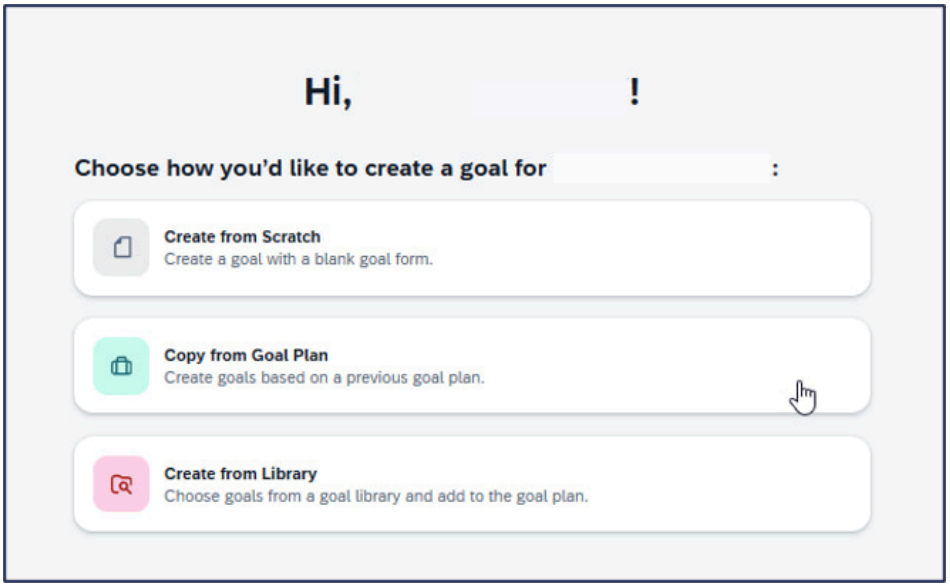
SAP SuccessFactors

CREATING GOALS FOR CPM PLANNING

Supervisors have 3 options to create goals for their employees.



1 CREATE FROM SCRATCH

This option allows you to make up your own goal and assign any metrics you want.

2 COPY GOAL

This option allows you to copy a goal from any of the previous goal plans for that employee.

Copy from Goal Plan – This option is only available in the Goal Plan. This allows you to copy a goal from any of the previous Goal Plans for that employee. NOTE: You cannot copy a goal from a different employee.

3 LIBRARY GOAL

This option allows you to select a goal from an organized library with suggested metrics.

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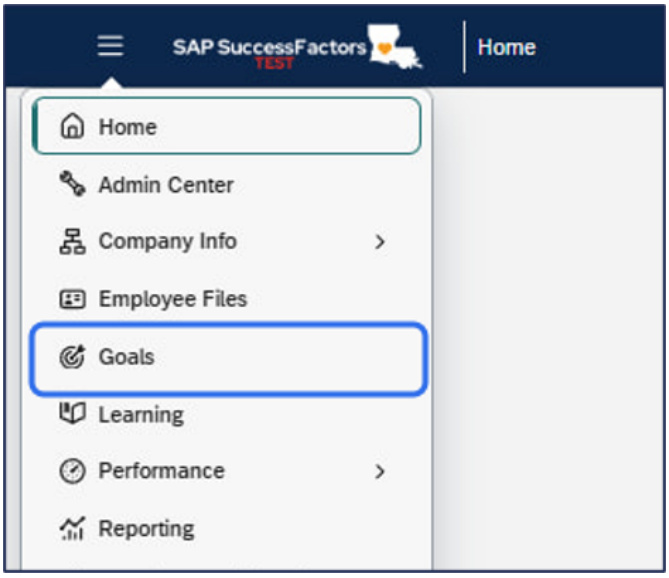
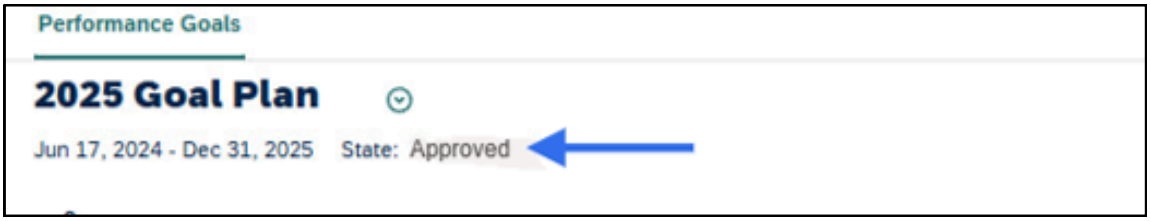
HOW TO ADD GOALS

Goals may either be added through the Goal Plan or directly to the CPM Form.

1 OPTION 1 - USE GOAL PLAN

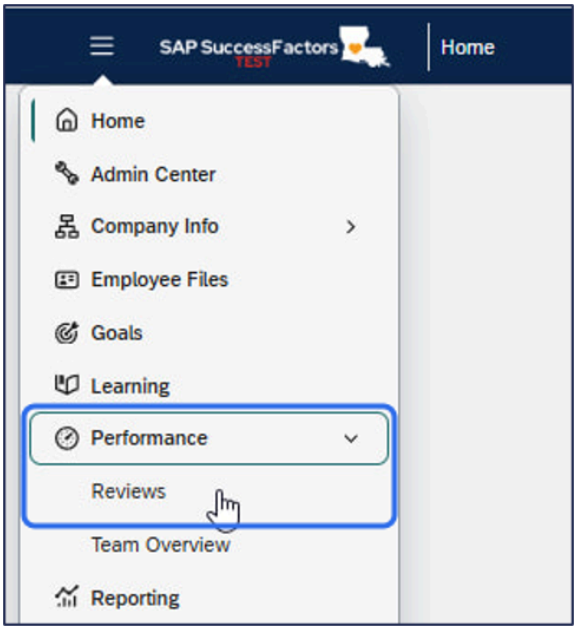
- From the Main Menu, select **Goals** to access a **Goal Plan**.
- Click on the **name** of the employee whose Goal Plan you want to access.
- Select the **year** for which you are planning.
- The Goal Plan also displays the **Goal State**. While the Goal Plan is **Unapproved**, supervisors can add, edit, copy, or delete goals.

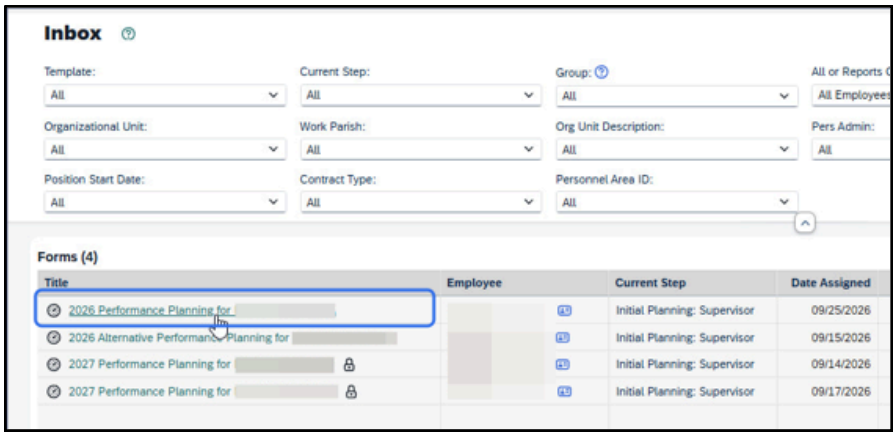




2 OPTION 2 - ADD TO CPM FORM

- Select **Performance** then **Reviews** in the **Main Menu**.
- Open the correct CPM form in your inbox.





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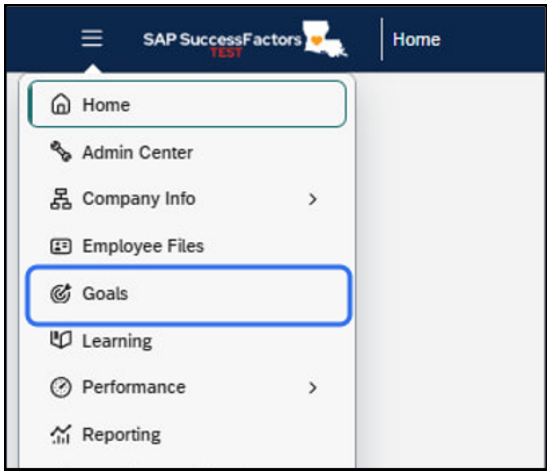
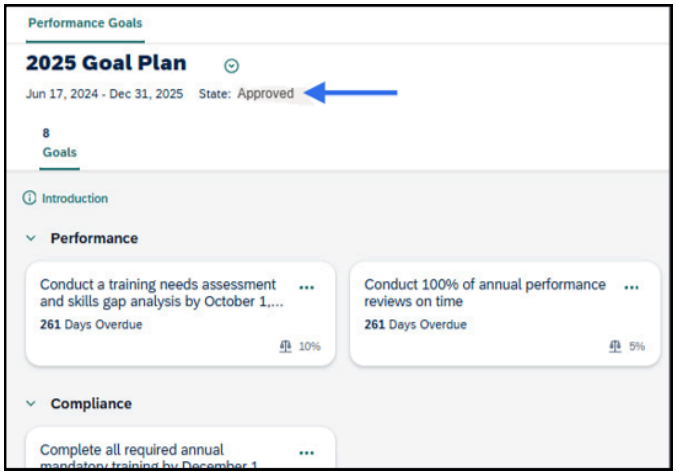
HOW TO COPY GOALS FROM PREVIOUS YEARS

While goals may either be added through the Goal Plan or directly to the CPM Planning Form, **you can only copy goals through the Goal Plan**.

1 NAVIGATE TO THE GOAL PLAN

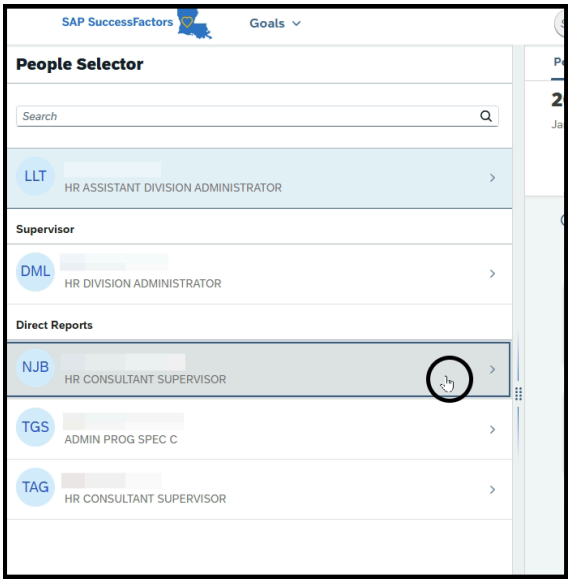
Click **Goals** in the **Main Menu**. Your Goal Plan appears as the default page view. The **Goal State** appears at the top of the Goal Plan.





2 SELECT THE EMPLOYEE

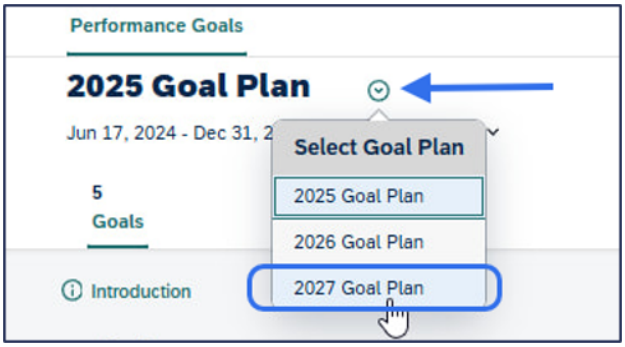
Click on the **employee** whose Goal Plan you want to work with.



You cannot copy a goal from one employee's goal plan to a different employee.

3 SELECT THE PERFORMANCE PLANNING YEAR

Select the **Goal Plan year** for the year you are planning.



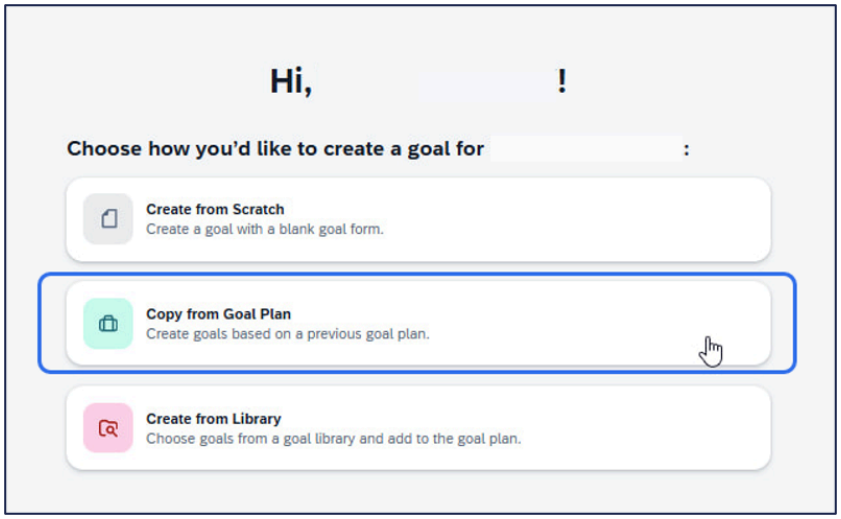
4 CREATE GOAL

Click **Create Goal** at the top right of the screen.



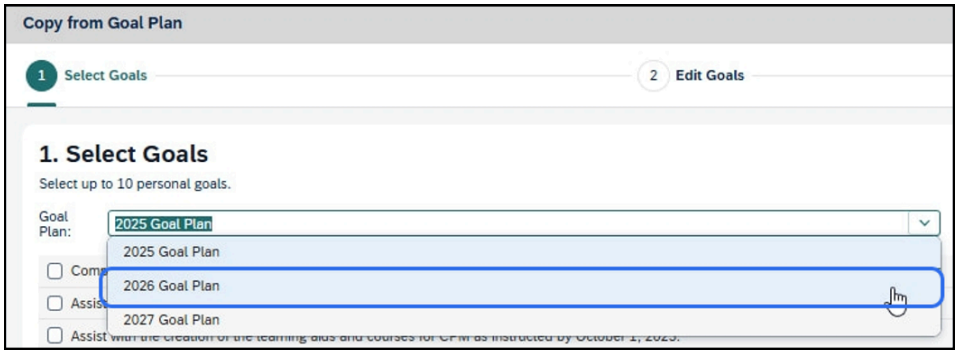
5 SELECT COPY

Select **Copy** from **Goal Plan**.



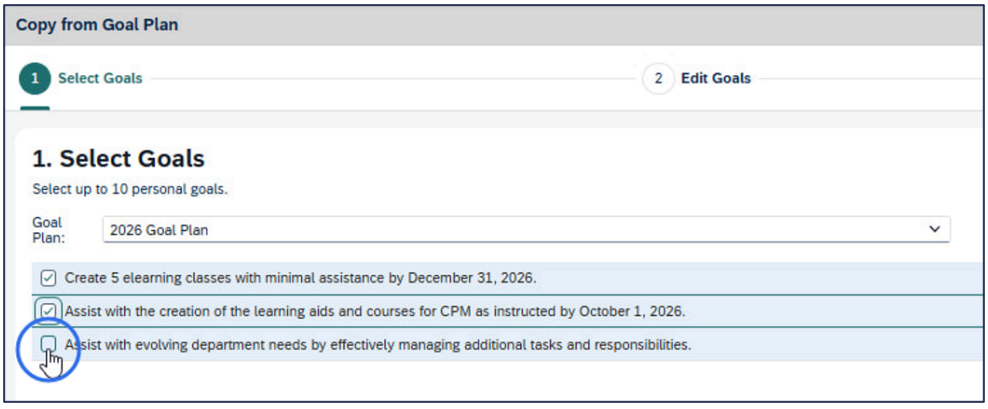
6 SELECT GOAL PLAN

Use the dropdown to select the **Goal Plan year** from which you want to copy. Then, select **Next**.



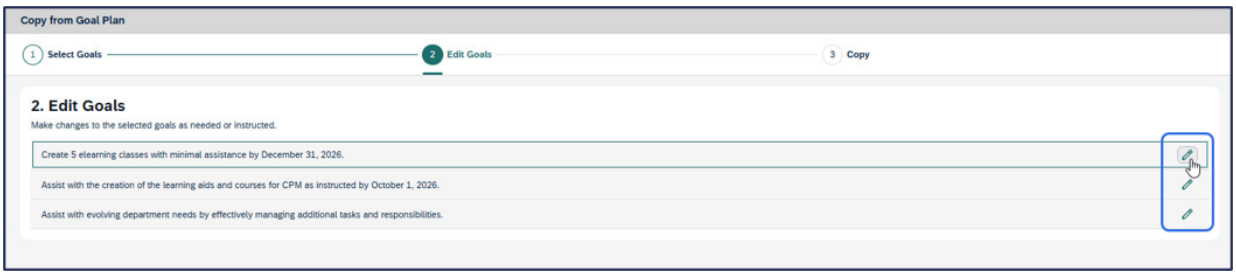
7 SELECT GOALS

Select the goals you want to copy. Then, select **Next**.



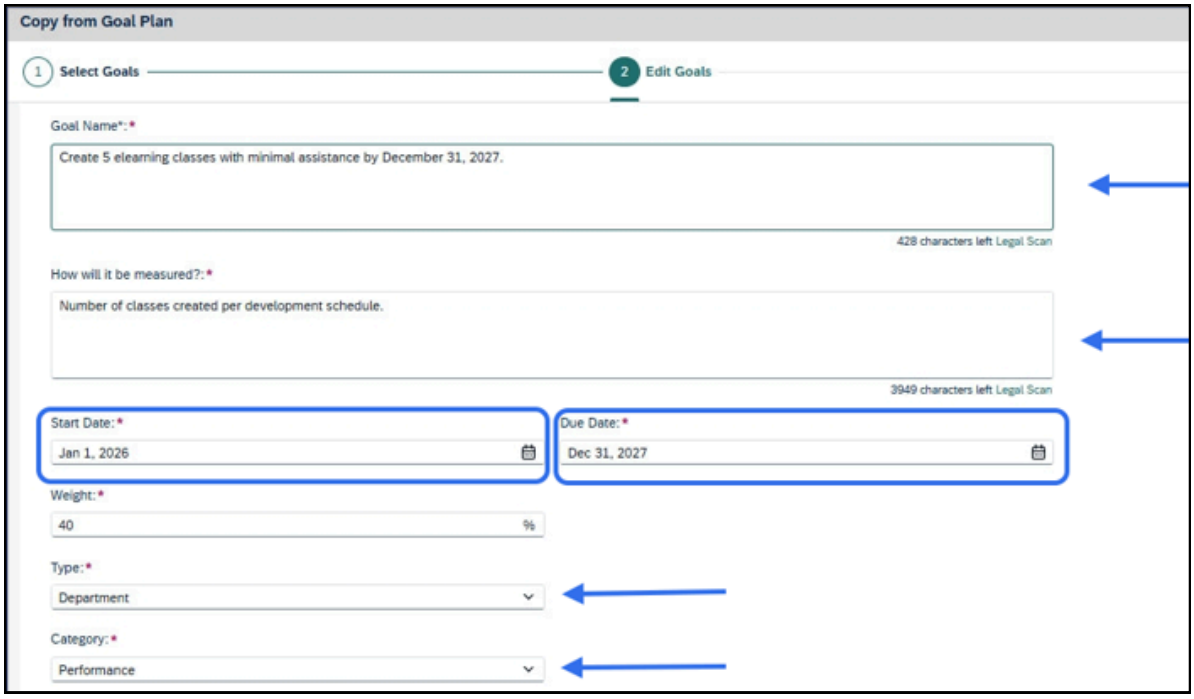
8 EDIT GOALS

You must **edit** each goal individually to continue in the copying process. Select the **pencil icon** to edit the goal(s).



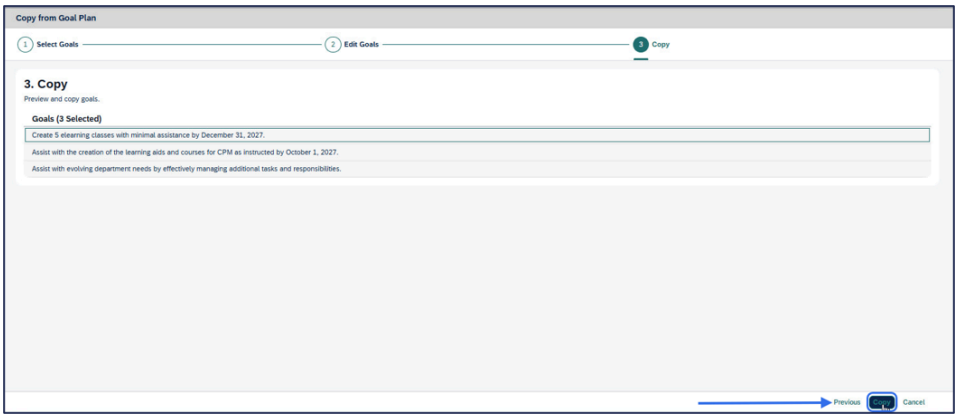
9 EDIT GOAL DETAILS

- Edit any fields as needed.
- Change **any dates** in the Goal Name, metric, and Start/Due Date.
- Check the **Type** and **Category** fields and correct, as necessary.
- Then, select **Next** to return to the Select Goals step.



10 COPY & FINISH

- Select **Copy**.
- The goal has been added to the current Goal Plan and Planning Form.



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HOW TO CREATE GOALS FROM SCRATCH

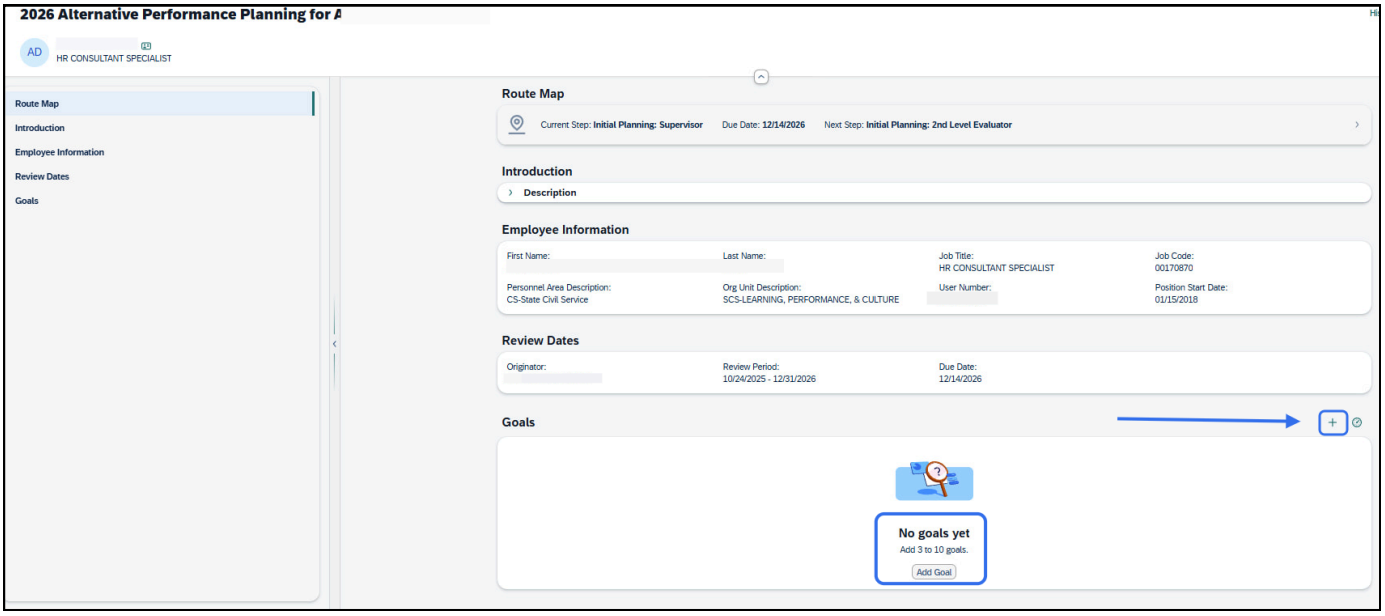
This option allows you to write your own goals and metrics.

1 SELECT CREATE GOAL

On your employee's Goal Plan, select **Create Goal.** This will add the goal to both the Goal Plan and the CPM Planning Form.

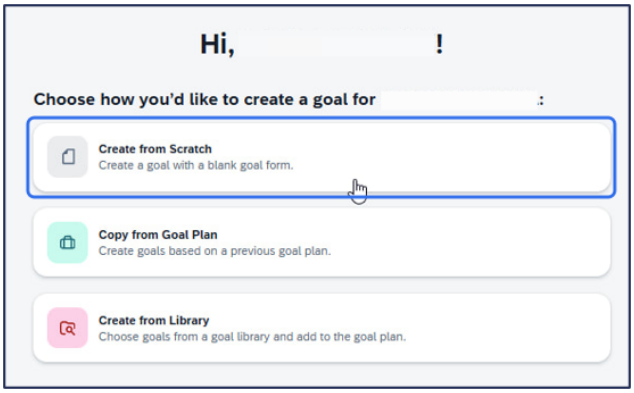


From the CPM Planning Form, select **Goals** or scroll down to the Goals section of the form. Select the **+ sign** to add a goal or, if no goals have been added, select the **Add Goal button** at the bottom of the section.



2 SELECT CREATE FROM SCRATCH

- Select **Create from Scratch.**
- This option is also available if you are creating goals in the CPM Planning Form.



3 ADD GOAL DETAILS

Add **Goal Name.**

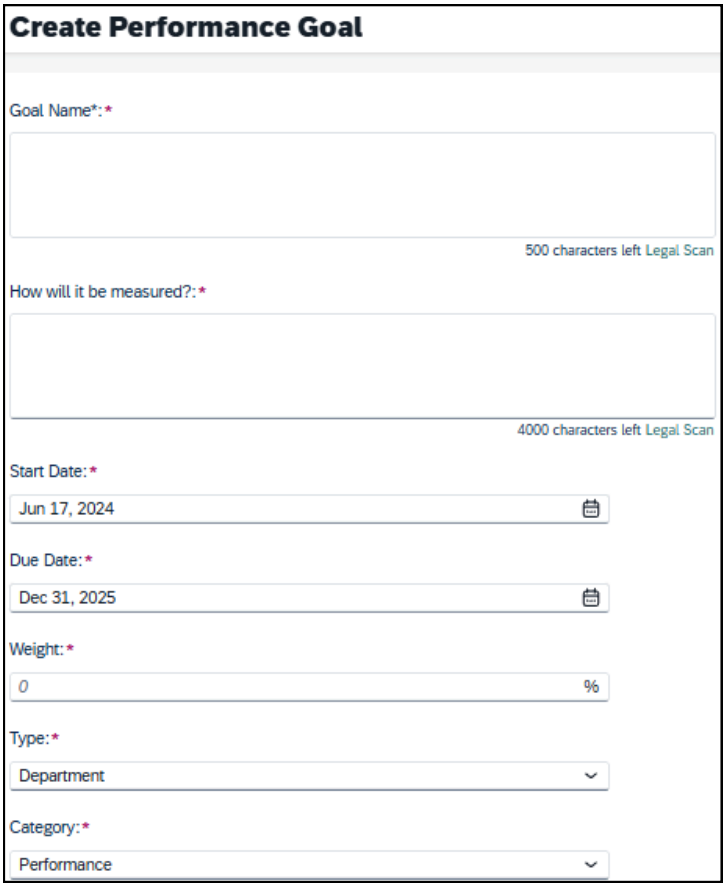
Add **Metric.**
*Metric is required. This explains how the goal will be measured.

Change **Start Date/Due Date.**

Add **Weight** of Goal.
*The total weight must equal 100%.

Select **Type**.

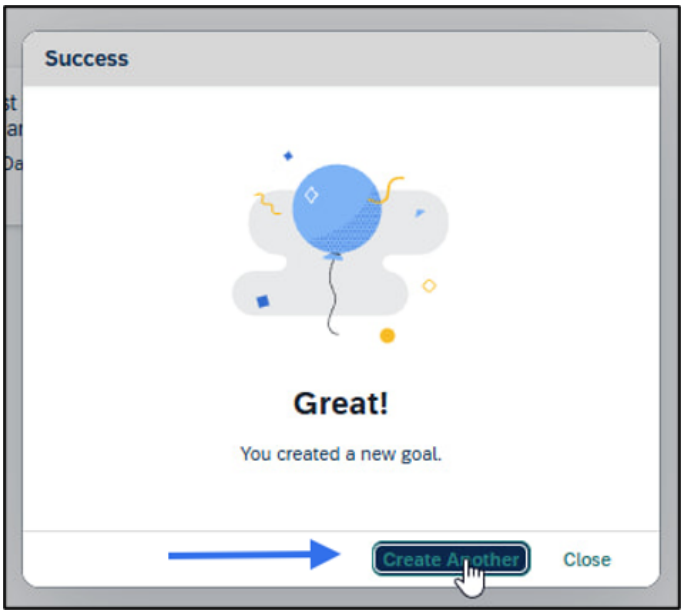
Select **Category**.



Additional details about each option can be found in the **CPM Guide for Supervisors** available on the SCS CPM Training Center webpage.

4 SELECT SAVE

- After you have completed all of the fields, select **Save** at the bottom right of the screen.
- A confirmation message pops up to confirm the creation of the goal. Select **Create Another** to return to the goal creation options screen.



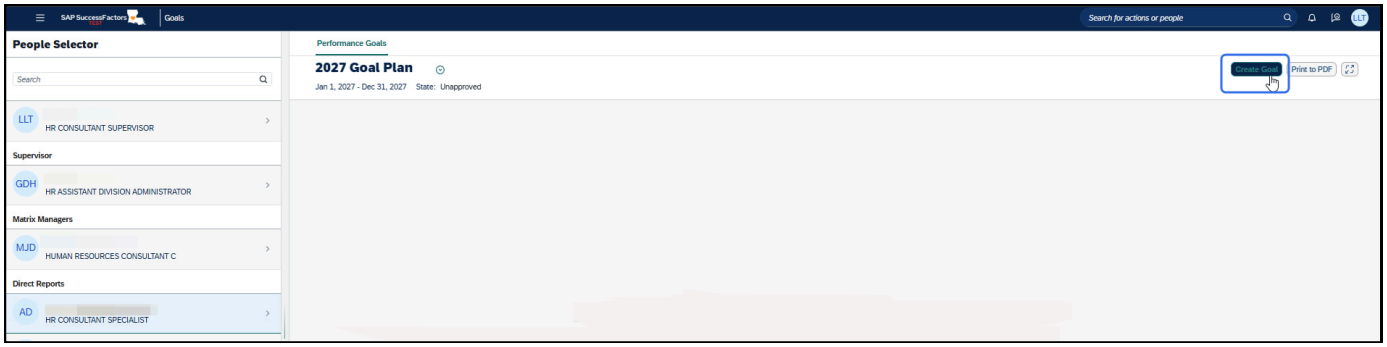
SAP SuccessFactors

HOW TO CREATE LIBRARY GOALS

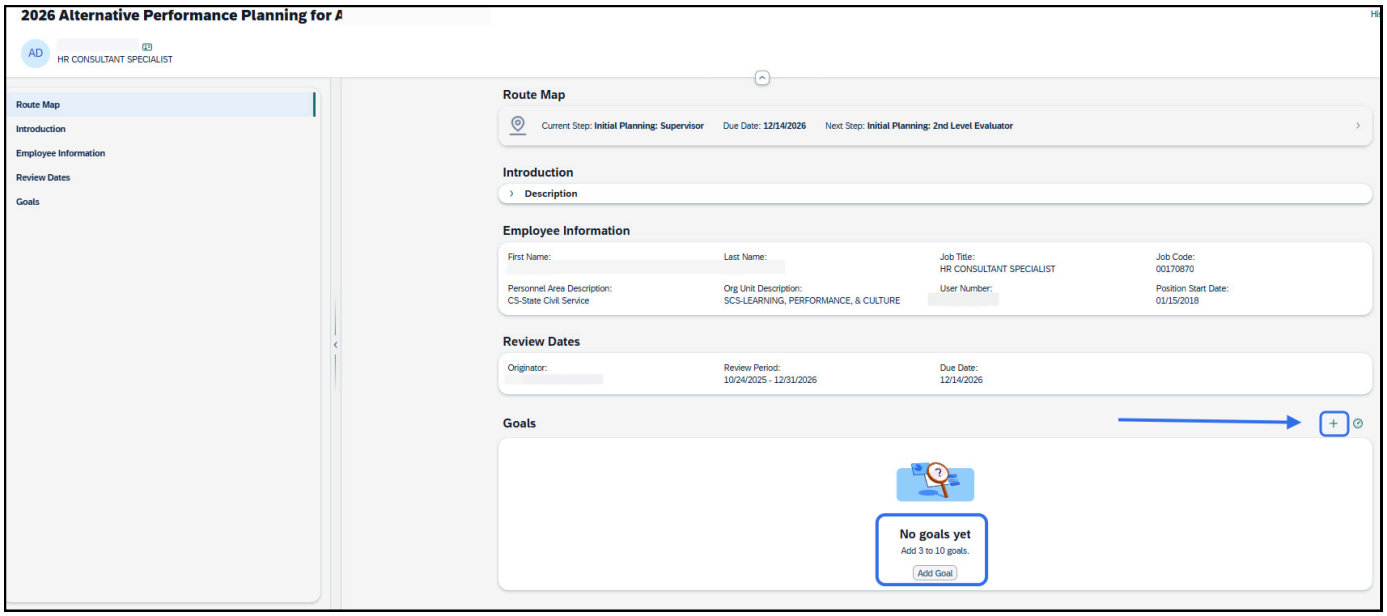
This option allows you to select goals from an organized library with metrics.

1 SELECT CREATE GOAL

On your employee's Goal Plan, select **Create Goal.** This will add the goal to both the Goal Plan and the CPM Planning Form.

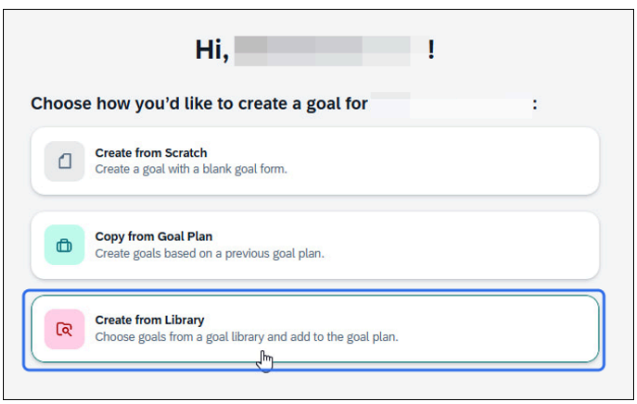


From the CPM Planning Form, select Goals or scroll down to the Goals section of the form. Select the **+ sign** to add a goal or, if no goals have been added, select the **Add Goal button** at the bottom of the section.



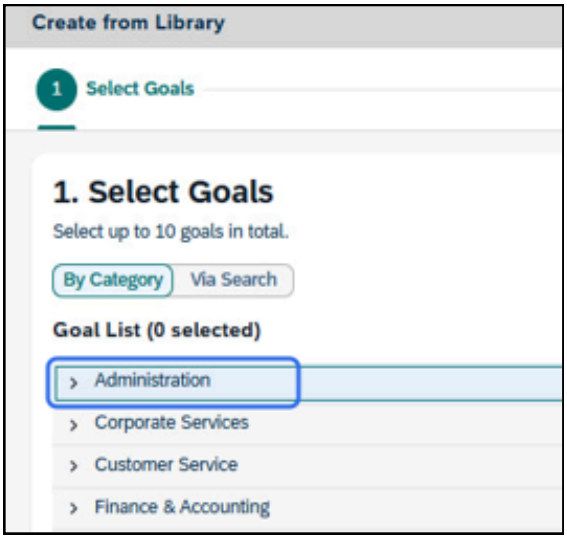
2 SELECT CREATE FROM LIBRARY

- Select **Create from Library**.
- This option is also available if you are creating goals in the CPM Planning Form.



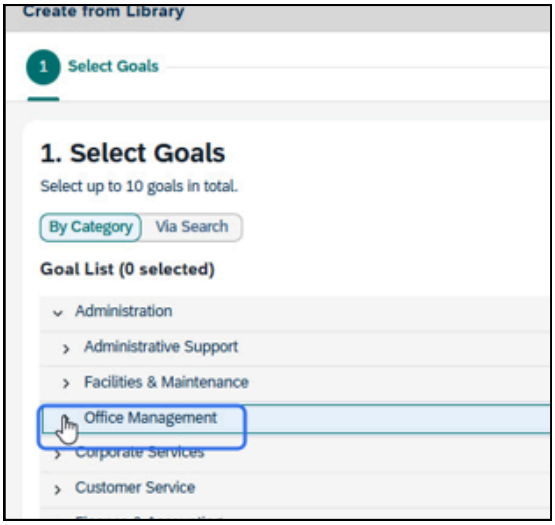
3 SELECT CATEGORY

- Option 1: You can browse goals **By Category**.
- Select the > next to the appropriate category.
- Option 2: Search for goals **Via Search**.



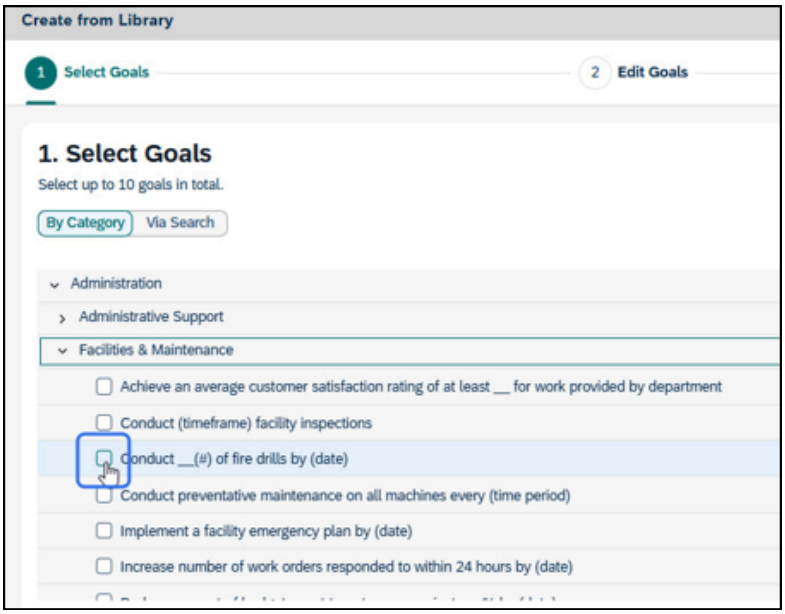
4 SELECT SUB-CATEGORY

Select the appropriate sub-category.



5 ADD SELECTED GOAL

- Select the **box** next to the goal you would like to add.
- Then, select **Next**.
- NOTE: You may add up to 10 goals at once from the library.



6 EDIT GOAL DETAILS

Most library goals have blanks or details in the Goal Name that need to be edited, so revise as necessary.

Edit **Goal Name.**

Edit **Metric.**

*Metric is required. This explains how the goal will be measured.

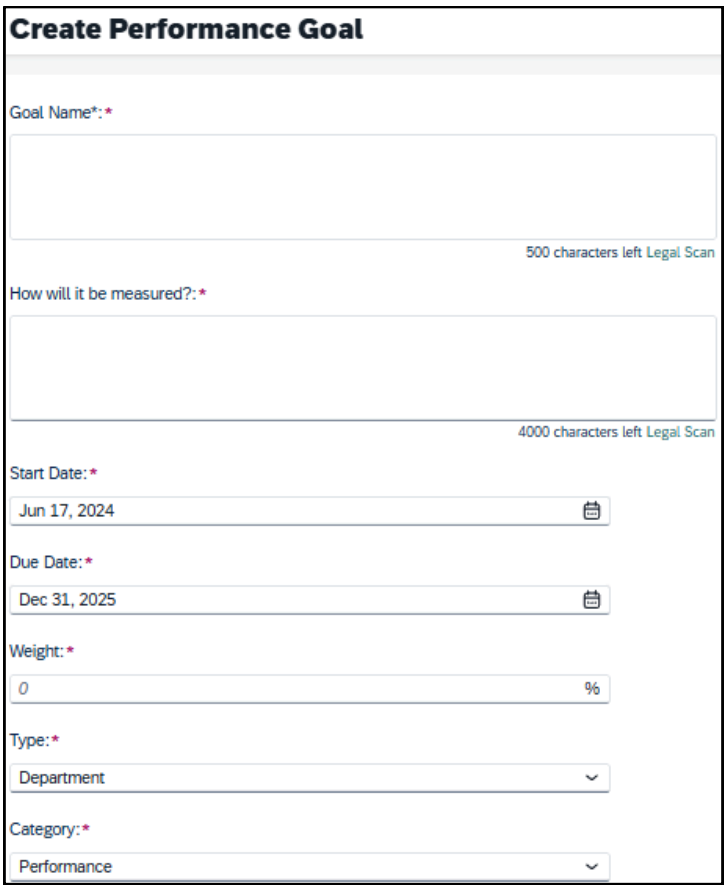
Change **Start Date/Due Date.**

Add **Weight** of Goal.

*The total weight must equal 100%.

Select **Type**.

Select **Category**.



Additional details about each option can be found in the **CPM Guide for Supervisors** available on the SCS CPM Training Center webpage.

7 SAVE GOALS

- After you have completed all of the fields, select **Next** at the bottom right of the screen. Select **Next** again.
- Select **Save**.

