# GM Configuration Guide - New Goal Import

# Goal Import

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## Introduction

In build b0812 (December of 2008) we introduced a new goal import feature for Goal Management. There already exists a goal import feature prior to this. This document only deals with configuration options for the new goal import feature. For details on the old import feature look at the document titled "[Objective\_Import\_Guide.doc](http://svn/viewvc/svn/documents/Configuration%20Documents/Goal%20Management/Objective_Import_Guide.doc?view=co)". The business challenges addressed by the new goal import feature include the ability to import all fields of a goal plan, improved performance, and automating scheduled goal imports.

The rest of this document provides detailed information on the behavior, and configuration of this feature.

## Comparing Old & New

The new import feature supports functionality that is not supported in the old import.

1. Ability to import the metric lookup table
2. Support for comments import
3. Support the SuccessFactors Job Scheduler application used by SuccessFactors Professional Services and Customer Service to schedule automated goal imports.
4. Manage goal alignment
5. Update goals created through the UI

As of B1207, all features available in the old import now offered with Beta Goal Import.

To support backwards compatibility the old import feature will not be removed in the foreseeable future.

## Accessing the Feature

The new goal import feature can be accessed from **Admin > Manage Goals > Beta Goal Import.**

The link to the new goal import feature is controlled using the same administrative privileges permission as the old one (i.e. you get both or you get neither together). **Admin > Manage Security > Administrative Privileges > Manage Goals > Import Goals**.
The first thing to do is to the CSV template for the goal import. Select the goal plan you want to update and click on the "Generate CSV Header" button. Save the CSV file to your machine.


### CSV File Format

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

The header column row defines what types of values should be placed in the rows beneath them. Here's a table describing the header types.

|  |  |  |
| --- | --- | --- |
| **Column**  | **Description**  | **Example**  |
| ^TYPE  | Identifies the item that the ACTION will be taken on. Valid options are: OBJECTIVE, TASK, MILESTONE, TARGET, METRICLOOKUP, OBJCOMMENT. Values are case sensitive  | OBJECTIVE  |
| ACTION  | The action to take on the item identified in TYPE. Valid options are: ADD, UPDATE, DELETE. Values are case sensitive  | ADD  |
| ID  | This is the goal's internal ID and can only be created by the SuccessFactors system. This field will be used only to identify a specific goal to be acted upon. The import creator should only add a value here if they want to modify a specific goal. The future goal export feature will automatically retrieve each goals' ID when a goal is exported.  | 12345  |
| GUID  | **Required.** This is a unique code that the import creator added to the import file to update or delete goals at a later date and time. The code will group one or more goals into one action. Example, an import file is used to push a goal to all employees in both the engineering and sales department. At a later date and time, all these goals can be updated by one import file line by specifying an action and the GUID.  | Imp123  |
| SUBGUID  | This is a unique code used to uniquely identify a row in a tablefield (TASK, MILESTONE, TARGET, METRICLOOKUP). The SUBGUID is used in the same way for tablefield rows as the GUID field is used for goals.  | Subimp123  |
| FILTER\_USERNAME  | This field is filtered against the employee USERNAME field. This field can accept multiple user names, separated by semi-colons (Description: http://confluence.successfactors.com/images/icons/emoticons/wink.gif. Keyword "ALL" to be used to select all users. Used to determine which users to great the goal for.  | msmith; cgrant  |
| FILTER\_MGR\_ID  | This field is not currently supported. A placeholder for future functionality.  |   |
| FILTER\_DEPT  | This field is filtered against the employee DEPARTMENT field. Used to determine which users to great the goal for.  | sales  |
| FILTER\_DIV  | This field is filtered against the employee DIVISION field. Used to determine which users to great the goal for.  | EMEA  |
| FILTER\_LOC  | This field is filtered against the employee LOCATION field. Used to determine which users to great the goal for.  | Paris  |
| FILTER\_CUSTxx  | This field is filtered against the employee CUSTOMXX field. NOTE: only a max of three custom fields can be used to filter goal actions. Custom fields must be defined in the data model under <custom-filters>. Used to determine which users to great the goal for.  | Any text here  |

Goal data columns always start with the string "OBJECTIVE\_" followed by the field name that the goal will act on. Columns for aoal tables (i.e. Tasks, Targets, Milestones, Metric Lookup) will start with their respective table name (TARGET\_, TASK\_, MILESTONE\_, METRICLOOKUP\_). In general, what follows will be the same as the field definition id as defined in the goal plan. For example, to update the "metric" field in the goal plan you would put a value into the "OBJECTIVE\_metric" column of the import file. Example of some, but clearly not all, goal fields that can be used in the goal import include:

|  |  |  |
| --- | --- | --- |
| **Column**  | **Description**  | **Example**  |
| OBJECTIVE\_CATEGORY  | Category ID as defined in the goal plan XML  | Financial  |
| OBJECTIVE\_PARENTID  | Used to manage goal alignment. This is the internal goal ID for the goal to be aligned up to.  | 3364  |
| OBJECTIVE\_PUBLIC  | Define if the goal will be public or private. Accepted values are (Y / N) or (1 / 0)  | Y  |
| OBJECTIVE\_name  | Maps to field-definition id="name".  | Increase Services Revenue per Account  |
| OBJECTIVE\_metric  | Maps to field-definition id="metric"  | Service Revenue per Account  |
| OBJECTIVE\_actual  | Maps to field-definition id="actual"  |   |
| OBJECTIVE\_weight  | Maps to field-definition id="weight"  |   |
| OBJECTIVE\_start  | Maps to field-definition id="start"  | 3/1/2009  |
| OBJECTIVE\_due  | Maps to field-definition id="due"  | 12/31/2009  |
| OBJECTIVE\_status  | Maps to field-definition id="state". Accepts the enum value.  |   |
| OBJCOMMENT\_comments  | Maps to field-definition id=" comments". Goal comments are added as a separate row in the CSV file with a ^TYPE of OBJCOMMENT. [See examples section](#GMConfigurationGuide-NewGoalImport-Impo).  |   |
| OBJECTIVE\_actual-achievement  | Maps to field-definition id=" actual-achievement". This field is used to calculated the goal's rating based on the metric lookup table. Value is numeric  | 500  |
| TARGET\_date  | Date column for the Target sub-goal table. Sub-goal tables require a separate row in the CSV file. [See examples section](#GMConfigurationGuide-NewGoalImport-Impo).  |   |
| TARGET\_target  | Target column of the Target sub-goal table.  |   |
| TARGET\_actual  | Actual column of the Target sub-goal table.  |   |
| OBJECTIVE\_NUMERIC\_METRIC\_LOOKUP\_TABLE  | This column appears when a goal plan is configured with both achievement and achievement-text. Accepted values are Y / N or 1 / 0. A positive value (Y, 1) represents the goal uses the achievement column and field.  | Y  |
| OBJECTIVE\_link  | Represents the URL field supported in a goal plan. Row value format is: [[URL][Label]]  | [[http://www.successfactors.com][Click here]]  |

## Understanding Goal ID, GUID, & SUBGUID

The ID, GUID and SUBGUID all specifically identify goals.

* The id uniquely identifies a goal within the goal management system. This is an optional field that is used when the import file needs to update an objective or sub-objective that does not have a GUID. The ID can be found in the Goal Search report as "Goal Id". Columns that support the goal id are "ID" and "OBJECTIVE\_PARENTID".
* The GUID and SUBGUID are unique identifiers associated to a goal in a previous goal import. A GUID may be related to one or more goals. The GUID field is mandatory for all 'add' actions. The GUID cannot be changed for a goal once created. SUBGUID uniquely identifies sub goal table entries for a goal.

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

* For add actions - The filter fields determine what goals will receive the goal. Each goal that receives the new goal will be assigned the GUID for the goal. If an employee already has a goal in their goal plan with the SAME GUID, then that employee will NOT receive a second copy of the goal and a warning message will be displayed saying how many employees did not receive a goal. This behavior will allow a company to rerun an import say monthly to make sure that employees who are captured by the filter receive the goal. NOTE: It is up to the import creator to keep goals with the same GUID in synch or run the risk of having different versions of the same goal.
* For update and delete actions - All goals that match the given GUID, SUBGUID and filter fields are updated. This means that if a GUID or SUBGUID are not given for an action, no update or delete will occur.

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

## Import File Processing

The import file is processed top down one action line at a time. As each line is processed, an action is performed (either an ADD, UPDATE or DELETE).
As each line is processed a check will be performed. If the action is invalid, a warning message is displayed identifying the problem import row and the reason for the failure.
If an action is valid, then the add, update or delete action will be performed. Each action has different behavior.
Add - The add action will add a new object which will be an objective or a tablefield row (where a tablefield is either a task, milestone, target. For the December release, SF will also support the metric-lookup table). The action will select one or more employees to receive the new object based on the specified filter fields (see the action section for more details). Each employee selected by the filter field will then receive the object. The data to be added for the object is based on the data located in each action column plus the GUID and SUBGUID. Example, an action line will add a goal to an employee. The import file header section has four headings, name, start date, due date and status. Each value in the action line that lines up under each heading section shall be used to create the goal.
NOTE: Any add action can potentially add more than one objective or tablefield row per line. Additionally, an employee will not receive the new goal or tablefield row if they already have an existing objective or tablefield row with the GUID or SUBGUID for the object being added.
Update - All goals that match the given GUID, SUBGUID and filter fields are updated. This means that if a GUID or SUBGUID are not given for an action, no update action will occur. If a field has a value of "\NULL", any data in a field will be removed and the field will remain empty. Using \NULL will wipe out data, but an error will be reported if the field is required; if the field is required, data will not be removed, as required fields cannot be left empty. Leaving a cells value blank (empty - not to be confused with \NULL) leaves data unchanged and will not overwrite with blank values.
NOTE: Employees through the UI will be able to update a goal. This means that an update done through goal import may overwrite a value that was previously updated by an employee.
Delete - All goals that match the given GUID, SUBGUID and filter fields are deleted. This means that if a GUID or SUBGUID are not given for an action, no update action will occur.

### Error Handling

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

## Examples

### Import Goal and Metric Lookup Table

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| OBJ\_PLAN\_ID  | 51  |   |   |   |   |
| OBJ\_PLAN\_NAME  | 2008 Goal Plan with everything  |   |   |   |   |
| DATE  | Thu Nov 06 17:25:41 PST 2008  |   |   |   |   |
| MAX\_ERROR  |   |   |   |   |   |
| ^TYPE  | ACTION  | ID  | GUID  | SUBGUID  | FILTER\_USERNAME  |
| OBJECTIVE  | ADD  |   | GA-006  |   | ALL  |
| METRICLOOKUP  | ADD  |   | GA-006  | MLT-001  | ALL  |
| METRICLOOKUP  | ADD  |   | GA-006  | MLT-002  | ALL  |
| METRICLOOKUP  | ADD  |   | GA-006  | MLT-003  | ALL  |
| METRICLOOKUP  | ADD  |   | GA-006  | MLT-004  | ALL  |
| METRICLOOKUP  | ADD  |   | GA-006  | MLT-005  | ALL  |

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

|  |  |
| --- | --- |
| METRICLOOKUP\_achievement  | METRICLOOKUP\_rating  |
|   |   |
| 10  | 1  |
| 20  | 2  |
| 30  | 3  |
| 40  | 4  |
| 50  | 5  |



### Import by Custom Filters

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


### Import Goal Comments

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

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| OBJ\_PLAN\_ID  | 9  |   |   |   |   |   |   |   |   |
| OBJ\_PLAN\_NAME  | 1 Test Goal Plan  |   |   |   |   |   |   |   |   |   |
| DATE  | Mon Mar 02 11:04:13 MST 2009  |   |   |   |   |   |   |   |   |   |
| MAX\_ERROR  |   |   |   |   |   |   |   |   |   |  |
| ^TYPE  | ACTION  | ID  | GUID  |   | SUBGUID  |   |   | FILTER\_USERNAME  |   |  |
| OBJECTIVE  | ADD  |   | Goal301  |   |   |   |   | cgrant  |   |  |
| OBJCOMMENT  | ADD  |   | Goal301  |   |   |   |   | cgrant  |   |  |

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

### Update Goal Created from UI

Updating a goal created through the goal plan UI can be done, but you have to get the internal goal ID to do that. The internal ID can be found under Reports > Classic Reporting > Goal Search. The column is Goal Id.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| OBJ\_PLAN\_ID  | 9  |   |   |   |   |
| OBJ\_PLAN\_NAME  | 1 Test Goal Plan  |   |   |   |   |
| DATE  | Mon Mar 02 11:04:13 MST 2009  |   |   |   |   |
| MAX\_ERROR  |   |   |   |   |   |
| ^TYPE  | ACTION  | ID  | GUID  | SUBGUID  | FILTER\_USERNAME  |
| OBJECTIVE  | UPDATE  | 3365  |   |   | cgrant  |

### Align Goals through Import

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

### Scenarios

#### Create goal through UI, update goal through import

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

1. Find the goal's internal ID (Goal Search classic report).
2. Download the import template CSV header
3. Enter a row to update the goal putting the internal goal ID in the ID column.
4. Upload the import file.

#### Create goal through import, update goal through import

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

#### Create goal through UI, add sub-goal table through import

To add sub-goal tables (Tasks, Targets, Milestones, Metric Lookup) you will need to goal's internal ID. When defining the sub-goal rows, reference the internal goal ID of the goal the sub-goal rows should be added to.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| OBJ\_PLAN\_ID  | 51  |   |   |   |   |
| OBJ\_PLAN\_NAME  | 2008 Goal Plan with everything  |   |   |   |   |
| DATE  | Thu Nov 06 17:25:41 PST 2008  |   |   |   |   |
| MAX\_ERROR  |   |   |   |   |   |
| ^TYPE  | ACTION  | ID  | GUID  | SUBGUID  | FILTER\_USERNAME  |
| METRICLOOKUP  | ADD  | 3365  |   | MLT-001  | cgrant  |
| METRICLOOKUP  | ADD  | 3365  |   | MLT-002  | cgrant  |
| METRICLOOKUP  | ADD  | 3365  |   | MLT-003  | cgrant  |
| METRICLOOKUP  | ADD  | 3365  |   | MLT-004  | cgrant  |
| METRICLOOKUP  | ADD  | 3365  |   | MLT-005  | cgrant  |

#### Create sub-goal table through import, update sub-goal table through import

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

#### Create sub-goal table through UI, update sub-goal table through import

Not currently supported.

#### Creating goals that use numeric and text achievements in the metric lookup table

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

## FAQ

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

1. This new feature is available in v10 and ULTRA versions of the application.
2. A goal can be updated using either the new or old import feature, as long as you have the GUID for that goal.
3. Goals created through the UI can be updated through the import feature (Note: this the internal goal ID which is available through the Goal Search export).
4. The read-only feature is now supported in the new and old feature. (as of b1207)
5. The new goal import can be scheduled through the SuccessFactors Job Scheduler application.
6. Group goals are supported. (as of b1207)
7. The recommended maximum number of entries to update is 100,000. This could be 100,000 goals with no sub-goals, or 10,000 goals each with 10 sub-goal entries (tasks, targets, milestones, metric lookup). This could come in the form of one row in the CSV, or 100,000 rows in the CSV.
8. The new goal import now supports the filter option of job code. (as of b1207)
9. The user name filter is the only filter which supports multiple entries in a single row (separated by semi-colons). All other filter columns only support a single entry per row.
10. When updating a goal, only the fields to be updated need to be included in the goal. Leaving values blank will not remove the data from the goal. To remove the data, place \NULL as the entry for the column.
11. Custom fields to be used as filters must be defined in the data model under <custom-filters>.
12. One goal should not be defined twice in the same CSV upload file. This means don't put one row in to add a goal and then another row to update that same goal.
13. The calculated goal rating (generated through the metric lookup table) cannot be added/updated through the import. To change or set the calculated rating set values for the actual achievement and metric lookup table.