



ERP-2320 Report Request (Req 75 & 76 & 114) : Goal Setting Tracking

Approved

Please see the [SyWay Analytics Approach](#) document, section 'Documentation' for more information about the context of this document.

Status	Approved
Functional Specification Owner	PRAZERES-ext, ines
Stakeholders	Aurélien Vermeillet, Helena Macieira
Jira Request ID	 ERP-1278 - Jira project doesn't exist or you don't have permission to view it.
Jira Development (Build) ID	 ERP-2320 - Jira project doesn't exist or you don't have permission to view it.
Lean IX App Link	
Business Process Reference (L4)	11.11.01.02. Create & Distribute Custom Reports

High-Level Specification

Parameter	Value
Application System (Delivery Tool)	SuccessFactors – Story Report Module: Goal Management / Performance Management/CDP

Functional Overview

Report label:

Continuous Performance Engagement

Type of report:

Story report

Purpose / Business Need

Why the report is needed

Syensqo wants to understand how **goalsetting practices influence performance outcomes** and identify employees **without goals** for compliance and development purposes. The report ensures goals are clearly set, aligned with business priorities, and consistently applied across the organization.

Business questions answered

- How many performance and development goals are set and completed?
- What is the goalsetting status across the organization?
- How does goalsetting correlate with endyear performance ratings?
- Which employees do not have goals defined?

Business value

The report supports HR and Managers in monitoring goalsetting practices, ensuring compliance, and identifying improvement opportunities related to performance and development.

Scope

In scope

- Employee performance vs goal setting
- Distribution of employees by:
 - Number of goals set
 - Number of goals completed
- Correlation with endyear performance rating
- Goalsetting status
- Number and percentage of employees without goals

Out of scope

- Nonactive employees
- Noncadre employees (restricted via pay grade)

Intended Users & Access

- System Administrators
- HR IT
- HR and Line Managers

Solution Overview

Content ownership: [PRAZERES-ext, ines](#)

Input from: Aurélien Vermeillet

Scope

The dashboards should include:

- Employee Performance vs Goal Setting
 - Track employee distribution based on the number of set goals vs completed goals
 - Correlation with performance outcome (end-year performance rating)
- Goal Setting Status
 - Track goal setting status
 - Number of completed goals
 - Percentage of employees without goals

Deliverables

Multiple dashboards within one story, including:

- Summary charts for goal-setting completion and performance correlation
- Detailed tables showing goal status and performance ratings

Data Source Filters

Active employees only - including white collar employees

Non-cadre should not be included. (we can restrict the population using the pay grade)

Dashboards / Charts

1. Summary KPIs: Headcount, FTE, Nr of Performance Goals Set, Average nr of performance goals set per user, Nr of Development Goals Set, Average nr of development goals set per user, Average performance rating

- Type of chart (bar, line, pie, etc.): Numerical
- Fields to be used: Headcount, FTE, Nr of Performance Goals Set, Nr of Development Goals Set, Average performance rating
- Any calculations required (provide details): Headcount, FTE, Nr of Performance Goals Set, Nr of Development Goals Set, Average performance rating

2. Nr of Performance Goals vs goal status

- Type of chart (bar, line, pie, etc.): pie chart
- Fields to be used: Nr of Goals Set, goal status
- Any calculations required (provide details): Nr of Goals Set

3. Nr of Development Goals vs goal status

- Type of chart (bar, line, pie, etc.): pie chart
- Fields to be used: Nr of Goals Set, goal status
- Any calculations required (provide details): Nr of Goals Set

4. Nr of Performance Goals (and %) per status per Type of Goal

- Type of chart (bar, line, pie, etc.): Pie chart
- Fields to be used: Nr of Goals Set, Goal Type
- Any calculations required (provide details): Nr of Goals

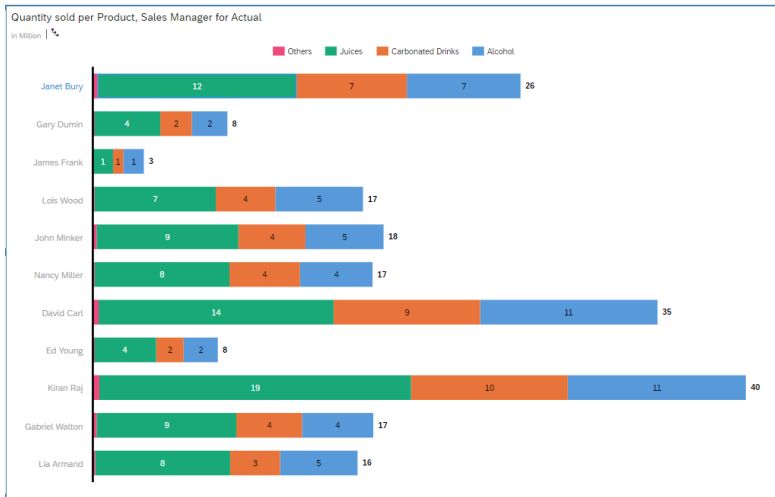
5. Nr of Performance Goals per status per several dimensions

- Type of chart (bar, line, pie, etc.): bar chart. Add input control with several dimensions, allows users to select how they want to see the data, e.g., Nr of Goals per Division or Nr of Goals per Entity, etc..
- Fields to be used: Nr of Goals Set, location, gender, Talent flags, Entity LT N-1, grades, regions, job function, country, site, department, goal status
- Any calculations required (provide details): Nr of Goals

6. Nr of Development Goals per status per several dimensions

- Type of chart (bar, line, pie, etc.): bar chart. Add input control with several dimensions, allows users to select how they want to see the data, e.g., Nr of Goals per Division or Nr of Goals per Entity, etc..
- Fields to be used: Nr of Goals Set, location, gender, Talent flags, Entity LT N-1, grades, regions, job function, country, site, department, goal status
- Any calculations required (provide details): Nr of Goals

Example of how the chart could look like: but in our case would be f.ex Nr of goals set per Division with a breakdown of the status of the goals identified by colors and nr.



7. Average Rating vs. Several dimensions

- Type of chart (bar, line, pie, etc.): bar chart. Add input control with several dimensions, allows users to select how they want to see the data, e.g., Nr of Goals per Division or Nr of Goals per Entity, etc..
- Fields to be used: Average Rating, location, gender, Talent flags, grades, regions, job function, country, site, department, goal status
- Any calculations required (provide details): Average Rating

8. Number and % of employees without development actions

- Type of chart (bar, line, pie, etc.): pie chart
- Fields to be used: Total number of employees, Status (Users with and Users without development goals)
- Any calculations required (provide details): Total number of employees, Status (Users with and Users without development goals)

Tables / Lists

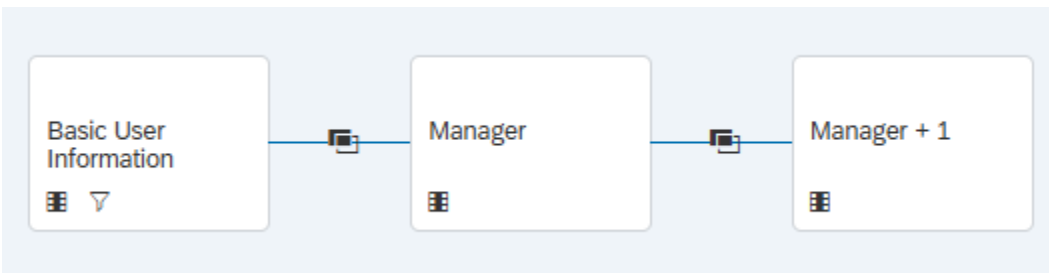
Employee User ID, Employee First and last name, Country, Legal entity, Division, Department, Team, Talent flag, gender, Nr of Development goals, Nr of Performance goals, Rating, performance goals set (goal name), development goals set (goal name), Performance goal details, Development goal details, goal status, goal plan year, goal creation date

Page Filters

- location, gender, Talent flags, **Entity LT N-1** (Allow to select the indirect reports HR want to be able to see the direct reports and indirect reports of Managers), grades, regions, job function, country, site, department, goal status

Details on the way we can filter to have data on the direct and indirect Reports:

1. On the data source we need to have the Manager and Manager +1 selected. Manager+1 is the Manager of the Manager.



2. Then there are 2 options to have as filter:


a) Add Manager and Manager of the Manager as filters:

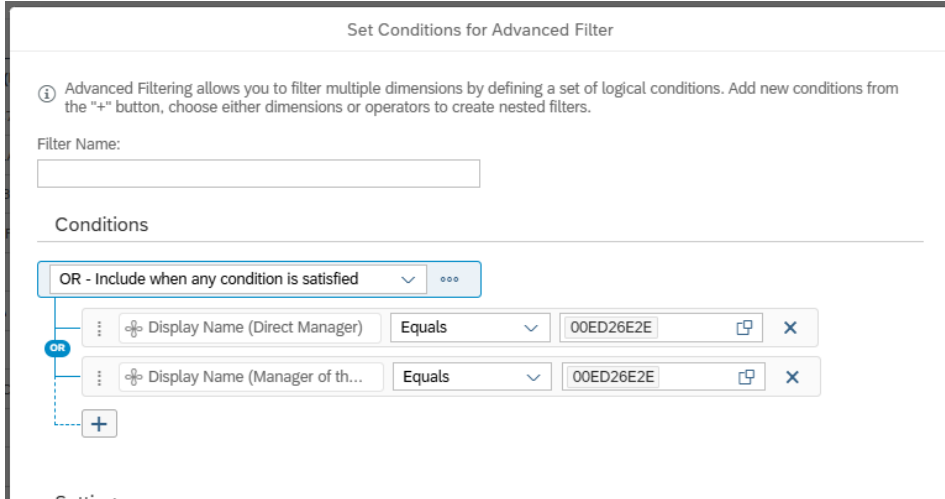
If we have these filters, they will act as an AND relationship, meaning we cannot apply both at the same time, otherwise we will get no data.

What we must do is to either apply the Manager filter (and see the direct reports of these manager), or apply the Manager of the Manager (and see the Indirect Reports of the Manager).

what we will not be able to see, is see simultaneously the direct and indirect reports of a Manager.

b) Add an Advanced filter with and OR condition as follows:

 Display Name (Direct Manager) + Display Name (Manager of the Direct Manager) (2)
Display Name (Direct Manager) + Display Name (Manager of the Direct Manager)



This will allow us to see the direct and indirect reports of a Manager simultaneously.

However, there is no possibility of selecting all users (i.e, not selecting any particular manager), which means that if we apply this filter the HRs will have to know to come to this filter and select a Manager otherwise they will not see any data displaying.

Layout & Distribution

Report Layout

1. Report should be in this format:
 - a. Page filters pinned at the top of the page
 - b. Syensqo Logo top left corner
 - c. Summary KPIs
 - d. Charts
 - e. Table

Report Sharing & Access

- 50-IT HR Specialist (HRIT)/System Admin/IT Admin
- 20-Line Manager(CS - Manager)
- 30-Talent Manager/Talent Management Business Partner

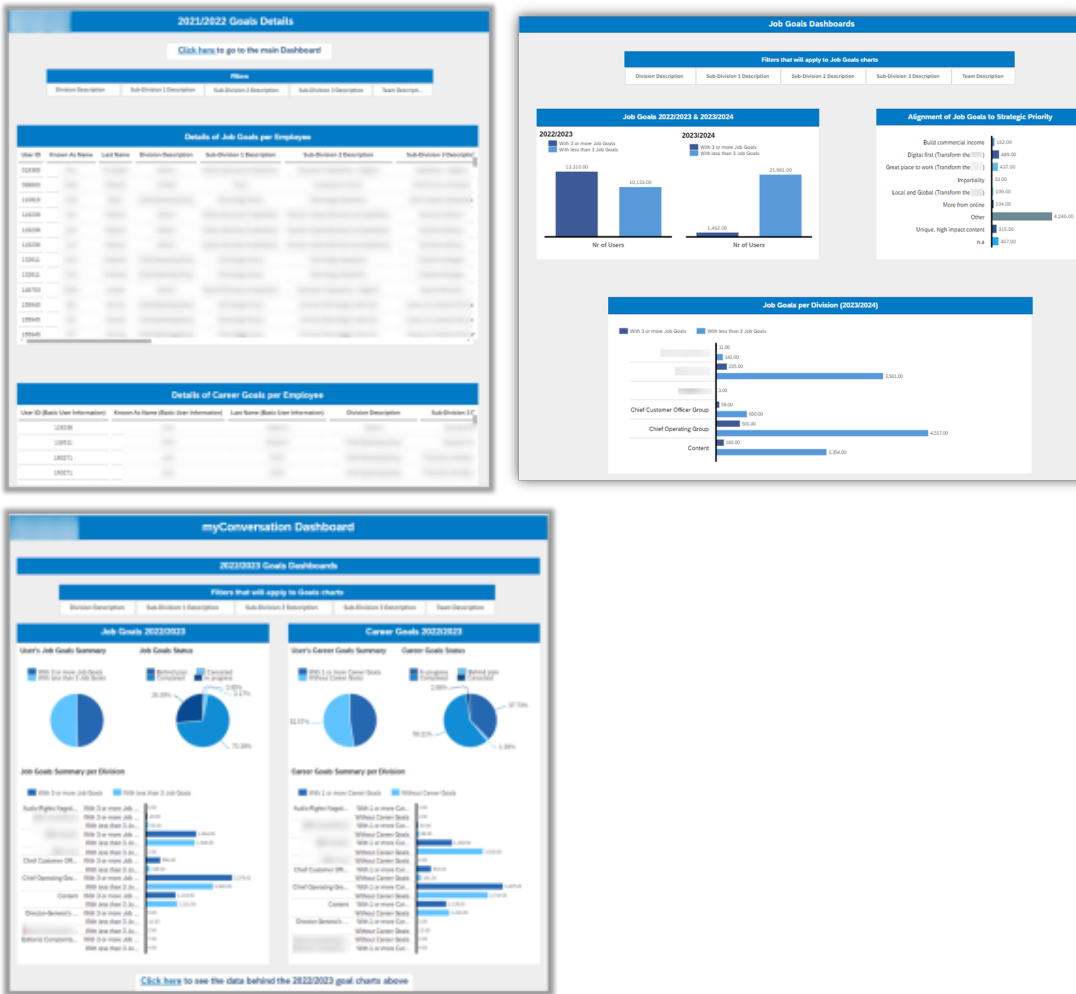
Additional Notes / Attachments

In order to allow HRs to see all data and also to see the Direct Reports and Indirect Reports of Managers, we propose the following:

- Have 1 tab for HRs to see all employees, and here we can add the filter Manager and Manager of the Manager:
 - Here HRs will be able to see all data (all employees), but also see direct and indirect reports of managers separately. AND, managers can also use the Manager and Manager of the Manager to see their own Direct reports and Indirect reports
- Have a another tab for HRs to see data of the direct and indirect reports of a Manager simultaneously
 - To note that when the HR first opens the tab they will not see any data, and will only see data after they apply the filter. We can have this filter as a page filter and a note that highlights that the filter needs to be applied.

Screenshots

Example of reports:



Story Page 1 – Goal Setting Tracking

Page Objective

Provide a consolidated view of **goalsetting practices and their correlation with performance outcomes**, using summary KPIs, charts, and detailed employeelevel data.

Page Filters

Report Field Name	Mandatory / Optional	Prompt Type	Default / Restrictions
Location	Optional	Multiple Single Values	All
Gender	Optional	Multiple Single Values	All
Talent Flag	Optional	Multiple Single Values	All
Entity LT N1	Optional	Hierarchy	All
Grade	Optional	Multiple Single Values	All
Region	Optional	Multiple Single Values	All
Job Function	Optional	Multiple Single Values	All

Country	Optional	Multiple Single Values	All
Site	Optional	Multiple Single Values	All
Department	Optional	Multiple Single Values	All
Goal Status	Optional	Selection Option	All

Page Level Input Controls

- Dimension selector allowing users to analyze charts by:
 - Location
 - Gender
 - Talent Flag
 - Entity LT N1
 - Grade
 - Region
 - Job Function
 - Country
 - Site
 - Department

Calculations

All calculations are performed within SuccessFactors reporting capabilities:

- Headcount
- FTE
- Number of Performance Goals
- Number of Development Goals
- Average number of goals per user
- Average performance rating

Layout

Page layout order:

1. Page filters pinned at the top
2. Syensqo logo (topleft)
3. Summary KPIs
4. Charts
5. Detailed tables

Dashboards / Charts

Summary KPIs (Numerical):

- Headcount
- FTE
- Number of Performance Goals Set
- Average Number of Performance Goals per User
- Number of Development Goals Set
- Average Number of Development Goals per User
- Average Performance Rating

Charts:

- Number of Performance Goals vs Goal Status (Pie)
- Number of Development Goals vs Goal Status (Pie)
- Performance Goals per Status and Goal Type (Pie)
- Performance Goals per Status across Multiple Dimensions (Bar with input control)
- Development Goals per Status across Multiple Dimensions (Bar with input control)
- Average Rating across Multiple Dimensions (Bar with input control)
- Number and Percentage of Employees without Development Goals (Pie)

Tables / Lists

Employeelevel table includes:

- Employee User ID
- Employee First and Last Name
- Country
- Legal Entity
- Division
- Department
- Team

- Talent Flag
- Gender
- Number of Development Goals
- Number of Performance Goals
- Performance Rating
- Performance Goal Name
- Development Goal Name
- Performance Goal Details
- Development Goal Details
- Goal Status
- Goal Plan Year
- Goal Creation Date

Story Filters (Global)

Report Field Name	Mandatory / Optional	Prompt Type	Default / Restrictions
Employee Status	Mandatory	Selection Option	Active employees only
Employee Type	Mandatory	Selection Option	Whitecollar only

Business Roles

- HR
- Line Managers
- HR IT / System Administrators

Design Rationale

No existing report in the current catalog meets the business requirements. SAP standard templates were reviewed but are insufficient due to the complexity of required analyses and correlations. A custom SuccessFactors Story Report is therefore required.

Assumptions

- Data is sourced exclusively from SuccessFactors modules (Goal Management, Performance Management, CDP).
- Only active, whitecollar employees are included.
- Managerial hierarchy data is correctly maintained.

Dependencies

- Availability and consistency of goal and performance data in SuccessFactors.
- Correct population of manager and organizational attributes.

Special Requirements

- Ability to analyze data across multiple organizational dimensions using input controls.
- Clear identification of employees without goals for compliance monitoring.

Frequency of Analysis / Report Run

Daily and Quarterly (ad hoc usage).

Testing Considerations / Dependencies

- Validate layout, filters, and input controls.
- Validate correlation between goals and performance ratings.
- Validate exclusion rules (inactive and noncadre employees).

Test Conditions and Expected Results

ID	Condition	Expected Result
TC01	Open report without filters	Data displayed for all active whitecollar employees
TC02	Apply goal status filter	Charts and tables update accordingly

TC03	Change dimension via input control	Charts reaggregate correctly
TC04	Review employees without goals	Correct count and percentage displayed

See also

Change log

Version	Published	Changed By	Comment
CURRENT (v. 1)	Mar 02, 2026 12:03	SKIKDAOUI-ext, Myriam	

Workflow history

This view shows the 5 most recent entries. The complete workflow log is available from the 'Document Activity' menu item.

Mar 09, 2026	Actor	Type	Activity	Version
Approved	 GARNIER-ext, Marion	State	changed state to Approved at 8:19 pm	v1
Lead Approval	 GARNIER-ext, Marion	State	gave <i>POD Lead Review</i> approval at 8:19 pm	
Mar 06, 2026				
	 SKIKDAOUI-ext, Myriam	State	assigned approval <i>POD Lead Review</i> to  GARNIER-ext, Marion at 12:22 pm	
Mar 04, 2026				
	 PRAZERES-ext, ines	State	changed expiry date to '11 Mar, 2026 03:03 pm' at 3:03 pm	
		State	changed state to Lead Approval at 3:03 pm	v1
Tech Review	 PRAZERES-ext, ines	State	gave <i>Tech Review</i> approval at 3:03 pm	