to review the compatibility changes that will be applied to your template, close the pop up browser.
4. Click *General Settings* and *Edit field and Sections* to adapt the change if necessary, when it's done, click *Update and Edit* button, in the pop up window, enter a new name, and press OK.
5. Wait the screen is refreshed and the *Update and Edit* button disappeared from the *Validate and Approve for PM v12 Acceleration* screen, click *Approve for Launch* button, in the pop up window, click *Ok* button to confirm.

4.8 Adding Standard Dashboard/Tiles into Instance (Optional)

Use

This section is only for the customer who wants to use standard dashboards/tiles and will add them into instance.

Procedure

1. Log in to SAP SuccessFactors instance using the following link:

Link	<a href="https://<server>.successfactors.com/login">https://<server>.successfactors.com/login
-------------	---

2. Go to *Admin Center* from *Home* Tab. In the *Manage Processes & Cycles* portlet, select *Reporting* → *Manage Dashboards*.
3. On Screen *Manage Dashboards*, select *Manage Standard Dashboards and YouCalc Files* → *Add From Success Store*.
4. On *Standard Dashboards and Tiles* Screen, review the standard dashboards/tiles list and click button *Add to instance* for the one which you want to reuse.
5. On *Edit Dashboard* screen, can execute mandatory modification and click *save*.
6. For the tiles which want to display on homepage, please maintain Channel *Homepage* under *Edit Dashboard* → *Availability*.



After adding, don't forget to assign permissions to relevant role via RBP (*User Permissions* → *Reports Permission* → *YouCalc Tiles And Dashboards*; *Administrator Permissions* → *Manage Dashboards / Reports* → *YouCalc Tiles And Dashboards*).

5 Evaluate Business Content/Processes

The following sections describe the activities that have to be done by the business consultant who is taking care that the business processes work as desired.

- The section *Import Employee Demo Data* describes how to use our solution predefined employee data for demo/test purpose.
- The section *Review of Business Processes* provides an overview where the business consultant can get information on the SAP Best Practices scenarios delivered in the instance.

5.1 Import Employee Demo Data

For test purposes, the solution provides some example employee data. You can find the employee example data file and import guidance via SAP Best Practices Explorer (https://rapid.sap.com/bp/rds_sf_pa): **Accelerators -> SAP Best Practice content library -> What you also need to know** section, check document SAP SuccessFactors Align & Perform Employee Upload How-To-Guide

(File name: *RDS_SF_PA_SFSUITE1711_06_HowTo_TestDataUpload.doc*).

If you want to use customer employee data to demo and test directly, you can use Employee Data Upload file (csv)'s format and maintenance customer employee data on.



If the customer is using SAP Best Practices for SAP SuccessFactors Employee Central (EC) or SAP HCM, all employee basic data will come from EC or SAP HCM. In this case there is no need to import employee basic user data anymore.

5.2 Review of Business Processes

You can find details of individual scenarios on SAP Best Practices Explorer (https://rapid.sap.com/bp/rds_sf_pa): **Accelerators -> SAP Best Practice content library**, on the Solution scope section, you can check and access the individual business scenario's *Scope item fact sheet* containing the following links:

- The Test script provides a detailed process step description of the business scenario.
- The Process diagram contains a graphical overview of the process flow.

You can use the documents as described above to review the business processes you are interested in. Use the Test script to evaluate the process in the system.

6 Security Aspects

This section provides an overview of the security-relevant information that applies to the deliverables of this solution package.

6.1 User Administration and Authentication

This section provides an overview of the users required for this solution package.

Purpose	User-ID	Created in	Initial Password	Authorization Profile	Comment
Super Admin User	User ID is defined by your System-Admin or re-use of user superuser.	Creation described in Quick Guide Preparatory Steps	Password is defined by your System Admin.	Authorization is defined by your System Admin or re-use of permission role SAP BestPractices Super_Admin	Cloud