salesforce

Work.com Implementation Guide

Salesforce, Winter '17

CONTENTS

WORK.COM IMPLEMENTATION OVERVIEW

Work.com is a suite of sales-management and service-management tools that help managers and teams learn faster and perform better.

Work.com has various features to help your sales and service teams. This includes recognition tied to real rewards, detailed goals and real-time coaching, and full-featured performance reviews.

After you receive your Work.com licenses, you'll need to set up Work.com by performing the following activities.

- Assign a Work.com administrator to complete the setup process.
- Enable preferences for Work.com features.
- Set up permissions to Work.com features with profiles or permission sets.
- Assign Work.com licenses to users.
- Configure Work.com features for your organization.

SEE ALSO:

Work.com Feature Overview

PREREQUISITES

USER PERMISSIONS

To enable Work.com features:	"Customize Application"
To assign permission sets:	"Assign Permission Sets"
To assign profiles:	"Manage Users"
To set field-level security:	"Manage Profiles and Permission Sets" AND "Customize Application"
To view the Calibration tab:	"Enable Work.com Calibration"

EDITIONS

Available in: Salesforce Classic

Work.com is available as an add-on license for **Professional Edition**, **Enterprise Edition**, **Unlimited Edition**, or **Developer Edition**, and is included in **Performance Edition**.

Plan out your implementation before enabling Work.com in your organization.

Administrators should make the decisions outlined in the Business Decision Checklist before enabling Work.com.

Before beginning the implementation process, Salesforce must enable Work.com permissions and provision Work.com licenses for your organization. Your Salesforce contact will coordinate this with you, but you can check if your organization has available Work.com licenses. In Setup, enter `Company Information` in the `Quick Find` box, then select **Company Information**, and check for Work.com User under **Feature Licenses**.

> **Note:** We recommend that you enable Chatter regardless of the edition your org is using. Many Work.com features use the Chatter feed to notify and interact with users. To confirm that Chatter is enabled, from Setup, enter `Chatter Settings` in the `Quick Find` box, then select **Chatter Settings**, and verify that Chatter Settings is enabled.

ENABLE WORK.COM

Assign a Work.com Administrator

Before enabling Work.com in your organization, you must assign a Work.com user feature license to the person who will be the system administrator and responsible for setting up Work.com for your organization.

If you're the administrator setting up Work.com, assign the license to yourself.

1. From Setup, enter *Users* in the `Quick Find` box, then select **Users**.
2. Find the name of the person who will be the system administrator and click **Edit** next to their name.
3. In the right-hand column, select the **Work.com User** checkbox.
4. Click **Save**.

We strongly recommend that you create a separate Work.com Administrator profile with limited access because the standard Salesforce System Administrator profile is so powerful. For more information, see the Create Your Work.com Administrator Profile.

Enable Work.com Features

Administrators can enable preferences for Work.com features on the Work.com Settings page.

All the settings except for Thanks Settings and Skills Settings require a Work.com license.

1. From Setup, enter *Work.com Settings* in the `Quick Find` box, then select **Work.com Settings**.
2. Select the Work.com features you want to enable:

    For users that purchased Work.com prior to the Spring '15 release, the features that appear differ depending on whether you have add-on licenses to **Work.com Motivate, Work.com Align**, or **Work.com Perform**.

Feature	Section	Description
Enable Thanks	**Thanks Settings**	Enable Thanks to allow users to recognize others with thanks badges on the Chatter feed.
		If you disable this setting, users no longer see the Thanks action in the Chatter publisher. However, they can still see previously created Thanks posts.
Restrict Custom Badge Creators	**Thanks Settings**	By default, all users can create custom badges. This setting restricts badge creation to users that

Feature	Section	Description
		have the "Create" permission on the Reward object.
Enable Rewards	**Recognition Settings**	Enable Rewards to tie tangible rewards to badges. Reward creators can upload gift codes to create Reward funds. See the "Reward Funds" topic for more information about creating rewards.
Enable Manager Groups for Coaching	**Coaching Settings**	Enable manager groups to give managers access to the coaching spaces of the users that report to them. To enable this setting, the Manager Groups setting must first be enabled in Setup, under **Sharing Settings**.
Enable Manager Groups for Goals	**Goal Settings**	Enable manager groups to give managers access to the goals of the users that report to them. To enable this setting, the Manager Groups setting must first be enabled in Setup, under **Sharing Settings**.
Enable Calibration	**Perform Settings**	Enable Calibration to see and update performance across teams and individuals. 📝 Note: For **Performance Edition** organizations, Calibration is not available for the following profiles: Contract Manager, Marketing User, Read Only, and Solution Manager.
Enable Skills	**Skills Settings**	Enable Skills to allow users to add skills to their profiles and endorse the skills of other users. Enabling this setting replaces the Knowledgeable About widget on Chatter profiles.
Restrict Skill and Endorsement Editing to Record Detail Pages	**Skills Settings**	Disables inline editing of skills and endorsements on Chatter profiles, and restricts editing to record detail pages. Recommended if you have customized these objects with custom required fields. 📝 Note: Don't enable this setting if you want to use skills in Chatter profiles.
Enable Automatic Skill Feed Posts	**Skills Settings**	Enable to automatically create Chatter feed posts when a user adds a new skill.
Enable Suggested Skills	**Skills Settings**	Enable Suggested Skills to have the skills widget suggest skills for users to add based on their Chatter Topics activity.

3. Click **Save**.

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Work.com Feature Access

Once Work.com is enabled for your organization, grant users access to Work.com features using either profiles or permission sets.

Administrators can grant users access to Work.com features with either profiles or permission sets.

> 📝 **Note:** Professional Edition organizations will need to grant access through existing profiles.

- A profile contains user permissions and access settings that control what users can do within their organization. Each user can only have one profile. Refer to Recommended Work.com Profiles for more information about creating profiles.
- A permission set is a collection of settings and permissions that gives users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Refer to Recommended Work.com Permission Sets for more information about creating the proper permission sets.

If your organization has provisioned Work.com Only user licenses, they come with a standard Work.com Only profile. Keep in mind that you can't modify the standard profile, but you can clone it and modify the cloned profile.

IN THIS SECTION:

Assign Work.com Permission Sets

Assign permission sets with Work.com access to your users from Setup.

Assign Work.com Profiles

Assign profiles with Work.com access to your users from Setup.

<aside>
EDITIONS

Available in: Salesforce Classic

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
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Assign Work.com Permission Sets

Assign permission sets with Work.com access to your users from Setup.

Before you can assign permission sets to your users, you must create permission sets with Work.com access. Refer to Recommended Work.com Permission Sets for more information.

1. From Setup, enter *Users* in the `Quick Find` box, then select **Users**.

2. Select a user.

3. In the Permission Set Assignments related list, click **Edit Assignments**.

4. To assign a permission set, select it from the Available Permission Sets box and click **Add**. To remove a permission set assignment, select it from the Enabled Permission Sets box and click **Remove**.

   You can also assign permission sets to many users at the same time. For more information, see "Assign a Permission Set to Multiple Users" in the Salesforce Help.

   > 📝 **Note:** The Permission Set Assignments page shows permission sets
   >
   > - With no associated license. For example, you can assign a permission set where --**None**-- was selected for license type in the permission set. Make sure that the user's license allows all the permission set's enabled settings and permissions. If the user's license doesn't allow the enabled settings and permissions, the assignment fails.
   > - That match the user's license. For example, if a user's license is Chatter Only, you can assign permission sets with the Chatter Only license.

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USER PERMISSIONS

To assign permission sets:
- "Assign Permission Sets"
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- Specific to permission set licenses. Let's say you create a permission set named "Identity: Finance" and associate that permission set to the "Identity Connect" permission set license. When you assign a user to the Identity: Finance permission set, the user receives all functionality available with the Identity Connect permission set license.

Some permissions require users to have permission set licenses before users are granted those permissions. For example, if you add the "Use Identity Connect" user permission to the "Identity" permission set, you can assign only users with the Identity Connect permission set license to the "Identity" permission set.

5. Click **Save**.

Assign Work.com Profiles

Assign profiles with Work.com access to your users from Setup.

Before you can assign profiles to your users, you must create profiles with Work.com access. Refer to Recommended Work.com Profiles for more information.

1. From Setup, enter *Users* in the Quick Find box, then select **Users**.

2. Click **Edit** next to a user.

3. From the **Profile** drop-down, select the profile you would like to assign.

4. Click **Save**.

Work.com License Types

After granting access to Work.com features with permission sets or profiles, assign users a Work.com license.

Work.com has two types of licenses.

- Work.com Only user licenses are for users who don't have a Salesforce license and will only use the Work.com features in your organization.

  📝 **Note:** Work.com Only user licenses have limited administrator functionality. Assign Work.com User Feature licenses instead for users who will be administering performance summary cycles or other Work.com features.

- Work.com User Feature licenses are for users who also have a Salesforce license.

You may want to configure Work.com features before assigning licenses to all users. For example, you may want to initially limit licenses to Work.com administrators to avoid exposing certain features prior to your launch date.

IN THIS SECTION:

Assign Work.com Only User Licenses

Assign a Work.com Only license to users who don't have a Salesforce license and will only use Work.com.

Assign a Work.com User Feature license to users who also have a Salesforce license.

Assign Work.com Only User Licenses

Assign a Work.com Only license to users who don't have a Salesforce license and will only use Work.com.

Work.com Only user licenses have limited administrator functionality. Assign Work.com User Feature licenses instead for users who will be administering performance summary cycles or other Work.com features.

1. From Setup, enter *Users* in the `Quick Find` box, then select **Users**.

2. Click **Edit** next to a user.

3. From the **User License** drop-down, select **Work.com Only**.

4. Click **Save**.

EDITIONS

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USER PERMISSIONS

To assign user licenses:
- "Manage Users"

Assign Work.com User Feature Licenses

Assign a Work.com User Feature license to users who also have a Salesforce license.

1. From Setup, enter *Users* in the `Quick Find` box, then select **Users**.

2. Click **Edit** next to a user.

3. In the right-hand column, select the **Work.com User** checkbox.

4. Click **Save**.

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USER PERMISSIONS

To assign user feature licenses:
- "Manage Users"

CONFIGURE WORK.COM FEATURES

Work.com Feature Overview

Most Work.com features require the Work.com add-on, but some are freely available to Sales Cloud users.

Users can access the Skills and Thanks features (excluding Rewards) without Work.com. Other features require the Work.com add-on.

Table 1: Work.com Features Available

Feature	Requires Work.com Add-On
Recognition: Create and give thanks badges	
Recognition: Create and give rewards badges	✅
Skills: Share and endorse skills	
Goals: Define and track your work	✅
Coaching: Give real-time coaching	✅
Feedback: Give and offer feedback	✅
Performance: Track performance data	✅
Calibration: Visualize and change performance data	✅

📝 **Note:** We recommend that you enable Chatter regardless of the edition your org is using. Many Work.com features use the Chatter feed to notify and interact with users. To confirm that Chatter is enabled, from Setup, enter `Chatter Settings` in the `Quick Find` box, then select **Chatter Settings**, and verify that Chatter Settings is enabled.

You can customize where different tabs, such as Goals and Feedback, appear within the Work.com app and on user profiles. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps** and make changes to the desired apps and subtab apps. For more information, see Managing Subtab Apps in the Salesforce Help.

Thanks and Skills Features

Set up Thanks and Skills features by configuring thanks in the Chatter publisher and assigning a publisher layout to profiles.

Make sure you've enabled the desired Thanks and Recognition features prior to configuring them. From Setup, enter "Work.com Settings" in the `Quick Find` box, then select **Work.com Settings** and enable the relevant settings.

For detailed information about creating rewards, refer to Reward Funds in the Salesforce Help. Additionally, information about customizing skills can be found in the Skills Customization topic.

IN THIS SECTION:

Configure Thanks in the Chatter Publisher and Salesforce1 Action Bar

You can change the position of the Thanks action in the Chatter publisher and the Salesforce1 action bar, or even hide Thanks for specific profiles.

Assign Publisher Layout to Profiles

Assign the publisher layout with Thanks to user profiles. People with these profiles can thank their coworkers directly from the publisher.

EDITIONS
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Configure Thanks in the Chatter Publisher and Salesforce1 Action Bar

You can change the position of the Thanks action in the Chatter publisher and the Salesforce1 action bar, or even hide Thanks for specific profiles.

To modify the Chatter publisher, actions in the publisher must be enabled.

1. From Setup, enter `Chatter Settings` in the `Quick Find` box, then select **Chatter Settings**.

2. Confirm that `Enable Actions in the Publisher` is selected in the Actions in the Publisher section. If it isn't enabled, click **Edit**, select `Enable Actions in the Publisher`, and click **Save**.

3. From Setup, enter `Publisher Layouts` in the `Quick Find` box, then select **Publisher Layouts**.

4. Click **Edit** next to the Global Publisher Layout.

5. Drag the **Thanks** action to where you want it to appear in the Chatter publisher or the Salesforce1 action bar.

6. Click **Save**.

You can hide Thanks for specific users by changing profile visibility settings.

EDITIONS
Available in: Salesforce Classic
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USER PERMISSIONS
To set up actions:
• "Customize Application"

Assign Publisher Layout to Profiles

Assign the publisher layout with Thanks to user profiles. People with these profiles can thank their coworkers directly from the publisher.

If not everyone in your organization should have this feature, create another layout without Thanks and assign it to a profile. People with that profile won't see Thanks in their publisher.

1. From Setup, enter `Publisher Layouts` in the `Quick Find` box, then select **Publisher Layouts**.
2. Click **Publisher Layout Assignment**.
3. Click **Edit Assignment**.
4. Select a user profile by clicking anywhere on its row in the table.
5. From the Publisher Layout to Use drop-down, select the global publisher layout that you want to assign to the highlighted profile.
6. Save the layout.

Goals and Coaching Features

Enable feed and history tracking to further track goals and coaching.

📝 **Note:** Enable Chatter in your organization before configuring Goals and Coaching features.

Feed tracking lets users see Chatter feed updates for any relevant changes. History tracking lets you track changes to critical fields. We recommend that you track changes for Goal, Metric, and Coaching objects.

Surface key company goals to give all employees visibility into company-wide goals.

For additional information about creating an overall Goals strategy for your organization, see the Goals Strategy Guide.

IN THIS SECTION:

Enable Feed Tracking for Goals
Track updates for goals so users can receive notifications about important changes.

Enable Feed Tracking for Coaching
Track updates for coaching spaces, so users can receive notifications about important changes.

Enable Feed Tracking for Metrics
Track updates for goals so users can receive notifications about important changes.

Enable History Tracking for Goal Fields
Track changes to the Goal object for auditing purposes.

Enable History Tracking for Coaching Fields
Track changes to the Coaching object for auditing purposes.

Enable History Tracking for Metric Fields
Track changes to the Metric object for auditing purposes.

Configure Key Company Goals

Key company goals give everyone in your organization visibility into a company-wide goal after you grant sharing access from the goal's detail page. Work.com administrators and people who have been granted access have the ability to create key company goals.

Enable Feed Tracking for Goals

Track updates for goals so users can receive notifications about important changes.

Determine which goal updates should notify people and select the associated fields for tracking.

1. From Setup, enter *Feed Tracking* in the `Quick Find` box, then select **Feed Tracking**.

2. Click on the Goal object.

3. Click the **Enable Feed Tracking** checkbox.

4. Select the fields you would like to track.

   💡 Tip: For goals, it's helpful to track Completion Date, Due Date, Owner Name, Progress, and All Related Objects.

5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize fields tracked in feeds:
- "Customize Application"

Enable Feed Tracking for Coaching

Track updates for coaching spaces, so users can receive notifications about important changes.

Determine which coaching updates should notify people and select the associated fields for tracking.

1. From Setup, enter *Feed Tracking* in the `Quick Find` box, then select **Feed Tracking**.

2. Click on the Coaching object.

3. Click the **Enable Feed Tracking** checkbox.

4. Select the fields you would like to track.

   💡 Tip: For coaching, it's helpful to track Inactive and All Related Objects.

5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize fields tracked in feeds:
- "Customize Application"

Enable Feed Tracking for Metrics

Track updates for goals so users can receive notifications about important changes.

Determine which metric updates should notify people and select the associated fields for tracking.

1. From Setup, enter `Feed Tracking` in the `Quick Find` box, then select **Feed Tracking**.

2. Click on the Metric object.

3. Click the **Enable Feed Tracking** checkbox.

4. Select the fields you would like to track.

   💡 Tip: For metrics, it's helpful to track Comment, Completion Date, Current Value, Due Date, Goal, Initial Value, Owner Name, Status, Target Value, and All Related Objects.

5. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize fields tracked in feeds:
- "Customize Application"

Enable History Tracking for Goal Fields

Track changes to the Goal object for auditing purposes.

We recommend tracking the Completion Date, Due Date, Owner Name, Progress, Start Date, Status, and Description fields.

1. From the object management settings for goals, go to the fields area.

2. Click **Set History Tracking**.

3. Select up to 20 fields to track.

4. Click **Save**.

SEE ALSO:

    Salesforce Help: Find Object Management Settings

EDITIONS

Available in: Salesforce Classic

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To set up which fields are tracked:
- "Customize Application"

Enable History Tracking for Coaching Fields

Track changes to the Coaching object for auditing purposes.

We recommend tracking the Coach, Inactive, Owner Name, and Person Coached fields.

1. From the object management settings for goals, go to the fields area.

2. Click **Set History Tracking**.

3. Select up to 20 fields to track.

4. Click **Save**.

SEE ALSO:

Salesforce Help: Find Object Management Settings

Enable History Tracking for Metric Fields

Track changes to the Metric object for auditing purposes.

We recommend tracking the Comment, Completion Date, Current Value, Due Date, Goal, Initial Value, Owner Name, Status, Target Value, Weight, and Description fields.

1. From the object management settings for metrics, go to the fields area.

2. Click **Set History Tracking**.

3. Select up to 20 fields to track.

4. Click **Save**.

SEE ALSO:

Salesforce Help: Find Object Management Settings

Configure Key Company Goals

Key company goals give everyone in your organization visibility into a company-wide goal after you grant sharing access from the goal's detail page. Work.com administrators and people who have been granted access have the ability to create key company goals.

Alternatively, you can also set field-level security using permission sets.

1. From the object management settings for goals, go to the fields area.

2. Click on the **Key Company Goal** field label.

3. Click **Set Field-Level Security**.

4. Ensure the **Visible** checkbox is selected for all profiles with goals access.

5. Ensure the **Read-Only** checkbox is not selected for profiles that should be able to create key company goals.

6. Click **Save**.

SEE ALSO:

Salesforce Help: Find Object Management Settings

Performance Summary and Calibration Features

Set up Calibration reports to compare and update performance ratings in your organization.

Work.com performance summaries gather feedback about people in your organization with a custom questionnaire. You can create, deploy, and share different performance summaries across your organizations by managing performance summary cycles. Once users have submitted performance summary details, you can see and update performance ratings across the organization with the Calibration feature.

You can create and deploy performance summary cycles from the **Performance Cycles** tab. Users with the Performance Cycle Manager permission set or profile will be able to access the **Performance Cycles** tab.

For detailed information about creating and deploying performance summary cycles, refer to Performance Summary Cycles Overview in the Salesforce Help. For more information about the Calibration feature, refer to the Calibration Overview topic.

IN THIS SECTION:

Set Up Calibration Reports

Calibration reports are populated with data from performance summary cycles. They are designed for managers and executives to review overall performance of their teams or organizations. Before using the Calibration feature, you must create a report that loads the performance summary data.

Set Up Calibration Reports

Calibration reports are populated with data from performance summary cycles. They are designed for managers and executives to review overall performance of their teams or organizations. Before using the Calibration feature, you must create a report that loads the performance summary data.

Define your own calibration report or download the calibration reports package from the Package Installation page.

- Production Calibration Report Package
- Sandbox Calibration Report Package

1. On the Calibration tab, select a calibration report from the drop-down list.

2. Click **View/Edit Report**.

3. Click **Save As**.

4. Type a name, an optional description, unique name, and specify the report folder.

   If the report is saved to a public folder, anyone with permission to view the folder sees this report, but each user will only see performance summaries they have access to. If the report is saved to "My Personal Custom Reports," only you will see the Calibration report.

5. Click **Save & Return to Report**.

   💡 Tip: You can also create a new report. Once a report meets specific criteria, it automatically appears in the Calibration drop down.

   - The report must be a **Work.com Calibration** report type.
   - The report must be in a **Summary Format**, grouped by Feedback Question Name and then by Feedback.
   - These columns should be listed in the report:
     - Performance Cycle ID
     - Feedback Request ID
     - Feedback ID
     - Subject: User ID
     - Subject: Full Name (or Subject: First Name and Subject: Last Name)
   - The report must be filtered to only view one performance summary cycle.

Once you've downloaded the package or created a report that meets the criteria, it automatically appears in the Calibration drop-down.

CONFIGURE WORK.COM REPORTS AND DASHBOARDS

Work.com Report and Dashboard Overview

Use reports and dashboards to see how Work.com features are being used in your organization.

Salesforce reports and dashboards are available for all Work.com users. Administrators should install the reporting package that applies to their Work.com edition. The Work.com reporting package contains:

- Custom report types for Work.com objects
- Custom fields for Work.com objects
- Example dashboards

Install one of the following packages based on the Work.com edition you purchased. For example, if your organization has Work.com Align, only install the Align package. Refer to your product contract to confirm which Work.com edition you have.

> **Note:**
> - Make sure you've enabled the features related to your Work.com edition prior to installing the package. The package will only install correctly if you've enabled the features beforehand.
> - If you purchased Work.com after the Spring '15 release, install the Work.com Perform package.
> - It is not possible or necessary to install all the packages.

Production Packages:
- Work.com Motivate
- Work.com Align
- Work.com Perform
- Thanks and Skills Reports and Dashboards

Sandbox Packages:
- Work.com Motivate
- Work.com Align
- Work.com Perform
- Thanks and Skills Reports and Dashboards

Work.com Report and Dashboard Details

The Work.com reports and dashboards included in the reporting package are a good starting point. Use these examples to create reports and dashboards that are useful to your organization.

Work.com Perform Package Reports

These reports are available after installing the Work.com Perform package. Work.com reports are organized in folders based on features:

- Work.com Coaching Reports
- Work.com Goal Reports
- Work.com Performance Summary Reports
- Work.com Recognition Reports
- Work.com Skills Reports

Table 2: Work.com Coaching Reports

Report Name	Description
Coaching Activities (Tasks and Events)	Tasks and events related to coaching spaces
Coaching Activities Team - Last 30 Days	Coaching activities of your team over the last 30 days
Coaching Activity Last 30 Days	Coaching activities over the last 30 days sorted by department
Coaching Coverage Report	The percentage of users that have coaching spaces by department
Coaching Events by Relationship	Events related to coaching spaces
Coaching Relationships	All coaching spaces in your organization

Table 3: Work.com Goal Reports

Report Name	Description
All Goals	All goals in your organization
All Metrics	All metrics in your organization
Goals Created by Date	Goals sorted by the date they were created
Key Company Goal Progress	Key company goals, their status, and other details
Metrics Flagged as Behind or Critical	Metrics with a Status of Behind or Critical
Stale Goals	Goals that haven't been modified in 30 days
Work.com Team Goals Progress	Your team's goals and their progress

Table 4: Work.com Performance Summary Reports

Report Name	Description
All Active Users with a Manager	All active users with a manager in your org
Manager Questions - X	The manager questions asked in a performance summary
Performance Answers by Question - Q1	Sample report for tracking performance cycle activity
Performance Answers by Question - Q3	Sample report for tracking performance cycle activity
Performance Summaries by Department	Performance summaries grouped by department
Performance Summaries with Answers - Q1	Sample report for tracking performance cycle activity
Performance Summaries with Answers - Q3	Sample report for tracking performance cycle activity
Performance Summary Cycle Status Update	The request status across different performance summaries
Self Summary Questions - X	The questions asked in self summaries
Summary Cycle Details	The percentage of participants per performance cycle
Summary Cycle Details - Submitted	The percentage of submitted requests per performance cycle

Table 5: Work.com Recognition Reports

Report Name	Description
Badges Given - By Date Given	Thanks badges given grouped by the date each badge was given
Breakdown of Badges Given	Thanks badges given grouped by individual badges and the role of the badge giver
Breakdown of Badges Received	Thanks badges received grouped by individual badges and the role of the badge recipient
Reward Funds Given	The amount of each reward fund that has been distributed
Reward Funds Remaining	The amount of each reward fund that is still remaining
Thanks by Giver	Thanks badges given by each user
Thanks Given - Recipient Data	Thanks badges received by each user
Thanks Received by Role	Thanks badges received by each role

Table 6: Work.com Skills Reports

Report Name	Description
Most Endorsed People	Users with the most skill endorsements
Most Skilled People	Users with the most associated skill records
New Skill Creation By Date	Skills arranged by the date they were created
Skill Endorsements By Date	Endorsements arranged by the date they were created

Report Name	Description
Skills Added To Profiles By Date	Skills arranged by the date they were associated with different user profiles
Top Skills	Skills arranged by the number of people with the skill

Work.com Perform Package Dashboards

These dashboards are available after installing the Work.com Perform package:

- Work.com Coaching Dashboards
- Work.com Performance Summary Dashboards
- Work.com Recognition Dashboards
- Work.com Skills Dashboards

Table 7: Work.com Coaching Dashboards

Report Name	Description
Company Coaching Dashboard	Displays coaching coverage and activity across your company
Company Goals Dashboard	Displays Key Company Goals and the number of goals created
Manager Coaching Dashboard	Displays coaching and goals related to your team

Table 8: Work.com Performance Summary Dashboards

Report Name	Description
Performance Cycle Dashboard	Displays statistics about the participants, questions, and progress of a specific performance cycle

Table 9: Work.com Recognition Dashboards

Report Name	Description
Recognition Dashboard	Displays badge statistics and users giving and receiving badges
Recognition with Rewards Dashboard	Displays badge and rewards statistics and users giving and receiving badges

Table 10: Work.com Skills Dashboards

Report Name	Description
Skills Dashboard	Displays skills statistics for your organization

RECOMMENDED WORK.COM PERMISSION SETS

Create different permission sets for different types of Work.com users.

Create new permission sets for each type of Work.com user.

Use the tables below to assign the appropriate object settings and system permissions for each permission set.

Standard User

The Standard User permission set gives a user all the basic Work.com functionality.

Table 11: Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Available ✔ Visible ✔						
Coaching (object)		✔	✔	✔			
Coaching (tab)	Available ✔ Visible ✔						
Documents		✔	✔	✔			
Endorsements		✔	✔	✔	✔		
Feedback (object)		✔	✔	✔	✔		
Feedback Questions		✔	✔	✔			
Feedback Question Sets		✔	✔	✔			
Feedback Requests (and Feedback tab)	Available ✔ Visible ✔	✔	✔	✔			
Goal Links		✔	✔	✔	✔		
Goals (object)		✔	✔	✔	✔		

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Goals (Completion Date field)		✅					
Goals (Key Company Goal field)		✅					
Goals (tab)	Available ✅ Visible ✅						
Metric Data Links		✅	✅	✅	✅		
Metrics		✅	✅	✅	✅		
Performance Cycles	Available ✅ Visible ✅	✅					
Recognition (tab)	Available ✅ Visible ✅						
Reward Funds	Available ✅ Visible ✅	✅					
Reward Fund Types	Available ✅ Visible ✅	✅					
Rewards		✅					
Skills	Available ✅ Visible ✅	✅	✅				
Skill Users		✅	✅	✅	✅		

Table 12: Standard User System Permissions

System Permissions	Enabled
API Enabled	✅
Edit Events	✅
Edit Tasks	✅

Performance Cycle Manager

The Performance Cycle Manager permission set is typically used for creating and deploying performance summaries to employees.

✎ **Note:** This permission set should be assigned in addition to the Standard User permission set.

Table 13: Performance Cycle Manager Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Calibration (tab)	Available ✅ Visible ✅						
Feedback (object)		✅	✅	✅	✅	✅	✅
Feedback Questions		✅	✅	✅	✅	✅	✅
Feedback Question Sets		✅	✅	✅	✅	✅	✅
Feedback Requests (and Feedback tab)	Available ✅ Visible ✅	✅	✅	✅	✅	✅	✅
Performance Cycles	Available ✅ Visible ✅	✅	✅	✅	✅	✅	✅

Table 14: Performance Cycle Manager System Permissions

System Permissions	Enabled
Enable Work.com Calibration	✅
View Setup and Configuration	✅

Custom Badge Creator

The Custom Badge Creator permission set gives users the ability to create custom badges.

✎ **Note:**

- If the Restrict Custom Badge Creators preference is enabled, users must also have Create enabled on the Reward object.
- This permission set should be assigned in addition to the Standard User permission set.

Table 15: Custom Badge Creator System Permissions

System Permissions	Enabled
Create custom Badge Definitions	✅
Moderate Chatter	✅

Reward Creator

The Reward Creator permission set is for users who should have the ability to link badges to tangible rewards.

📝 Note: This permission set should be assigned in addition to the Standard User permission set.

Table 16: Reward Creator Object Settings

Object Name	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Reward Funds	✅	✅	✅	✅		
Reward Fund Types	✅	✅	✅	✅		
Rewards	✅	✅	✅	✅		

Table 17: Reward Creator System Permissions

System Permissions	Enabled
Create custom Badge Definitions	✅

Work.com Administrator

The Work.com Administrator permission set gives a user full administrative access to Work.com objects and features. This permission set should be assigned instead of the Standard User permission set.

Table 18: Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Available ✅ Visible ✅						
Calibration (tab)	Available ✅ Visible ✅						

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Coaching (object)		✅	✅	✅	✅	✅	✅
Coaching (tab)	Available ✅ Visible ✅						
Documents		✅	✅	✅	✅	✅	✅
Endorsements		✅	✅	✅	✅	✅	✅
Feedback (object)		✅	✅	✅	✅	✅	✅
Feedback Questions		✅	✅	✅	✅	✅	✅
Feedback Question Sets		✅	✅	✅	✅	✅	✅
Feedback Requests (and Feedback tab)	Available ✅ Visible ✅	✅	✅	✅	✅	✅	✅
Goal Links		✅	✅	✅	✅	✅	✅
Goals (object)		✅	✅	✅	✅	✅	✅
Goals (Completion Date field)		✅					
Goals (Key Company Goal field)		✅		✅			
Goals (tab)	Available ✅ Visible ✅						
Metric Data Links		✅	✅	✅	✅	✅	✅
Metrics		✅	✅	✅	✅	✅	✅
Performance Cycles	Available ✅ Visible ✅	✅	✅	✅	✅	✅	✅
Recognition (tab)	Available ✅ Visible ✅						
Reward Funds	Available ✅ Visible ✅	✅	✅	✅	✅	✅	✅

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Reward Fund Types	Available ✅ Visible ✅	✅	✅	✅	✅	✅	✅
Rewards		✅	✅	✅	✅	✅	✅
Skills	Available ✅ Visible ✅	✅	✅	✅	✅	✅	✅
Skill Users		✅	✅	✅	✅	✅	✅

Table 19: Work.com Administrator System Permissions

System Permissions	Enabled
API Enabled	✅
Create custom Badge Definitions	✅
Edit Events	✅
Edit Tasks	✅
Enable Work.com Calibration	✅
Moderate Chatter	✅
View Setup and Configuration	✅

RECOMMENDED WORK.COM PROFILES

Create different profiles for different types of Work.com users.

Create a new profile for each type of Work.com user. For more information about creating profiles, see either Work in the Original Profile Interface or Work in the Enhanced Profile User Interface Page depending on whether you have the Enable Enhanced Profile User Interface preference turned on.

📝 **Note:** Professional Edition organizations will need to grant access through existing profiles. The Work.com Only User, Chatter Only User, and Standard User profiles grant basic access to Work.com objects. The System Administrator profile grants users full administrative access to all Work.com features.

Use the tables below to assign the appropriate object settings and system permissions for each profile.

Standard User

The Standard User profile gives a user all the basic Work.com functionality.

Table 20: Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Coaching (object)		✔	✔	✔			
Coaching (tab)	Default On						
Documents		✔	✔	✔			
Endorsements		✔	✔	✔	✔		
Feedback (object)		✔	✔	✔	✔		
Feedback Questions		✔	✔	✔			
Feedback Question Sets		✔	✔	✔			
Feedback Requests (and Feedback tab)	Default On	✔	✔	✔			
Goal Links		✔	✔	✔	✔		
Goals (object)		✔	✔	✔	✔		
Goals (Completion Date field)		✔					

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Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Goals (Key Company Goal field)		☑					
Goals (tab)	Default On						
Metric Data Link		☑	☑	☑	☑		
Metrics		☑	☑	☑	☑		
Performance Cycles	Default On	☑					
Recognition (tab)	Default On						
Reward Funds	Default On	☑					
Reward Fund Types	Default On	☑					
Rewards		☑					
Skills	Default On	☑	☑				
Skill Users		☑	☑	☑	☑		

Table 21: Standard User System Permissions

System Permissions	Enabled
API Enabled	☑
Edit Events	☑
Edit Tasks	☑

Performance Cycle Manager

The Performance Cycle Manager profile is typically used for creating and deploying performance summaries to employees.

Table 22: Performance Cycle Manager Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Calibration (tab)	Default On						
Coaching (object)		☑	☑	☑	☑		

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Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Coaching (tab)	Default On						
Documents		✔	✔	✔			
Endorsements		✔	✔	✔	✔		
Feedback (object)		✔	✔	✔	✔	✔	✔
Feedback Questions		✔	✔	✔	✔	✔	✔
Feedback Question Sets		✔	✔	✔	✔	✔	✔
Feedback Requests (and Feedback tab)	Default On	✔	✔	✔	✔	✔	✔
Goal Links		✔	✔	✔	✔		
Goals (object)		✔	✔	✔	✔		
Goals (Completion Date field)		✔					
Goals (Key Company Goal field)		✔					
Goals (tab)	Default On						
Metric Data Link		✔	✔	✔	✔		
Metrics		✔	✔	✔	✔		
Performance Cycles	Default On	✔	✔	✔	✔	✔	✔
Recognition (tab)	Default On						
Reward Funds	Default On	✔					
Reward Fund Types	Default On	✔					
Rewards		✔					
Skills	Default On	✔	✔				
Skill Users		✔	✔	✔	✔		

Table 23: Performance Cycle Manager System Permissions

System Permissions	Enabled
API Enabled	✔

System Permissions	Enabled
Edit Events	✔
Edit Tasks	✔
Enable Work.com Calibration	✔
View Setup and Configuration	✔

Work.com Administrator

The Work.com Administrator profile gives a user full administrative access to Work.com objects and features.

Table 24: Work.com Administrator Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Calibration (tab)	Default On						
Coaching (object)		✔	✔	✔	✔	✔	✔
Coaching (tab)	Default On						
Documents		✔	✔	✔	✔	✔	✔
Endorsements		✔	✔	✔	✔	✔	✔
Feedback (object)		✔	✔	✔	✔	✔	✔
Feedback Questions		✔	✔	✔	✔	✔	✔
Feedback Question Sets		✔	✔	✔	✔	✔	✔
Feedback Requests (and Feedback tab)	Default On	✔	✔	✔	✔	✔	✔
Goal Links		✔	✔	✔	✔	✔	✔
Goals (object)		✔	✔	✔	✔	✔	✔
Goals (Completion Date field)		✔					
Goals (Key Company Goal field)		✔		✔			
Goals (tab)	Default On						
Metric Data Link		✔	✔	✔	✔	✔	✔

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Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Metrics		✔	✔	✔	✔	✔	✔
Performance Cycles	Default On	✔	✔	✔	✔	✔	✔
Recognition (tab)	Default On						
Reward Funds	Default On	✔	✔	✔	✔	✔	✔
Reward Fund Types	Default On	✔	✔	✔	✔	✔	✔
Rewards		✔	✔	✔	✔	✔	✔
Skills	Default On	✔	✔	✔	✔	✔	✔
Skill Users		✔	✔	✔	✔	✔	✔

Table 25: Work.com Administrator System Permissions

System Permissions	Enabled
API Enabled	✔
Create custom Badge Definitions	✔
Edit Events	✔
Edit Tasks	✔
Enable Work.com Calibration	✔
Moderate Chatter	✔
View Setup and Configuration	✔

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