SuccessFactors Setup Wizard
Quick Reference Guide

successfactors™
An SAP Company
Administrators are responsible for starting processes and initiating activities at key performance milestones. SuccessFactors provides administrators the tools needed to launch and manage their processes.

Through the administration Setup Wizard interface, you may:
- Quickly configure and implement system features.
- Customize the system to reflect and communicate the organization’s business processes.
- Launch processes and get your organization started using SuccessFactors.
Getting Started with the Setup Wizard

To get you up and running quickly, SuccessFactors already includes a basic review process incorporating many of your key activities, including goal setting and built-in workflows. If you think the SuccessFactors basic process works for you, simply click through the options.

1. **Getting Started**
   If you are logged into SuccessFactors as the administrator, the Setup Wizard progress bar will be displayed at the top of your Home page. Click the link to open the Setup Wizard.

2. **Admin Tools**
   You may also access the Setup Wizard by selecting Admin Tools from the drop-down menu to the right of your name.

The SuccessFactors Setup Wizard is used by administrators to configure the different features, forms, and processes to be included in the SuccessFactors instance. The Setup Wizard can be used at any point to change the system’s configuration.

Click the check boxes in the Setup Wizard to select the features and processes you wish to configure.

Click to begin the setup process. The Setup Wizard will walk you through a series of questions designed to assist you with the configurable choices for setting up SuccessFactors.

NOTE: You can exit the Setup Wizard at any point and finish at a later time by clicking Exit and Finish Later.
Goal Plan Setup

In SuccessFactors, goal setting is done using a Goal Plan. Goals help employees understand what is expected of them to be successful in their job. Goal planning is used to align the efforts of all your employees with your strategy, to make sure everyone is working on projects that support the achievement of the organization’s business goals. Using the Setup Wizard, you may select to include a Goal Plan in your configuration for all of your employees to access.

Select a Goal Plan

Employees can record their goals on a Goal Plan. You can decide which Goal Plan template you wish to use for your current goal planning cycle. Options include:

- Existing Goal Plan: If you have configured a Goal Plan, you may select it from the drop-down menu.
- Basic Goal Plan: Consider a Basic Goal Plan if your company is just starting to set goals and is looking for a simple and straight-forward method to manage goals. The Basic Goal Plan requires minimal goal detail and allows for flexibility across the organization to get your goals into the system and begin tracking them.
- Extended Goal Plan: If your company has established goal setting processes and you would like to record more granular information about each goal, the Extended Goal Plan allows employees to enter additional levels of detail regarding the elements that make up the goal and track progress on achieving results.

Define Start and End Dates

Specify the dates you want the Goal Planning cycle to start and end.

Start Date: 01/01/2013  End Date: 12/31/2013

Each Goal Plan covers a specific time period, usually one calendar year. You can have your goal planning cycle match your annual review cycle so that goals can be evaluated at the end of the year. TIP: Having the goal planning cycle match the performance review cycle ensures that valid goals are automatically included in the performance review form.

Setup a Future Goal Plan

Do you want to set up a future Goal Plan?

- No, not yet.
- Yes, I want to use a future Goal Plan

Specify the date range for future Goal Plan:

Start Date: 01/01/2014  End Date: 12/31/2014

Create a copy of the future Goal Plan based on my current Goal Plan

You may configure additional Goal Plans for future performance cycles. Do this if your next cycle is just around the corner and you want employees to start recording new goals soon. Prior to finalization, you can review the Goal Plan and customize its general settings, categories, and fields.

You’ve finished designing the Goal Plan! Now What?

When finished configuring your Goal Plan(s), click to move to the next section of the Setup Wizard. NOTE: You can use Admin Tools to make changes to your Goal Plan(s) after completing the Setup Wizard.

QUICK TIP: Need to make changes to the Goal Plan? Go to Admin Tools > Goal Management. Consider updating the instructions on the Goal Plan by clicking the Manage Templates link to update the instructions, field labels, and other details on the Goal Plan.
Performance Review Setup

SuccessFactors lets you design your own performance review form. Use the Setup Wizard to select the performance related options to include in the form based on your performance process. To keep things simple; you can use the pre-configured selections in the Setup Wizard. To get started, review the table below and select which options you are prepared to create.

**Name the Review Form**

When naming the review form, you might want to provide a descriptive name like 20XX Performance Review Form. Using a name that includes the year (calendar, fiscal, or academic) helps with trending and reporting. Consider also following the same format you used with the Goal Plan name.

**Select a Rating Scale**

Rating scales can be used during the evaluation process to quantify reviewers’ perspectives on an employee’s performance. You can create new rating scales as your business needs change as well as modify or customize the content of the rating scales. NOTE: Changes to rating scales will appear when a new form is created and will NOT apply to forms that already exist.

**Adding Company Values**

Company Values are the competencies that everyone in the company should have. They often reflect your company culture or mission statement. If selected, these values become part of the performance evaluation of all employees in the organization.

**Choose Participants**

Next, specify the people who will receive the review forms and the order that they will receive them. Your selections will create a workflow for moving the form through the review process. NOTE: Regardless of your selection, you will have an opportunity to edit the form’s workflow or add your own workflow using Admin Tools > Performance Management > Manage Routemaps.

**Edit Rating Scales**

When the Change link is clicked (above), the Edit Rating Scale window opens.

**QUICK TIP:** Part of the performance review process setup is determining who will participate in the review and how the review will be conducted. In SuccessFactors, workflows help you capture how the performance review form is going to move from one participant to another. Workflows control participants’ access and who may see the form at any given point. The steps are controlled by user actions pushing a form through the process or time events that occur at specific intervals or on specific dates during the process.
Performance Review Setup

The performance review process links objectives and rewards, provides a better understanding of evaluation standards, helps identify and reward good performance, and improves visibility into performance. It provides constructive, behavioral based feedback, agreement on how personal attributes and actions influence performance (e.g., knowledge, work style), and what the individual will do differently in the future to improve.

Adding Job Roles

Each job role has a unique set of competencies. Competencies are the skills, knowledge, and experience required to excel in the role. Try the general roles preselected if you don’t have any of your own yet.

Adding a Job Family

Choose a job family to add to your instance. Click the name to see a review of the role.

Include Goals in the Review

When you include goals in the review, employees can be rated on how well they completed the goals they set on their Goal Plans. Select the type of Goal Plan that you want to use:

- **Existing Goal Plan**: Select an existing Goal Plan from the drop-down menu.
- **Basic Goal Plan**: Includes the SMART goal wizard and the SuccessFactors goal library.
- **Extended Goal Plan**: Basic Goal Plan plus balanced scorecard categories, sub-goals, and milestones.

Include Development Goals

The development plan section will let employees and managers enter and discuss development goals while the evaluation is fresh in their minds.

Schedule the Review Start Date

Pick the date that the review form will go out to the company. You can change the date at a later time, but setting a date now lets you plan your rollout activities. To get you started, we’ve picked a date that’s 30 days out.

QUICK TIP: You can edit job role information, including adding and/or removing job specific competencies by clicking on a job role link. In the Edit Role window you can edit the role name, job code, and description, and select the competencies assigned to the role.
360° Review Setup

The Setup Wizard lets you design your 360° form. Enter information about your 360° review process and the Setup Wizard will incorporate it in your personalized 360° form. To keep things simple, you may select to use the pre-configured selections in the Setup Wizard. To get started, review the table below and select which options you are prepared to create.

Name the 360° Form

When naming the 360° form, you might want to provide a descriptive name like 20XX 360° Review Form. Using a name that includes the year (calendar, fiscal, or academic) helps with trending and reporting.

Select a Rating Scale

Rating scales can be used during the 360° review process to quantify reviewers’ perspectives on employees’ performance. NOTE: Changes to rating scales will appear when a new form is created and will NOT apply to forms that already exist.

Adding Company Values

Company values are the competencies that everyone in the company should have. They often reflect your company culture or mission statement. If selected, these values become part of the 360° review.

Choose Participants

How will employees participate?

Next, specify who will receive the 360° forms and how they will participate in the review process. Your selections will create a workflow for moving the form through the review process. NOTE: Regardless of your selection, you will have an opportunity to edit the form’s workflow or add your own workflow using Admin Tools > 360° Reviews > Manage Routemaps.

Edit Rating Scales

When the Change link is clicked, the Edit Rating Scale window opens.

QUICK TIP: The SuccessFactors 360° review collects feedback from multiple sources to provide a more objective and complete picture of how an employee interacts with others in the company. The 360° review helps managers understand where the employee is doing well and where there are potential areas of improvement. Doing a 360° review in the middle of a performance period can help the employee make mid-course corrections by further maximizing their strengths and addressing weaknesses.
360° Review Setup
As part of the setup of the 360° form you can select what feedback providers will be able to rate and comment upon. This can include core values and competencies specific to the employee's role.

→ Adding Job Roles

Each job role has a unique set of competencies. Competencies are the skills, knowledge, and experience required to excel in the role. Try the general roles preselected if you don't have any of your own yet.

→ Adding Job Families

You've finished designing the 360° form! Now What?
Prior to finalization, you can review the 360° form and customize its general settings, fields, and sections.
- Click See My Review Form to review and edit the sample 360° form.
- Click General Settings to edit the foundational pieces of your template (e.g., form name, routemap, scales).
- Click Edit Fields and Sections to add sections and edit information in each form section.
- Click Save. NOTE: You can use Admin Tools to make changes after completing the Setup Wizard.

Schedule the 360° Review Start Date

Pick the date that the 360° form will go out to the company. You can change the date at a later time, but setting a date now lets you plan your rollout activities.
Compensation Setup

Compensation planning lets you budget and plan compensation updates for employees. Compensation planning is integrated with performance management to calculate suggested pay increases. This integration promotes a true pay-for-performance culture within your organization. Take the next few steps to personalize who will be involved, pick what values they will adjust, and set the budgets and guidelines for your compensation planners. To keep things simple, you may select to use the pre-configured selections in the Setup Wizard to quickly create an effective compensation plan and worksheet.

→ Name the Comp Worksheet

Choose a descriptive name like 20XX Compensation Plan. Using a name that includes the year (calendar, fiscal, or academic) helps with trending and reporting.

→ Select Compensation Fields

Select the type of compensation planning you want to include on the worksheet.

- Merit Increase (Increase the current base salary)
- Lump Sum Bonus (Cash bonus)
- Promotion (Increase based on a promotion to a new role)

Select the type of employees and the type of compensation planning you want to include in the compensation planning worksheet.

→ Budget Limits

Set up a budget for each type of increase.

- Merit Increase: 3.5%
- Lump Sum Bonus: 5%
- Merit + Lump Sum
- Promotion

What should happen if a manager submits a compensation worksheet?

- Show a warning but allow them to submit the worksheet.
- Don’t allow them to submit the worksheet.

Next, set up a budget for each of the selected increase types. NOTE: All budgets are defined as a percentage of the current salary.

→ Choose Participants

Specify the people who will receive the compensation plans and the order that they will receive them.

Next, specify the people who will receive the compensation plans and the order that they will receive them. Your selections will create a workflow for moving the plan through the review process. NOTE: Regardless of your selection, you will have an opportunity to edit the form's workflow or add your own workflow using Admin Tools > Compensation > Manage Routemaps.

→ Include Performance Ratings

Do you want to include performance ratings on the worksheet?

- Yes
- No

Performance ratings are used to drive salary increase and bonus recommendations. The performance review forms you select will determine the performance ratings that compensation planners see, and the rating scale for any ratings-based guidelines you provide.
Compensation Setup
Using the Setup Wizard you will select options related to your compensation process. The Setup Wizard will create a compensation plan template that will incorporate the options you have selected.

→Merit Guidelines

<table>
<thead>
<tr>
<th>Rating</th>
<th>Minimum</th>
<th>Default</th>
<th>Maximum</th>
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<tbody>
<tr>
<td>− to &lt; 1</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>≥ 1 to &lt; 2</td>
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<td>0%</td>
<td>2%</td>
</tr>
<tr>
<td>≥ 2 to &lt; 3</td>
<td>1%</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>≥ 3 to &lt; 4</td>
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<td>8%</td>
</tr>
<tr>
<td>≥ 4 to ≤ 5</td>
<td>3%</td>
<td>6%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Guidelines provide planners with recommendations for the adjustments to be entered in the compensation worksheet. Leveraging guidelines provides a systematic way to enforce standardized guidelines across the organization, to drive budget and company pay-for-performance culture standards across all teams.

→Bonus Guidelines

<table>
<thead>
<tr>
<th>Rating</th>
<th>Minimum</th>
<th>Default</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>0%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>2.0</td>
<td>1%</td>
<td>2.5%</td>
<td>4%</td>
</tr>
<tr>
<td>3.0</td>
<td>2%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>4.0</td>
<td>3%</td>
<td>5.5%</td>
<td>8%</td>
</tr>
<tr>
<td>5.0</td>
<td>4%</td>
<td>7%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Select whether or not to provide guidelines for bonuses.

You’ve finished designing the Compensation Worksheet!
Now What?

You’ve finished designing your compensation planning process. If you need to make adjustments to your compensation planning template, you can do so by going to Admin > Compensation > Manage Compensation Plan Templates, and selecting your new template (e.g., 2013 Compensation Plan).

QUICK TIP: When you are ready to launch the compensation planning process:
• Check the Compensation Management Permissions to ensure the right people will have access to the form to participate.
• Select Launch Compensation Forms to update the schedule or launch the forms for your managers.
Add Employees Setup

User accounts in SuccessFactors provide your employees access to SuccessFactors. Every employee must have a user account to use SuccessFactors. To begin, you will select how you will add employees to the system to create user accounts.

How will you add Employees?

- Add employees one at a time
- Upload an employee data file

In SuccessFactors, you can select to add your employees one by one or add multiple employees at a time by uploading a data file with their employee information. NOTE: Regardless of your selection, you can add and edit user accounts at any point using Admin Tools > Update User Information > Manage Users.

Add Employees One at a Time

Add New User

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Job Profile</th>
<th>Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ali Kader</td>
<td><a href="mailto:sfstest@successfactors.com">sfstest@successfactors.com</a></td>
<td>Individual Contributor</td>
<td>AlexE</td>
</tr>
<tr>
<td>Admin Account</td>
<td><a href="mailto:sfstest@successfactors.com">sfstest@successfactors.com</a></td>
<td>Administrator</td>
<td>No Al</td>
</tr>
<tr>
<td>Alan Lake</td>
<td><a href="mailto:sfstest@successfactors.com">sfstest@successfactors.com</a></td>
<td>Manager</td>
<td>Carla</td>
</tr>
<tr>
<td>Alexis Johnson</td>
<td><a href="mailto:sfstest@successfactors.com">sfstest@successfactors.com</a></td>
<td>Manager</td>
<td>Payto</td>
</tr>
<tr>
<td>Alice Fang</td>
<td><a href="mailto:sfstest@successfactors.com">sfstest@successfactors.com</a></td>
<td>Individual Contributor</td>
<td>Mand</td>
</tr>
<tr>
<td>Amy Sounds</td>
<td><a href="mailto:sfstest@successfactors.com">sfstest@successfactors.com</a></td>
<td>Engineering Manager</td>
<td>AlexE</td>
</tr>
<tr>
<td>Andrea Tocas</td>
<td><a href="mailto:sfstest@successfactors.com">sfstest@successfactors.com</a></td>
<td>Individual Contributor</td>
<td>Benja</td>
</tr>
<tr>
<td>Ben Thompson</td>
<td><a href="mailto:sfstest@successfactors.com">sfstest@successfactors.com</a></td>
<td>Individual Contributor</td>
<td>AlexE</td>
</tr>
<tr>
<td>Benjamin Lee</td>
<td><a href="mailto:sfstest@successfactors.com">sfstest@successfactors.com</a></td>
<td>Manager</td>
<td>Darlin</td>
</tr>
<tr>
<td>Beby Brown</td>
<td><a href="mailto:nltlile@successfactors.com">nltlile@successfactors.com</a></td>
<td>Individual Contributor</td>
<td>Carla</td>
</tr>
<tr>
<td>Bill Miltz</td>
<td><a href="mailto:sfstest@successfactors.com">sfstest@successfactors.com</a></td>
<td>Individual Contributor</td>
<td>Marc</td>
</tr>
<tr>
<td>Carla Grant</td>
<td><a href="mailto:sfstest@successfactors.com">sfstest@successfactors.com</a></td>
<td>Executive</td>
<td>Danel</td>
</tr>
<tr>
<td>Carolyn Fields</td>
<td><a href="mailto:sfstest@successfactors.com">sfstest@successfactors.com</a></td>
<td>Individual Contributor</td>
<td>Benja</td>
</tr>
</tbody>
</table>

When adding employees one at a time, start by adding users from the very top of your organization (such as the owner or CEO), then go down the hierarchy. This way, manager information for each new user is readily available, saving you time and effort.

Upload Employee Information

Step 1: Download Employee File

If this is your first time uploading employee information, download the Employee File.

Download Employee File

Step 2: Enter employee information

Fill out the Employee File with employee details. Be sure to stick to the required format.

Step 3: Upload Employee File

When you’ve added all your employees into the file, come back to SuccessFactors and upload the Employee File.

When entering multiple employees at one time, start by entering all of your employee information into the Employee File, a spreadsheet template that can be uploaded into the system. NOTE: SuccessFactors requires the Employee File in a particular format. Do not change the order of the columns or the names of the columns. It is also important that you retain the first two rows of the template and add your data from the third row onwards.

QUICK TIP: To quickly add users into SuccessFactors, you only need to enter their basic user information to get started. You can always add more details later. When you complete each row, the user is immediately saved and added to the system.
Prepare for Rollout

Use the Setup Wizard to prepare a personalized Rollout Program to build awareness in your company about your new review process, to ensure successful adoption of the system. The SuccessFactors Rollout Program includes all the guidelines, tools, and training materials you need to make employees comfortable and familiar with the upcoming changes.

We suggest that you start the Rollout Program at least 30 days before the review cycle starts. That way, you’ll have enough time to train your employees on the new review process and it’s not so far in advance that employees forget the training.

**Countdown to Review Rollout**

- **3 Weeks before launch**
  - Send out executive announcements
    - Get your top executive to introduce the new review process.
  - Send out HR announcements
    - Have the HR team follow the executive message.
  - Start training sessions
    - Introduce new program, benefits, and managers first. Then hold sessions for employees.
  - Send out follow-up emails
    - Recap key training points, resources, and training materials.

- **2 Weeks before launch**
  - Send out Welcome message
    - Welcome employees to the SuccessFactors information in the message. In the next few days.

- **1 Day before launch**
  - Send out executive announcements
    - Get your top executive to introduce the new review process.

The countdown schedule shows when you want to start communicating the review process to your company and provides sample communications and training materials which you can customize.

**Compensation Planning Rollout**

- **Preparation:**
  - Complete your annual review cycle
    - This will ensure that performance ratings are accurate.
  - Launch a test compensation worksheet
    - Create a worksheet for one test manager, planning only option in the Launch Compensation tool.

- **Manage:**
  - Launch compensation worksheets
    - Do this for all managers with the Launch Compensation tool.
  - Export compensation data for your HRIS
    - The Compensation Export tool is the official compensation process.
  - Update employee profiles
    - Once the worksheets have been completed, decide to use the Store Compensation Data.

- **Complete:**
  - Publish compensation statements
    - You can build and launch Personal Compensation statements.

**Personalize Welcome Message**

As an administrator, you can edit the system’s Welcome message directly from your Home page and everyone will see the updates on their Home pages. Click the right of the Welcome title to open the text editor and edit the message.

**Personalize Welcome Email**

You can send and edit personalized Welcome messages to individual users or groups of users using Admin Tools.

**QUICK TIP:** Click the Send User Welcome Email link to send an email notification to a system user or group of users. The email subject and body have been pre-filled with the default Welcome message, which you can edit in E-Mail Notification Templates Settings under the Goal Management, Performance Management, 360° Reviews, and Company Settings sections of Admin Tools.
Finish

Everything you configured in the Setup Wizard is available in Admin Tools. Going forward, you will find it faster and easier to use Admin Tools to update your configuration without having to run through all of these steps in the Setup Wizard.

Review your Selections

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<thead>
<tr>
<th>Performance Reviews</th>
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<tbody>
<tr>
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</tr>
<tr>
<td>Workflow</td>
<td>Self Assessment &gt; Acknowledgement &gt; 1.5 Rating Scale</td>
</tr>
<tr>
<td>Rating Scale</td>
<td>Yes (Acting Decisive)</td>
</tr>
<tr>
<td>Use Company Values</td>
<td>Yes (Acting Entrepreneurial)</td>
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<tr>
<td>Use Job Role Competencies</td>
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<td>Goal Plan</td>
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<tr>
<td>Development Goal Plan</td>
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<td>01/13/2013</td>
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<table>
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<tbody>
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<td>360 Form Name</td>
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<tr>
<td>360 Workflow</td>
<td>Employee nominated Completed</td>
</tr>
</tbody>
</table>

Take a few moments to review your selections in the Summary.

Congratulations!

You've successfully set up SuccessFactors to use your new review process!

Your review form "2012 Annual Review" is scheduled to go out on 01/13/2012.

Schedule 360 Review Launch

What's Next?

- Go to the Admin Home page, your starting point for managing SuccessFactors.
- Learn more about frequent administration activities.
- Visit the Customer Community, a place for you to network with other SuccessFactors users.
- Refer a friend to SuccessFactors and earn rewards.

You've successfully set up SuccessFactors to use your new review process! Depending on your selections, you may be prompted to schedule the launch of forms not currently scheduled.

1. Under What's Next, you can click the links to:
   - Go to the Admin Home page
   - Learn more about frequent administration activities
   - Visit the Customer Community
2. When ready to leave the Setup Wizard, click Exit

Quick Tip: If you do chose to re-run the Setup Wizard:

- You may select to use the existing Goal Plan or create an additional Goal Plan.
- You may create additional performance review forms. Do not name them the same as your first form.
- You may create additional 360° forms.
- You may create additional compensation plans.
- You may add or edit employees. Employees you entered are not overwritten.

You've finished the Rollout!

After you have finished configuring your system, you can return to the Setup Wizard at any point to adjust your configuration by clicking the link in the Setup Wizard portlet on your system Home page.

Admin Tools provides additional resources for updating your configuration. You can also setup mobile access to the system for your users.

QUICK TIP:

- You may select to use the existing Goal Plan or create an additional Goal Plan.
- You may create additional performance review forms. Do not name them the same as your first form.
- You may create additional 360° forms.
- You may create additional compensation plans.
- You may add or edit employees. Employees you entered are not overwritten.