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# WDC Implementation Guide

Salesforce, Spring '21





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# SET UP WDC

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

WDC 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 WDC licenses, set up WDC.

 **Note:** On May 1, 2020, we rebranded this suite. It's now called WDC. If you're looking for information about our Work.com solution in response to the COVID-19 crisis, see [Return to the Workplace with Work.com](#).

SEE ALSO:

[Configure WDC Features](#)

## EDITIONS

Available in: Salesforce Classic

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

# CONSIDERATIONS FOR SETTING UP WDC

## USER PERMISSIONS

To enable WDC 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 WDC Calibration

## EDITIONS


Available in: Salesforce Classic ([not available in all orgs](#))

**WDC** 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 WDC in your organization.

Administrators should make the decisions outlined in the [Business Decision Checklist](#) before enabling WDC.

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

 **Note:** We recommend that you enable Chatter regardless of the edition your org is using. Many WDC 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.

When using WDC features in the mobile app, you can't:

- Share goals and metrics
- Link metrics to reports
- Refresh metrics that are linked to reports
- Link parent goals and subgoals
- Add goal images
- Create custom badges
- Offer or request feedback
- View custom metric fields
- Create, fill out, or dismiss performance summaries
- Manage performance summary cycles

# ENABLE WDC

## Assign a WDC Administrator

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

If you're the administrator setting up WDC, 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 **WDC User** checkbox.
4. Click **Save**.

We strongly recommend that you create a separate WDC Administrator profile with limited access because the standard Salesforce System Administrator profile is so powerful. For more information, see the [Create Your WDC Administrator Profile](#).

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To assign a WDC administrator:

- [Customize Application](#)

## Enable WDC Features

Administrators can enable preferences for WDC features on the WDC Settings page.

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

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

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

Feature	Section	Description
Enable Thanks	<b>Thanks Settings</b>	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	<b>Thanks Settings</b>	By default, all users can create custom badges. This setting restricts badge creation to users that

### EDITIONS



Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To enable WDC features:

- [Customize Application](#)

Feature	Section	Description
		have the "Create" permission on the Reward object.
Enable Rewards	<b>Recognition Settings</b>	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	<b>Coaching Settings</b>	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 <b>Sharing Settings</b> .
Enable Manager Groups for Goals	<b>Goal Settings</b>	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 <b>Sharing Settings</b> .
Enable Calibration	<b>Perform Settings</b>	<p>Enable Calibration to see and update performance across teams and individuals.</p> <p> <b>Note:</b> For <b>Performance Edition</b> organizations, Calibration is not available for the following profiles: Contract Manager, Marketing User, Read Only, and Solution Manager.</p>
Enable Skills	<b>Skills Settings</b>	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	<b>Skills Settings</b>	<p>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.</p> <p> <b>Note:</b> Don't enable this setting if you want to use skills in Chatter profiles.</p>
Enable Automatic Skill Feed Posts	<b>Skills Settings</b>	Enable to automatically create Chatter feed posts when a user adds a new skill.
Enable Suggested Skills	<b>Skills Settings</b>	Enable Suggested Skills to have the skills widget suggest skills for users to add based on their Chatter Topics activity.


3. Click **Save**.



## WDC Feature Access

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

Administrators can grant users access to WDC 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 WDC 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 WDC Permission Sets](#) for more information about creating the proper permission sets.

If your organization has provisioned WDC Only user licenses, they come with a standard WDC 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 WDC Permission Sets](#)

Assign permission sets with WDC access to your users from Setup.

[Assign WDC Profiles](#)

Assign profiles with WDC access to your users from Setup.


## Assign WDC Permission Sets

Assign permission sets with WDC access to your users from Setup.

Before you can assign permission sets to your users, you must create permission sets with WDC access. Refer to [Recommended WDC 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:** Some permissions require users to have a permission set license before you can grant the 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 permission set.

5. Click **Save**.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### EDITIONS

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

### USER PERMISSIONS

To assign permission sets:

- [Assign Permission Sets](#)

## Assign WDC Profiles

Assign profiles with WDC access to your users from Setup.

Before you can assign profiles to your users, you must create profiles with WDC access. Refer to [Recommended WDC 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**.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS


To assign profiles:

- Manage Users

## Assign WDC Licenses

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

WDC has two types of licenses.

- WDC Only user licenses are for users who don't have a Salesforce license and will only use the WDC features in your organization.
  -  **Note:** WDC Only user licenses have limited administrator functionality. Assign WDC User Feature licenses instead for users who will be administering performance summary cycles or other WDC features.
- WDC User Feature licenses are for users who also have a Salesforce license.

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

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### IN THIS SECTION:

[Assign WDC Only User Licenses](#)

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

[Assign WDC User Feature Licenses](#)

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

## Assign WDC Only User Licenses

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

WDC Only user licenses have limited administrator functionality. Assign WDC User Feature licenses instead for users who will be administering performance summary cycles or other WDC 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 **WDC Only**.
4. Click **Save**.

## Assign WDC User Feature Licenses

Assign a WDC 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 **WDC User** checkbox.
4. Click **Save**.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To assign user licenses:

- Manage Users

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To assign user feature licenses:

- Manage Users

# CONFIGURE WDC FEATURES

## Configure WDC Features

Most WDC features require the WDC add-on, but some are freely available to Sales Cloud users. Users can access the Skills and Thanks features (excluding Rewards) without WDC. Other features require the WDC add-on.


**Table 1: WDC Features Available**

Feature	Requires WDC 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	✓

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

 **Note:** We recommend that you enable Chatter regardless of the edition your org is using. Many WDC 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 WDC 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 "WDC Settings" in the `Quick Find` box, then select **WDC Settings** and enable the relevant settings.

### IN THIS SECTION:

[Configure Thanks in the Chatter Publisher and Salesforce Mobile App Action Bar](#)

You can change the position of the Thanks action in the Chatter publisher and the Salesforce mobile app 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

Available in: Salesforce Classic ([not available in all orgs](#))

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

## Configure Thanks in the Chatter Publisher and Salesforce Mobile App Action Bar

You can change the position of the Thanks action in the Chatter publisher and the Salesforce mobile app 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 Salesforce mobile app action bar.
6. Click **Save**.

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

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### 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.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To set up quick actions:

- [Customize Application](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### [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. WDC 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**.

## 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 ([not available in all orgs](#))

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

### USER PERMISSIONS

To customize fields tracked in feeds:

- Customize Application

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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**.

## 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 ([not available in all orgs](#))

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

### USER PERMISSIONS

To customize fields tracked in feeds:

- Customize Application

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To set up which fields are tracked:

- Customize Application

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To set up which fields are tracked:

- Customize Application

## 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. WDC 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.

WDC 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.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To set field-level security:

- Manage Profiles and Permission Sets

AND

Customize Application

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

## 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 **WDC 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.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To view the Calibration tab:

- Enable WDC Calibration

# CONFIGURE WDC REPORTS AND DASHBOARDS

## Configure WDC Reports

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

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

- Custom report types for WDC objects
- Custom fields for WDC objects
- Example dashboards

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



### Note:

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

Production Packages:

- [WDC Motivate](#)
- [WDC Align](#)
- [WDC Perform](#)
- [Thanks and Skills Reports and Dashboards](#)

Sandbox Packages:

- [WDC Motivate](#)
- [WDC Align](#)
- [WDC Perform](#)
- [Thanks and Skills Reports and Dashboards](#)

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

## WDC Perform Package Details

The WDC 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.

### EDITIONS

Available in: Salesforce Classic

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

## WDC Perform Package Reports

These reports are available after installing the [WDC Perform](#) package. WDC reports are organized in folders based on features:

- WDC Coaching Reports
- WDC Goal Reports
- WDC Performance Summary Reports
- WDC Recognition Reports
- WDC Skills Reports

**Table 2: WDC 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: WDC 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
WDC Team Goals Progress	Your team's goals and their progress

**Table 4: WDC Performance Summary Reports**

<b>Report Name</b>	<b>Description</b>
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: WDC Recognition Reports**

<b>Report Name</b>	<b>Description</b>
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: WDC Skills Reports**

<b>Report Name</b>	<b>Description</b>
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

## WDC Perform Package Dashboards

These dashboards are available after installing the [WDC Perform](#) package:

- WDC Coaching Dashboards
- WDC Performance Summary Dashboards
- WDC Recognition Dashboards
- WDC Skills Dashboards

**Table 7: WDC 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: WDC Performance Summary Dashboards**

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

**Table 9: WDC 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: WDC Skills Dashboards**

Report Name	Description
Skills Dashboard	Displays skills statistics for your organization

# RECOMMENDED WDC PERMISSION SETS

Create different permission sets for different types of WDC users.

Create new permission sets for each type of WDC 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 WDC functionality.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

**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 <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>						
Coaching (object)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Coaching (tab)	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>						
Documents		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Endorsements		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Feedback (object)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Feedback Questions		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Feedback Question Sets		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Feedback Requests (and Feedback tab)	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
Goal Links		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Goals (object)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Goals (Completion Date field)		<input checked="" type="checkbox"/>					



Recommended WDC Permission Sets

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
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 WDC 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	

## WDC Administrator

The WDC Administrator permission set gives a user full administrative access to WDC 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 						

Recommended WDC Permission Sets

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

Recommended WDC Permission Sets

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Reward Fund Types	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rewards		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Skills	Available <input checked="" type="checkbox"/> Visible <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Skill Users		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>


Table 19: WDC Administrator System Permissions

System Permissions	Enabled
API Enabled	<input checked="" type="checkbox"/>
Create custom Badge Definitions	<input checked="" type="checkbox"/>
Edit Events	<input checked="" type="checkbox"/>
Edit Tasks	<input checked="" type="checkbox"/>
Enable WDC Calibration	<input checked="" type="checkbox"/>
Moderate Chatter	<input checked="" type="checkbox"/>
View Setup and Configuration	<input checked="" type="checkbox"/>

# RECOMMENDED WDC PROFILES

Create different profiles for different types of WDC users.

Create a new profile for each type of WDC 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 WDC Only User, Chatter Only User, and Standard User profiles grant basic access to WDC objects. The System Administrator profile grants users full administrative access to all WDC features.

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

## EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

## Standard User

The Standard User profile gives a user all the basic WDC 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)		✓					

## Recommended WDC Profiles

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)		✓	✓	✓	✓		

Recommended WDC Profiles

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	✓



## Recommended WDC Profiles

System Permissions	Enabled
Edit Events	
Edit Tasks	
Enable WDC Calibration	
View Setup and Configuration	

## WDC Administrator

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

**Table 24: WDC 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							

Recommended WDC Profiles

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Metrics		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Performance Cycles	Default On	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recognition (tab)	Default On						
Reward Funds	Default On	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reward Fund Types	Default On	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rewards		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Skills	Default On	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Skill Users		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Table 25: WDC Administrator System Permissions**

System Permissions	Enabled
API Enabled	<input checked="" type="checkbox"/>
Create custom Badge Definitions	<input checked="" type="checkbox"/>
Edit Events	<input checked="" type="checkbox"/>
Edit Tasks	<input checked="" type="checkbox"/>
Enable WDC Calibration	<input checked="" type="checkbox"/>
Moderate Chatter	<input checked="" type="checkbox"/>
View Setup and Configuration	<input checked="" type="checkbox"/>