SAP SuccessFactors

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Using Continuous Performance Management

THE BEST RUN SAP

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Change History

Learn about changes to the documentation for the Continuous Performance Management (CPM) guide in recent releases.

1H 2023

Type of Change	Description	More Information
New	For *Continuous Performance* on the *My Activities* view, the goal cards have action icons that are permission-based.	Visibility of My Activity Actions for Continuous Performance Goal Cards Based on Permissions [page 48]
New	Automatically hide the feedback given or requested by a previous manager from the new manager.	Enabling Features for Continuous Performance Management (Latest) [page 32] Hiding Prior Feedback from a New Manager That Was Requested or Given By the Former Manager [page 78]
Changed	A matrix manager is able to edit 1 on 1 meeting activity and make activity updates through Goal Management. A direct manager can view the list of meetings and activities on the managed employee's goal plan, but can't drill into any created through a different channel, for example the matrix manager's channel with the employee..	Understanding Meeting Channels Logic with CPM Multiple Roles Functionality [page 50]

2H 2022

Type of Change	Description	More Information
New	*Quick Actions* on the Latest Home Page now includes *Give Feedback*.	Continuous Performance Management on the Latest Home Page [page 17]
Changed	Updated character count for the Continuous Feedback topic field.	Continuous Performance Management [page 7]
New	Continuous Feedback v4 OData support for the latest version of Continuous Performance Management.	https://api.sap.com/products/SAPSuccessFactors/apis/ODATAV4

1 Checking the What's New Viewer for Announcements

As a part of our ongoing innovation, and to provide a greater user experience, we announce new features, updates to existing features, technical changes, and deprecations in the What's New Viewer.

Procedure

1. Go to the Release Information Page.
2. Open *What's New Viewer*.
3. Select the *Lifecycle* that you're interested in.
    - *General Availability* and *Early Adoption* to see new features, updates to existing features, and technical changes.
    - *Deprecation* and *Deleted* to see features that we're migrating to a new solution, that we're replacing with another solution, or that we're deleting.
4. Select other values to narrow your search or type a phrase in the search bar.

2 Continuous Performance Management

The latest version of Continuous Performance Management(CPM) provides a platform to better track and manage your performance efforts, showing activities toward goals, their achievements, and your ongoing 1:1 conversations. CPM also provides the ability for users to give, request, and receive continuous feedback from others throughout the organization.

This guide provides instructions for Continuous Performance Management.

> ⚠ Caution
>
> Only the latest version of CPM is available for new implementations. The latest version of Continuous Performance Management (CPM) is opt-in. Existing implementations can continue using the legacy version, though only the latest version is available for upgrades.
>
> Once upgrading to the latest CPM version, it **cannot** be undone. You **cannot** revert back to an older version of CPM. Please make sure that you've reviewed the feature differences before you upgrade.
>
> If you are on the legacy version of CPM and *disable* CPM via the *Performance Management Feature Settings* or Provisioning and then *re-enable* CPM, the enabled version is the **latest version**, not the legacy version.

Continuous Performance Management (CPM) helps improve employee engagement and overall workforce performance by providing more continuous dialogue between managers and employees. With this continuous approach, managers have increased visibility into employee activities and achievements, enabling them to provide guidance when it's relevant. Employees request feedback or receive feedback from anyone in their target population.

Continuous Performance fields character limits

The following Continuous Performance fields in the user interface have a 4000 character limit:

- Activity Name
- Activity Update
- Discussion topic
- Achievement Name

For Meeting Notes, because it supports HTML, the character limit is 2000, including HTML characters.

Continuous Performance Management and Multiple Roles

Organizations must adapt and respond to changing conditions - increasing the need to go beyond the traditional manager-employee relationship. Organizations need a platform for structuring these multiple roles to allow for on-going conversations while managing and tracking performance. All roles within the organization can use features within CPM to manage activities, track achievements, and support 1:1 meetings.

> ℹ Note
>
> Multiple Roles in Continuous Performance Management with Goal Management

When using the **latest** version of Continuous Performance Management (CPM) **with Multiple Roles enabled**, and the **latest** version of Goal Management:

- ONLY the employee and their line manager are able to add CPM activities from the Goal Plan.
- When an employee has a CPM channel with someone other than their line manager, neither that employee, nor anyone who isn't their line manager are able to add activities to that channel from the Goal Plan.

→ Remember

When adding activities from Goal Management, the *Create Activity* button is only available to a direct manager and employee in Goal Plan view.

The following table includes guidance for the features that require the latest CPM version.

Continuous Performance Management Features Supported by the Latest Version.

Feature	Description
Activities	Activities represent the actions being taken toward achieving goals. Achievements represent completed activities that are noteworthy. Achievements can be associated with activities, though if an activity is deleted, the associated achievement is deleted. The things you're working on may or may not be related to a goal, but they can be captured as activities. You can also request feedback on your activities. When creating an activity, a user has the option to create a new performance goal to associate to the activity and that is also added to their goal plan. Activities can be linked to performance or development goals, though only new performance goals can be created in the activities area. While creating an activity, you need to associate a status with it. Activities are sorted according to their status priorities. When the status of an activity changes to Complete, you have the option to directly create an achievement for the completed activity. Select View by Goal in the Activities view and you can edit or delete goals. You also have the option to add a new Performance Goal by choosing Create a Goal. **i Note** When a goal is deleted from activities, all references to the goal are removed. Associated activities aren't deleted when a goal is deleted. **→ Remember** As a manager, you can create, update, request feedback, or delete activities on behalf of the employees reporting to you. You can also add or remove updates from their activities.

<table>
<tr><th>Feature</th><th>Description</th></tr>
<tr><td>Achievements</td><td>The user can label a completed activity as an achievement.

An enhanced achievement experience is available. It provides an option to allow the Achievements View to be the initial CPM landing page for all users. Achievements remain linked to activities. When a user creates an achievement, a linked activity is automatically created to allow continued integration with other modules.

Note
A status is associated with an activity. In a scenario where users only create achievements, the administrator would set only 1 status value, for example, Achievement.

Users have all their achievements in 1 place.

They can share this view with other colleagues through a multiple role channel. The Achievements View is sorted by goals. Achievements can be filtered by date. Drilldown in Achievements for multiple roles is supported.</td></tr>
<tr><td>Continuous Feedback</td><td>Continuous feedback offers users a more guided, question-based approach to receive or request feedback. When requesting or giving feedback, users provide a topic and ask questions. Questions are provided out-of-the box and can be configured by the administrator. The latest version also allows users to write their own questions. The new experience makes it easier for users to feel comfortable responding with constructive feedback for a specific topic.</td></tr>
</table>

<table>
<tr><th>Feature</th><th>Description</th></tr>
<tr><td>View and Manage Feedback</td><td> Continuous Feedback helps you share your feedback directly with any employee through a channel that is integral to the solution. 3 tabs are included for viewing and managing feedback:
Feedback Received
Feedback Given
Requests Sent
Each tab includes filtering capabilities to identify specific feedback more efficiently.
Date
Linked to an activity
Shared with manager
Feedback received, given, or requested is organized in cards and include the ability to drill down into the details.
When viewing feedback received, a user can drill into the card to perform the following actions:
Make feedback visible to manager
Delete feedback
Link feedback to an activity or an achievement
Users can select the contact information of the feedback giver from their profile card as a way for following up.
When viewing feedback given, users can drill down into each card to view the specific feedback information provided to another user.
When viewing feedback requests sent, users can drill down into each card to view the date and status of the request (pending, responded, or declined). </td></tr>
</table>

Feature	Description
Request Feedback	To request feedback from others, the user can select *Request Feedback* on the Latest Home Page, or from the *Feedback* view by choosing the *Request Feedback* button. When requesting feedback, the user is presented a dialog box that structures the request. The user sees a list of suggested people for requesting feedback. The list of suggested users is based on the user's hierarchy. For example, an employee sees their manager, matrix manager (if applicable), and other team members that work with that employee. **Note** If you’ve enable the latest home page, *Request Feedback* from *Quick Actions* doesn't include suggested users. After selecting who to send the request, the user enters a topic to summarize the feedback. The new experience provides 3 questions in the default language. The user requesting feedback can use the default questions or modify the questions to align with their specific request. A user can choose up to 3 questions to ask, but must ask a minimum of 1 question to request feedback. The following character limits apply for these feedback fields in the user interface: • Feedback Topic: 200 characters • Question: 250 characters • Response: 4000 characters **Note** A user can request feedback from up to 10 people by adding multiple recipients in the *From* field. When you search for employees, their photos and job titles appear with their names. The photo and job title helps you distinguish between employees with similar names. Select the name desired. Even if you add multiple employees to the *From* field, individual requests are sent to each employee. None of the employees can tell who else received the same request. **→ Remember** The default language text can be replaced through *Manage Languages*. The text replaced language isn’t currently supported in mobile clients.

Feature	Description
Give Feedback	To give feedback to others, the user can select *Give Feedback* from *Quick Actions* on the Latest Home Page. When giving feedback, the user is presented a dialog box that structures the feedback. Being a *Quick Actions*, the user selects a single person to give feedback. After selecting a person, the user enters a topic to summarize the feedback. The user giving feedback can use the 3 default questions or modify the questions to align with the feedback they give. A user must use a minimum of 1 question when giving feedback. The following character limits apply for these feedback fields in the user interface: • Feedback Topic: 200 characters • Question: 250 characters • Response: 4000 characters
Link activities to goal plans	Because CPM is integrated with Goal Management, team-member tasks always remain aligned with team-member performance objectives. Activities can be linked to performance or development goals. **Note** A direct manager sees the list of all activities in an employee's goal plan. However, the direct manager can't drill into activities that were created through an employee's CPM channel with someone else, for example a matrix manager.

Feature	Description
Meeting View	Meeting View is supported when Multiple Roles are enabled. In the meeting view, users see a list of all current activities. Users can sort this list by status or by goal. In many organization, managers and employees have quarterly goal check-ins. They can, for example, use the *View by Goal* filter to advance and guide those discussions. The title and the details of performance and development goals, linked with the activity, are shown in the meeting snapshots. View using the *View Details* option on the action menu of the activity. The meeting view includes a tool for documenting discussion topics. You can use discussion topics to create a shared meeting agenda, or action items. You could also use discussion topics to document issues that fall outside the realm of an activity, but are still worthy of discussion. Once the meeting is complete, either the manager or the employee can capture the contents of the meeting. When you capture a meeting, Continuous Performance Management takes a snapshot of the contents of the meeting. Either attendee of the meeting can revisit the contents of the meeting in the meeting history. If you capture a meeting before an activity attached to the meeting is completed, the meeting snapshot includes the current incomplete state of the activity. You can capture the same meeting again, after the activity has been completed. The second meeting snapshot adds the new, completed state of the activity without overwriting or deleting the earlier state of the activity. The meeting snapshot includes both states of the activity, each with a unique activity ID. Capturing the meeting also confirms that the meeting occurred.
Create discussion topics	The latest version allows team members to create topics for discussion with managers or others with whom they've created a channel. Even create topics outside the scope of regular work.
Meeting Notes	The meeting view includes a section for meeting notes. Users no longer have to take personal notes outside of the solution. With the meeting notes feature, managers and employees can keep their private notes in the system. Managers and employees can refer to those notes in any subsequent 1:1 meeting. Meeting notes provide discussion continuity and alignment.

Feature	Description
Reporting	When provided the role-based permission, a user can create reports as part of SAP SuccessFactors People Analytics in the Continuous Performance Management. *Table* reports (formerly ad-hoc reporting), and *Story* reports can be created for entities within Continuous Performance Management (both legacy and the latest version). However, reporting on the latest version of continuous feedback can only be done through *Story* reports.
Receive email notifications	Receiving and responding to feedback requests. Activity updates from a manager. Receiving or requesting meeting invitations.
Access Continuous Performance Management via mobile apps	Users can access Continuous Performance Management through mobile apps.
Continuous Feedback v4 OData API to support integrations and enhancements	The v4 OData API for Continuous Feedback has been added to support third-party integrations and extensions for the latest version of Continuous Performance Management (CPM). The latest version of CPM doesn't support v2 OData APIs. Information about this API and use cases is available through the SAP API Business Hub.

Related Information

Continuous Performance Management Differences for Mobile (Latest) [page 15]

2.1 Continuous Performance Management Differences for Mobile (Latest)

The latest version of Continuous Performance Management supports the same features on SAP SuccessFactors Web and Mobile applications, but a few Continuous Performance Management features are not supported on mobile devices.

Features Not Currently Supported on Mobile Application

- Show Coaching in Meeting History
- Rich text editor
- Enhanced Achievement Experience
- Text replacement

Related Information

Continuous Performance Management [page 7]
SAP SuccessFactors Mobile product page

3 Continuous Performance Management on the Latest Home Page

Continuous Performance Management is part of SAP SuccessFactors Performance & Goals. Learn about Continuous Performance Management features on the latest home page.

Name	Description	Where Shown	When Shown	Prerequisites	On Mobile?
Create Activity	Enables you to create an activity directly from the home page. **Note** The create activity quick action ONLY creates an activity on your channel with your line manager. If you have multiple roles enabled, the quick action doesn't support creating an activity on other channels in which you're participating.	*Quick Actions*	Always shown, based on system configuration and user permission.	• The latest Continuous Performance Management is enabled. • You have *Access to Continuous Performance Management* permission. • You have *View* and *Edit Activity* permissions. • It's selected at *Manage Home Page* > *Quick Actions*.	Yes

Name	Description	Where Shown	When Shown	Prerequisites	On Mobile?
Request Feedback	Enables you to request feedback directly from the home page. **Note** This quick action only allows the request to be sent to one person at a time	*Quick Actions*	Always shown, based on system configuration and user permission.	• The latest Continuous Performance Management is enabled. • You have *Limit about whom feedback can be requested* permission. • You have *Access Continuous Feedback* permission. • You have *Request feedback from others* permission. • It's selected at *Manage Home Page* > *Quick Actions*.	No

Name	Description	Where Shown	When Shown	Prerequisites	On Mobile?
Give Feedback	Enables you to provide feedback to others directly from the Latest Home Page.	*Quick Actions*	Always shown, based on system configuration and user permission.	• The latest Continuous Performance Management is enabled. • You have *Access Continuous Feedback* permission. • You have *Give Continuous Feedback* permission. • It's selected at *Manage Home Page* > *Quick Actions*.	Yes
Activity	Displays activities you created that have been updated recently. For example, if your manager adds a comment to an activity, it appears on the home page.	*For You Today*	Appears when your manager adds comments to one of your activities. Disappears when you view the update on the card or after 30 days, if no action is taken.	• The latest Continuous Performance Management is enabled.	Yes

4 Centralized Data Protection and Privacy

Data protection and privacy features work best when implemented suite-wide, and not product-by-product. For this reason, they're documented centrally.

The *Implementing and Managing Data Protection and Privacy* guide provides instructions for setting up and using data protection and privacy features throughout the SAP SuccessFactors HXM Suite . Please refer to the central guide for details.

> **i Note**
>
> SAP SuccessFactors values data protection as essential and is fully committed to help customers complying with applicable regulations – including the requirements imposed by the General Data Protection Regulation (GDPR).
>
> By delivering features and functionalities that are designed to strengthen data protection and security customers get valuable support in their compliance efforts. However it remains customer's responsibility to evaluate legal requirements and implement, configure and use the features provided by SAP SuccessFactors in compliance with all applicable regulations.

Related Information

Implementing and Managing Data Protection and Privacy

5 Getting Started with the Latest Version of Continuous Performance Management

An overview of the implementation steps for Continuous Performance Management

Context

The following provides an overview of the implementation steps for Continuous Performance Management.

> ⚠ Caution
>
> Implementing the latest version of Continuous Performance Management (CPM) can't be undone. You can't revert back to an older version of CPM.
>
> If you're currently using the legacy version, you may continue to do so. The latest version of Continuous Performance Management (CPM) is available as an opt-in. Existing implementations can continue using the legacy version, though only the latest version is available for upgrades or new implementations.
>
> If you are on the legacy version of CPM and disable CPM via the *Performance Management Feature Settings* or *Provisioning* and then re-enable CPM, the enabled version is the latest version, not the legacy version.

Sequence	Menu Path	Comments	Links
1. Provisioning	**Enable Continuous Performance Management** — requires: Enable Generic Objects, Role-based Permission (Disabling Administrative Domains) and Enable the Attachment Manager.	i Note Only the latest version can be enabled. There's no option to choose the legacy version. When upgrading from a legacy version, please ensure you understand the differences between the latest and legacy versions before proceeding. → Remember As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For	

Sequence	Menu Path	Comments	Links
		any non-implementation tasks, contact Product Support.	
2. Enabling CPM from Admin Center	*Admin Center* > *Tools* > *Performance Management Feature Settings*	If CPM was enabled in Provisioning, you can skip this step. This procedure is only necessary when CPM is enabled using the Admin Center.	Enabling Continuous Performance Management from the Admin Center [page 24]
3. Adding the Latest Version using the Upgrade Center	*Admin Center* > *Upgrade Center*, then *Filter* by *Performance* and, under *Recommended Upgrades*, enable *Latest Continuous Performance Management*.	The Upgrade Center allows you to easily upgrade your SAP SuccessFactors HXM Core system to the latest version of CPM. **Note** Once you've upgraded to the latest version of CPM, you can NOT revert to the legacy version. Please review all of the features and differences of the latest version before upgrading.	Updating to the Latest Version Using the Upgrade Center [page 26]
4. Creating Initial Administrator Access	*Admin Center* > *Manage Employees* > *Manage Permission Roles*	You create the initial administrator to complete the implementation. **Note** Skip this step if you're upgrading from a legacy version.	
5. Select the Default View for CPM and Configure the Activities Status Labels.	*Admin Center* > *Performance Management* > *Continuous Performance Management*	Choose the default setting and modify the Activities Status Label settings to your requirements.	Allowing an Enhanced Achievement Experience (Latest) [page 38] Adding Activity Status Labels to CPM (Latest) [page 27]
6. Configure the Features Configuration section.	*Admin Center* > *Performance Management* > *Continuous Performance Management*	You enable the CPM features for your requirements.	Enabling Features for Continuous Performance Management (Latest) [page 32]

Sequence	Menu Path	Comments	Links
7. Create Role-Based Permissions for CPM.	*Admin Center* > *Manage Employees* > *Manage Permission Roles*	Enable the CPM role-based permissions for users and administrators.	Using Role-Based Permissions in Continuous Performance Management [page 42]
8. Validating the Configuration of the Latest Version of CPM	*Admin Center* > *Performance Management* > *Continuous Performance Management*	After completing the CPM configuration and settings, you run a Validate check to ensure that there are no errors.	Validating the Initial Configuration of the Latest Version of CPM [page 55]
9. Integrate with Other Modules - Goals Management.	*Admin Center* > *Goal Management* > *Manage Templates*	Select the default plans and templates and enable settings to link to CPM to other modules.	Adding CPM Integration to Goal Management [page 59]
10. Integrate with Other Modules - Development Plan.	*Admin Center* > *Development* > *Manage Templates*	Select the goal plans or templates and enable settings to link to CPM to other modules.	Adding CPM Integration to the Career Development Plan [page 62]
11. Integrate with Other Modules - Performance Management.	*Admin Center* > *Performance Management* > *Form Template Settings*	Select the templates and enable settings to link to CPM to other modules.	Adding CPM Integration to Performance Management [page 61]
12. Integrate with Other Modules - Calibration.	*Admin Center* > *Tools* > *Manage Calibration Templates*	Select the templates and enable settings to link to CPM to other modules.	Adding CPM Integration to Calibration [page 64]
13. Integrate with Other Modules - Compensation.	*Admin Center* > *Compensation Home* and select a *Compensation Plan*.	From the setting area *Allow access to Continuous Performance Management Achievement view*	Adding CPM Integration to Compensation [page 63]
14. Configure Email Notifications.	*Admin Center* > *Company Settings* > *E-Mail Notification Template Settings*	Configure and enable relevant email notifications for CPM.	Notifications with Continuous Performance Management [page 65]
15. Mobile Configuration		You need to activate the mobile application if you want to use the latest CPM on Mobile Apps.	Activating the Mobile Application

Related Information

Allowing an Enhanced Achievement Experience (Latest) [page 38]
Notifications with Continuous Performance Management [page 65]
Qualtrics Feedback for Continuous Performance Management [page 75]
Hiding Prior Feedback from a New Manager That Was Requested or Given By the Former Manager [page 78]
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Understanding Meeting Channels Logic with CPM Multiple Roles Functionality [page 50]
Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]

5.1 Enabling Continuous Performance Management from the Admin Center

You can enable Continuous Performance Management (CPM) in the Admin Center. If CPM was enabled in Provisioning, you can skip this step.

Prerequisites

- License for Performance Management and Goal Management
- Role-based permission access.

> **i Note**
>
> Enabling role-based permissions for Continuous Performance Management disables Administrative domains.

- *Intelligent Event Services*
  By default, email notification uses the Intelligent Services event framework to recognize the sending of feedback. Alternatively, if you want to send email notification for receiving feedback or responses to feedback requests, then enableIntelligent Services for your instance.

Context

If your implementation partner or support hasn't already enabled Continuous Performance Management through Provisioning, follow this procedure.

Procedure

1. Log on to the application as an administrator and go to *Admin Center* > *Tools* > *Performance Management Feature Settings*.

   The system opens the *Performance Management Feature Settings* view.
2. Check the box for *Enable Continuous Performance Management*,
3. Choose *Save*.

Results

You've enabled Continuous Performance Management. The system automatically imports the Metadata Framework (MDF) files to properly enable the solution.

Related Information

Getting Started with the Latest Version of Continuous Performance Management [page 21]
Allowing an Enhanced Achievement Experience (Latest) [page 38]
Notifications with Continuous Performance Management [page 65]
Qualtrics Feedback for Continuous Performance Management [page 75]
Hiding Prior Feedback from a New Manager That Was Requested or Given By the Former Manager [page 78]
Understanding Meeting Channels Logic with CPM Multiple Roles Functionality [page 50]
Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]

5.2 Updating to the Latest Version Using the Upgrade Center

A new user experience and additional features are available with the latest version of Continuous Performance Management. You opt in by using the Upgrade Center.

Context

The latest version of Continuous Performance Management includes a new user experience and enhanced feedback capabilities by providing a platform upon which to:

- Easily track and manage the activities working towards achieving performance goals or development goals.
- Create and share achievements while achieving those goals.
- Structure on-going 1:1 conversations.

Continuous Performance Management also provides the ability for users to give, request, and receive *Continuous Feedback* from others throughout the organization.

> ⚠ Caution
>
> Upgrading to the latest Continuous Performance Management version **cannot** be undone. You **cannot** revert back to an older version of CPM. Please ensure that you've reviewed the feature differences before you upgrade.

> → Tip
>
> We strongly recommend using the SAP Fiori 3 environment for best user experience.

Procedure

1. Launch the application and log in as an administrator.
2. Go the *Admin Center*.
3. In the *Tools* section, enter *Upgrade Center* and select.

   The *Upgrade Center* view is shown.
4. Go to *Latest Continuous Performance Management* and choose *Learn More & Upgrade Now*

   The *Latest Continuous Performance Management* dialog box is shown.

   > i Note
   >
   > Choose *Show More* and read the entire description to understand the new features and configuration requirements.
5. > ⚠ Caution
   >
   > Before you continue, once you enable the latest version, you **cannot** go back to the previous version.

Choose *Upgrade Now*.

Results

The system has been upgraded to the latest interface and new features are added. It's still necessary to enable those features in Continuous Performance Management.

Related Information

Getting Started with the Latest Version of Continuous Performance Management [page 21]
Allowing an Enhanced Achievement Experience (Latest) [page 38]
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Differences Using Legacy Version of %CPM% [page 90]

5.3 Adding Activity Status Labels to CPM (Latest)

Define the label names, status colors, and whether to prompt actions or clear the status for activities.

Context

A set of activity status names and labels is provided and can be customized.

> **i Note**
>
> You're required to select one *Activity Status* as the *Default* in the *Activity Status Label* table. This provides a default status when a user creates an activity and doesn't choose an activity status.

> **→ Recommendation**
>
> As a best practice, we recommend that you configure no more than 4 status values. The label name text should reflect the needs for your organization. Suggestions for *Activities Status Label*:
>
> - *Working on*
> - *Need Help*
> - *On Hold*

- *Complete*

Procedure

1. Log on as an administrator and go to the *Admin Center* > *Performance Management* > *Continuous Performance Management*.
   The *Continuous Performance Management Configuration* view is shown.
2. Go to the *Activities View* section and define your activity status.

   To add an additional status label, choose *+ Create New Activity Status* as the, define your choices as described in the following table, and then choose the *Save* icon that appears on your new row.

Activity Status Column	Comment
Activity Status Label	Enter the label name. Choose *Localize* to add text for other languages or label display options.
Status Color	Choose the color palette icon to select a color for the status.
Default	The default selection applied to the activity status.
Prompt Achievement Creation	Select *Prompt Achievement Creation* for a status. When a user changes their activity status to that selection, the user is prompted to create an achievement.
Clear after Capturing Meeting	Allowing the status to be cleared after capturing the meet-ing. **Note** Typically, users clear the completed activities after a 1:1 meeting capture is saved and closed. However, you may choose not to clear any of the activities. When not cleared, these activities remain visible in the Kanban board.
Delete icon	Deletes the status row. When you delete, confirm the *Warning* dialog box.

Related Information

Getting Started with the Latest Version of Continuous Performance Management [page 21]
Allowing an Enhanced Achievement Experience (Latest) [page 38]
Notifications with Continuous Performance Management [page 65]
Qualtrics Feedback for Continuous Performance Management [page 75]
Hiding Prior Feedback from a New Manager That Was Requested or Given By the Former Manager [page 78]
Understanding Meeting Channels Logic with CPM Multiple Roles Functionality [page 50]
Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]

5.4 Configuring Continuous Feedback (Latest)

The latest version of Continuous Feedback helps users share feedback directly with other employees through a channel that is integral to the solution.

Prerequisites

- The latest version of Continuous Performance Management (CPM) is enabled.
- You have administrator permission for setting role-based permissions for users.
- Go to *Admin Center* > *Tools* > *Continuous Performance Management*. On the *Continuous Performance Management Configuration* view, under the *Feature Configuration* section, ensure that *Enable Continuous Feedback* is selected. Optionally, you can choose to:
  - Enable Activity – Feedback Linking (for linking CPM Activities with Continuous Feedback).
  - Disable Deleting Feedback.
  - Enable Continuous Feedback Outlook Integration (additional configuration is required).

Continuous Feedback generates *To-Do* tasks, for example to the recipient of a request for feedback. Ensure that the *To-Do* panel is available. An administrator goes to *Admin Center* > *Tools* > *Company System and Logo Settings* and selects the checkbox for *Enable the To-Do Panel*.

Once enabled, the *To-Do* panel is available to users from any view. The panel is expanded by selecting the *To-Do icon* from the controls at the top of the interface.

Context

Although Continuous Feedback is enabled as part of Continuous Performance Management (CPM), as an administrator you can set permissions so that users only have Continuous Feedback access. If you choose that users only have access to Continuous Feedback:

- The *Continuous Performance Management* module picker isn't visible for this role.
- The role can't use any CPM features.

Adding CPM permissions for the users restores access to the features of CPM.

In addition, the permission groups or target populations you define for the Continuous Feedback role defines which employees the user can request or provide feedback.

> **Note**
>
> The following character limits apply for these feedback fields in the user interface:
>
> - Topic: 200 bytes
> - Question: 250 characters
> - Response: 4000 characters

Procedure

1. Log on as an administrator and go to *Admin Center* > *Manage Permission Roles*.
2. Either create a new role or select an existing *Permission Role*.

   The *Permission Role Detail* view is shown.
3. Choose the *Permissions...* button.
4. Go to *User Settings* > *Continuous Performance User Permission* and make the following entries:

Permission	Comments
Access to Continuous Performance Management	Select for providing access to all features of CPM and Continuous Feedback. If this role only needs access to Continuous Feedback, leave unselected.
Access Continuous Feedback	Provides users access to Continuous Feedback.
Give Continuous Feedback	Allows the role to provide feedback to their defined target population.
Request feedback from others	Allows the role to request feedback from employees within the defined target population.
Limit about whom feedback can be requested	Restricts the role from requesting feedback from the defined permissions groups or users.

   > i Note
   >
   > For the full functionality of Continuous Performance Management, users need additional permissions.

5. (Optional) Add other permissions required for the role.
6. Choose *Finished* to close the dialog box.

   > i Note
   >
   > These permissions require a *Permission Group* or *Target Population* defined. You define those target populations on the *Permission Role Details* and then *Grant this role to.* You then add the assignments and *Make Active*.

7. Choose *Save Changes*.

5.5 Using Continuous Feedback in the SAP SuccessFactors App

Guide your employees through the procedure of requesting or giving feedback through the SAP SuccessFactors app in Microsoft Teams.

Prerequisites

- You have a Performance & Goals license.
- The latest Continuous Performance Management is enabled.
- The Continuous Feedback feature is enabled.
- Extended integration between SAP SuccessFactors and Microsoft 365 is enabled.
- Employees have the following permissions:
    - *User Permissions* > *Continuous Performance User Permission* > *Give Continuous Feedback*
    - *User Permissions* > *Continuous Performance User Permission* > *Request feedback from others*
- Employees have the SAP SuccessFactors app installed in their Teams client.

Context

To ensure easy access to SAP SuccessFactors in Teams, it's recommended that you pin the SAP SuccessFactors app to the app bar or as a message extension in the compose message area.

Procedure

1. In the app bar or the compose message area of any chat, choose the app icon.
2. Choose *Request Feedback* or *Give Feedback* as needed.
3. Fill in mandatory fields and choose *Send*.

Results

The SAP SuccessFactors app sends activity feed notifications or desktop notifications to employees when they receive feedback or feedback requests.

In both these scenarios, as well as after employees give feedback, the app sends adaptive cards to its bot chat so that employees can view more details or navigate to their SAP SuccessFactors system.

Related Information

How-To Video: Request and Give Feedback in Microsoft Teams
Enabling Extended Integration with Microsoft 365
Enabling Continuous Performance Management from the Admin Center
Configuring Continuous Feedback (Latest)

5.6 Enabling Features for Continuous Performance Management (Latest)

You can choose to enable or disable certain features in Continuous Performance Management.

Prerequisites

You've enabled the latest version of Continuous Performance Management.

Context

As an administrator, you can decide which features of Continuous Performance Management (CPM) to enable.

> → Remember
>
> Specific role-based permissions (RBP) are required for using or administering CPM. Your system likely has RBPs for employees, managers, and administrators. You can create specific permission roles for CPM or add the necessary permissions to your existing roles. For more information, see the *Using Role-Based Permissions in Continuous Performance Management* topic.

Procedure

1. Log on as an administrator and go to the *Admin Center* > *Performance Management* > *Continuous Performance Management*.
   The *Continuous Performance Management Configuration* view is shown.
2. On the *Feature Configuration* section, enable or disable a feature by either selecting or clearing the feature checkbox.

Option	Description
Enable "Discussion Topics"	Allows employees and managers to create and track topics they want to discuss together. **Note** The *Discussion Topics* feature is available for Continuous Performance Management role-based permissions only when you've selected *Enable "Discussion Topics"*.
Enable Meeting Notes	Allow employees and managers to take notes in a 1:1 meeting.
Enable Continuous Feedback	Allows employees to give feedback to and request feedback from colleagues. **Note** *Continuous Feedback* is available for Continuous Performance Management role-based permissions only if you select the *Enable Continuous Feedback* option.
Enable Activity - Feedback Linking	Allows employees and managers to request feedback on activities and to link feedback messages to activities.
Disable Deleting Feedback	Prevents users from deleting feedback they've received.
Enable Continuous Feedback Outlook Integration (Step 1 of 2)	This feature allows users to provide continuous feedback from a Microsoft Outlook add-in. If you select this feature and then *Save Configuration* changes, the second step is activated. Once the configuration is saved, the file from *Download Outlook file (Step 2 of 2)* is available to download. For the full instructions on downloading a file to create the Outlook add-in, see the *Enabling Outlook Integration with Continuous Performance Management* topic in this guide. **Note** The Outlook add-in has a prerequisite requiring that you map SAP SuccessFactors user attributes to Microsoft Active Directory.
Enable Multiple Role Support	This feature expands Continuous Performance Management functionality to be used by roles other than the manager and their direct reports. A user can invite another user to a 1:1 meeting and create activities and discussion topics together. To enable this feature, you must configure the respective target population permissions.
Hide the meeting histories of previous managers from the new manager	This option enables the meeting histories between a direct report and their previous managers to be hidden from the new manager. The new manager is shown only their own meeting histories with their current direct reports. Direct reports are shown all meeting histories with their current and previous managers.
Automatically Hide Prior Feedback Requested or Given by Former Manager from the New Manager	This option enables the feedback requested or given by a previous manager to be automatically hidden from the new manager. **Note** This feature currently only supports Employee Central (EC)-enabled scenarios. When a manager transfer occurs, a new manager isn't entitled to see feedback from a former manager or requested on behalf of the former manager without the employee's authorization. This option supports the data privacy and protection concern by automating the process of hiding feedback.

Option	Description
	• **Selecting the checkbox** automatically hides the previous manager's feedback from the new manager when a change in manager is detected. • **Leaving the selection unchecked** enables the previous manager's feedback to be shown. The employee has the option to manually hide or delete that feedback from the new manager. ℹ Note When this feature is enabled, the functionality isn't applied retroactively and only applies to manager changes after switching on the feature. When a manager transfer occurs and feature switch is enabled: • The feedback given by former manager and requested on employee's behalf of the former manager is automatically hidden from the new manager. • The employee can manually choose to make visible to the new manager the feedback given by former manager and feedback requested on employee's behalf . • The employee may delete feedback given by former manager. • The employee may delete the feedback requested on employee's behalf by the former manager **Important considerations**: • The employee can't hide or delete feedback when a former manager becomes the new manager. Feedback given by the former manager and requested by them on employee's behalf becomes automatically visible to that manager. If the employee has deleted that feedback by the former manager before they return as the new manager, that feedback is gone and doesn't come back for the returning manager. • The former manager continues to see feedback given to the former managed employee, as well as feedback given on the employee's behalf. • A requested feedback provider continues to see the feedback they gave. ⚠ Caution Hiding Feedback given by former manager is not supported if you change managers multiple times for an employee within one day.

3. Choose *Save Configuration*.

> → Remember
>
> If you enable or disable features and receive a confirmation that the change was successful, then the system performs one additional action (metadata refresh) before your selected configuration is reflected in Continuous Performance Management.

Related Information

Getting Started with the Latest Version of Continuous Performance Management [page 21]
Allowing an Enhanced Achievement Experience (Latest) [page 38]
Notifications with Continuous Performance Management [page 65]
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Hiding Prior Feedback from a New Manager That Was Requested or Given By the Former Manager [page 78]

Understanding Meeting Channels Logic with CPM Multiple Roles Functionality [page 50]
Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]
Enabling Add Attachments to Activities (Latest) [page 35]
Enabling Achievements as the Default View for Continuous Performance Management (Latest) [page 40]

5.6.1 Enabling Add Attachments to Activities (Latest)

The administrator configures the system to allow users to add attachments.

Prerequisites

- The latest version of Continuous Performance Management is enabled.
- You selected the *Enable Attachments on Activities* checkbox in the *Continuous Performance Management Configuration* area.

Permissions

Context

Continuous Performance Management (CPM) uses *Activity* and *Meeting* to track performance. By allowing attachments, users are able to upload files to provide additional context or to demonstrate work done in association with the activity.

> **i Note**
>
> In the latest version of Goal Management, you can create an activity to link to a goal, but you can't add an attachment from that dialog box.

Supported Behavior

- A user adds an attachment to their own activity or to an activity created on their behalf (either by their manager or a channel owner).
- A user can see that an activity has an attachment to the Kanban Board activity tile (shown as an attachment icon).
- A user can download an attachment they uploaded.
- A user can download an attachment added by a line manager or channel owner.
- Able to delete an attachment they added to an activity.
- Any user with *Edit* permission can delete another user's attachment on a shared activity. For example, an activity created on behalf of the employee by a line manager or channel owner.
- Able to view/download attachment in Meeting History.
- Attachments can't be deleted from an *Activity* in a *Meeting History* that has been archived.

i Note

The Latest Home Page includes a *Quick Action* to *Create Activity*, when enabled on *Manage Home Page* of the *Admin Center*. However, it isn't possible to add an attachment when creating an activity using that *Quick Action*.

→ Remember

It isn’t possible to build a report on attachments for *Activities* in Continuous Performance Management.

File Types

The following types are supported for attachments:

- BMP
- DOC
- DOCX
- GIF
- HTM
- HTML
- JPG
- JPEG
- PDF
- PNG
- PPT
- PPTX
- RTF
- TXT
- XLS
- XLSX

File Size Supported

A maximum of five attachments per activity is allowed. Allocations for file size and storage are defined at the company level and set in your document management services in Provisioning.

→ Remember

As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

Procedure

1. Log on as an administrator and go to *Admin Center* > *Tools* > *Manage Permission Roles*
2. Select the role to grant permission and on the role details view, choose *Permission...*
3. Go to *User Permission* > *Continuous Performance*. Ensure the roles for adding attachments are granted permission:

User Permission	User can...
Activity Visibility : View **Action : Edit**	This role has permission to upload and download attachments.
Activity Visibility : View	This role can only download attachments.

> **i Note**
>
> When an employee creates an Activity and links to a performance goal from Goal Management, the goal permissions for editing and deleting are inherited from the Goal Plan Templates

4. Choose done to close the dialog box.
5. Choose *Save Permissions* to save your changes.

Next Steps

Steps to add an attachment to an activity.

1. Sign on as a user and go to *Continuous Performance*.
2. Select the *Active Channel* to add the activity and choose *Create Activity*.
3. In the *Create Activity* dialog box, enter an *Activity Name* and other activity parameters.
4. Choose *Add* in the *Attachments* area and then select a file from your system's document browser.
5. Choose *Save* to upload the file.

The file name, size, added on date, and information about the user who added the file are shown in the attachment area.

Related Information

Getting Started with the Latest Version of Continuous Performance Management [page 21]
Allowing an Enhanced Achievement Experience (Latest) [page 38]
Notifications with Continuous Performance Management [page 65]
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Hiding Prior Feedback from a New Manager That Was Requested or Given By the Former Manager [page 78]
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5.6.2 Allowing an Enhanced Achievement Experience (Latest)

You have the option to allow users to focus on achievements using Continuous Performance Management (CPM).

In the legacy version of Continuous Performance Management (CPM), it was possible to create stand-alone achievements. The latest version of CPM initially allowed users to add achievements after creating an *Activity*. For the 2H 2021 release, settings can allow users can create an achievement first.

For CPM, activities and achievements are designed to work together.

- An *Activity* represents something someone is working on in support of their goals and they can track their activities' status on a Kanban board.
- An *Achievement* is the completion of an activity.

The 2H 2021 version of CPM allows configuration flexibility. You can change the default view of CPM to *Achievements to* allow users to directly add an achievement. The default selection changes the initial view for all CPM users.

> → Remember
>
> The selection of the initial view is applied to all CPM users.

	Achievements Default View	Activities Default View
UI	The *Achievements* view is shown when using the *Continuous Performance* module picker. Both *Achievements* and *Activities* views are available.	The *My Activities* view is shown when using the *Continuous Performance* module picker. Both *Achievements* and *Activities* views are available.
Achievements	Users can add new achievements on the *Achievements* view.	In the Activities scenario, when the activity status is changed to completed or accomplished, an additional field is shown in the activity dialog box, *Mark as an achievement*.
Activity Status	Activity Status labels are set to track the progress of activities. Achievements don't use status labels. When a user creates a new achievement, a new activity with the same information is automatically created. That activity has the Activity Status set to Completed. It's possible to edit the status of the activity. (Optional) If you're only using achievements, you can configure a single Activity Status.	A default of Activity Status labels is available to track progress. Activities toward goals are created by employees and assigned a status. The activity status they select is shown in a Kanban board that provides an easy, organized way to show progress toward goals.

	Achievements Default View	Activities Default View
Multiple Roles	Drilldown into achievements in a shared channel (as granted by permission). Users can edit Achievements in a shared channel (as granted by permission).	Drilldown into achievements and activities in a shared channel (as granted by permission).
Integration	Creating an achievement automatically creates a same name activity for integration with other modules, for example, Goals.	Actions are integrated with other modules.
Permissions	Even in an Achievements scenario, users must have View and Edit permissions for both Activities and Achievements. Without those Activities permissions, the user can't create an Achievement. If you only grant *View* permission for *Activity*, the *Create Achievements* button isn't available, even if the *View* and *Edit* permission to *Achievement* is granted. (When adding an achievement, a same-name activity is also created for integration purposes.)	CPM permissions to access, view, and edit achievements and activities.
Goals	Achievements can be filtered by Performance Goals or Development Goals.	Activities filtered by Status or filtered by Performance Goals or Development Goals.
File Attachments	No files can be attached to achievements.	Files can be attached to activities.

Related Information

Getting Started with the Latest Version of Continuous Performance Management [page 21]
Enabling Continuous Performance Management from the Admin Center [page 24]
Updating to the Latest Version Using the Upgrade Center [page 26]
Adding Activity Status Labels to CPM (Latest) [page 27]
Enabling Features for Continuous Performance Management (Latest) [page 32]
Enabling Add Attachments to Activities (Latest) [page 35]
Enabling Achievements as the Default View for Continuous Performance Management (Latest) [page 40]
Using Role-Based Permissions in Continuous Performance Management [page 42]
Adding Target Populations for Multiple Roles in Continuous Performance Management [page 46]
Validating the Initial Configuration of the Latest Version of CPM [page 55]
Enabling Outlook Integration with Continuous Performance Management [page 73]
Removing CPM Feedback Data as an Administrator [page 76]
Changing the Default Language for Continuous Performance Management [page 84]
Capturing Meeting Notes for 1:1 via the Web Application (Latest Version) [page 86]

Adding, Editing, or Deleting a Performance Goal to the Goal Plan (Latest) [page 87]
Understanding Meeting Channels Logic with CPM Multiple Roles Functionality [page 50]
Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]
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Using Role-Based Permissions in Continuous Performance Management [page 42]

5.6.3 Enabling Achievements as the Default View for Continuous Performance Management (Latest)

An administrator can select the Achievements view as the initial view for all Continuous Performance Management users.

Prerequisites

- The latest version of Continuous Performance Management is enabled.
- You have administrator permission to configure Continuous Performance Management settings.

Context

The latest version of Continuous Performance Management (CPM) has the *Activities* view as the default view when users open CPM. To allow configuration flexibility, you can change the default view of CPM to *Achievements*.

The option changes the initial view for all CPM users. Achievements can be linked to activities. Users can link continuous feedback.

> **Note**
>
> The selection of the initial view is applied to all CPM users.

Procedure

1. Log on as an administrator and go to *Admin Center* > *Tools* > *Continuous Performance Management*.

   The *Continuous Performance Management Configuration* view is shown.
2. Under the *General Configuration* section, make a selection for the *Default View*:

Choice	Comments
Activities View **(default)**	This selection is the initial, default setting for the CPM landing page. Enabling this selection makes the *Activities View* the default landing page for all CPM users. Users must have at least permissions to view *Activities* to see this page.
Achievements View	Choosing this selection makes the *Achievements View* the default landing page for all CPM users. Users must have, at least, view permissions for both *Achievements* and *Activities*.

3. Choose *Save Configuration*.

Next Steps

Enabling *Achievements* changes the default view for all CPM users. What they see and how they can interact with CPM is determined by their role-based permissions.

Related Information

Getting Started with the Latest Version of Continuous Performance Management [page 21]
Allowing an Enhanced Achievement Experience (Latest) [page 38]
Notifications with Continuous Performance Management [page 65]
Qualtrics Feedback for Continuous Performance Management [page 75]
Hiding Prior Feedback from a New Manager That Was Requested or Given By the Former Manager [page 78]
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5.7 Using Role-Based Permissions in Continuous Performance Management

The role-based permissions (RBP) assigned to you determine your data access rights in Continuous Performance Management (CPM). The following provides an overview of considerations when creating RBP for CPM.

Context

Specific role-based permissions (RBP) are required for using or administering CPM. Your system likely has RBPs for employees, managers, and administrators. You can create specific permission roles for CPM or add the necessary permissions to your existing roles.

The following SAP SuccessFactors Platform guides provide the information for setting up and maintaining role-based permissions (RBP).

- *Implementing Role-Based Permissions*
- *Using Role-Based Permissions* (this guide includes *List of Role-Based Permissions* that includes those permissions for Continuous Performance Management).
- *Setting Up and Using Data Protection and Privacy* that includes *Running the Information Report* that provides the permissions required when compiling reports containing personal information.

Multiple Roles and RBP

The latest version of Continuous Performance Management (CPM) enables multiple roles, allowing roles outside of the traditional manager/employee hierarchical relationship to use the features and functions. Who and how they can interact is defined by the target populations for the assigned permission role.

A target population is a group of users whom the assigned permission role has been granted to define and control more easily the permission roles of a group of employees. You specify target populations after you're done selecting permissions.

Special Considerations

> i Note
>
> The *Field Level Overrides* permissions aren't supported for Continuous Performance Management.

> → Remember
>
> The following list isn't all of the permissions that users or administrators need to use your system. The entire list of role-based permissions is in *List of Role-Based Permissions* in the *Using Role-Based Permissions* guide.

Who is the permission for?	Permission Location	Permission Name	Results and Comments
Admin Users	Employee Data	Set the target population to your requirements and grant the *View* permission to these fields: *First Name, Middle Name, Last Name, Title*, and *Manager*. **Note** These employee fields could be configured with different labels for your organization. Refer to your employee data model for the correct field labels.	This permission allows the users to search for others when requesting feedback.
Admin Users	Manage Continuous Performance	Admin Access to all Continuous Performance Management Data	This permission is necessary for users to create and run reports in People Analytics. This permission is also required for Data Protection Officers (DPO) for creating and running a Data Subject Information report for given subject users.
Admin	Manage Continuous Performance	Admin Access to Delete Continuous Feedback Page	SAP recommends creating a specific and separate administrator role for this permission.
Admin Users	Continuous Performance Management	Activity	To grant this role permission to *upload and download attachments*, select the following: *Activity* Visibility : View Action : Edit
Users	Continuous Performance Management	Activity	To grant this role permission to *only download attachments*, select: *Activity* Visibility : View

Who is the permission for?	Permission Location	Permission Name	Results and Comments
Admin Users	Continuous Performance Management	Achievement	To grant this role permission to view, add, or edit, select: *Achievement* Visibility : View Actions : Edit
Users	Continuous Performance Management	Achievement	To grant this role permission to only view, select: *Achievement* Visibility : View
Admin Users	Continuous Performance Management	Discussion Topic	To grant this role permission to view, add, or edit, select: *Discussion Topic* Visibility : View Actions : Edit
Users	Continuous Performance Management	Discussion Topic	To grant this role permission to only view, select: *Discussion Topic* Visibility : View
Admin Users	Goals	Access to Continuous Performance Management Data	The *Access to Continuous Performance Management Data* permission is bound by target population. For employees and managers to interact smoothly, ensure that the target population for employees includes *Self*, and the target population for managers includes *Direct Reports*, and *Self*. With the availability for Multiple Roles, ensure the target population includes these users.
Admin Users	General User Permissions	Organization Chart Navigation Permission User Search Company Info Access	For CPM, you define target populations to apply to these permissions.

Who is the permission for?	Permission Location	Permission Name	Results and Comments
Admin Users	Continuous Performance User Permission	Access to Continuous Performance Management Access Continuous Feedback Give Continuous Feedback Request Feedback from Others Limit about whom feedback can be requested	Depending on your requirements, some or all of the permissions could be granted to roles. You further refine the permission by defining a target population.
Admin Users	Metadata Framework	Access to nonsecured objects.	**Note** Continuous Performance Management requires the *Access to nonsecured objects* permission to allow users to write and read the data from MDF tables. However, this permission doesn't grant the Users access to *Admin Center* in the module picker.
Admin Users	Reports Permission	Report Center Create Story	SAP SuccessFactorsPeople Analytics is the overall solution for reporting. Providing permission to the *Report Center* allows access to reporting. To create CPM-specific reports for the latest version, the *Create Story* permission allows *Story* type reports.

Procedure

1. Go to the *List of Role-Based Permissions* topics in the *Using Role-Based Permissions* guide.
2. On the list table, *Filter* the *Solution* column by *Continuous Performance Management*.
3. Add or modify those permissions in the *Admin Center* > *Tools* > *Manage Permission Roles* for CPM roles based on your requirements.

Related Information

Getting Started with the Latest Version of Continuous Performance Management [page 21]
Allowing an Enhanced Achievement Experience (Latest) [page 38]
Notifications with Continuous Performance Management [page 65]
Qualtrics Feedback for Continuous Performance Management [page 75]
Hiding Prior Feedback from a New Manager That Was Requested or Given By the Former Manager [page 78]
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Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]
Visibility of My Activity Actions for Continuous Performance Goal Cards Based on Permissions [page 48]
Adding Target Populations for Multiple Roles in Continuous Performance Management [page 46]
List of Role-Based Permissions
Implementing Role-Based Permissions

5.7.1 Adding Target Populations for Multiple Roles in Continuous Performance Management

Define how a role is granted access to others.

Prerequisites

- The latest version of Continuous Performance Management is enabled.

  > ⚠ Caution
  >
  > Using multiple roles requires upgrading to the latest version of Continuous Performance Management (CPM). Upgrading to the latest CPM version **cannot** be undone. You **cannot** revert back to an older version of CPM. Please make sure that you've reviewed the feature differences before you upgrade.
- You have the administrator rights to create and modify permission roles.
- Permission groups are created and available, if necessary.

Context

The latest version of Continuous Performance Management (CPM) enables multiple roles, allowing roles outside of the traditional manager/employee hierarchical relationship to use the features and functions. An administrator defines target populations for the *Permission Role*. A target population is a group of users whom the Permission Role has been granted access. The target population defines and controls, more easily, the permission roles of a group of employees.

You create and define roles and permission groups in your organization based on your own requirements. The following steps describe creating new a *Permission Role* for CPM with a target population. Consider your requirements to define specific target populations for each of your multiple roles: managers, matrix managers, facilitators, individual contributors, and so on.

> **i Note**
>
> The *Field Level Overrides* role permissions aren't supported for Continuous Performance Management.

> **→ Remember**
>
> There some roles, for example a matrix manager or other kinds of managers that interact with others beyond direct reports, that could be assigned multiple access roles for those different target populations.

Procedure

1. Log on as an administrator and go to *Admin Center* > *Tools* > *Manage Permission Roles*.

   The *Permission Role List* view is shown.
2. Choose *Create New*.

   The *Permission Role Detail* view is shown.
3. Enter the following

Field	Entry
Role Name	<add a meaningful role name>
Description	<add a meaningful description>

4. Under *Permission Settings*, specify the permissions for this role by choosing the *Permission...* button.

   The *Permissions Settings* dialog box is shown.
5. Go to *User Permissions* > *Continuous Performance User Permission* and select *Access to Continuous Performance Management*. This permission allows the role to access to CPM for their target population
6. Go to *User Permissions* > *Continuous Performance Management* and depending on your requirements for the role, choose the following:

Permission Name	Allow
Achievement	View and Edit
Activities	View and Edit
Discussion Topics	View and Edit

7. Choose *Done* to close the dialog box.
8. Go to *Grant this role to...* and choose *Add*.
9. Define whom you want to grant this role permission to by using the dropdown menu to select a *Permission Group* or a choice ofr managers, or everyone.
10. Specify the target population whom the granted users have permission to access with your selections. Your choices of, for example, by *Granted User's Company*, *Granted User's Business Unit*, *Granted User (Self)* and so on, or assigning *Permission Groups* define the access. For example:

- A manager target population includes the *Granted User (Self)*, their direct reports, plus any others that they can send requests. For example, when also a collaboration facilitator for others.
- Individual contributors target population includes the *Granted User (Self)*. It also includes any others to whom they connect with and send meeting requests, for example, based on their location or business unit.

> **i Note**
>
> When assigning *Everyone*, consider security or performance before proceeding.

11. Choose *Done*.
12. In the *Grant this role to...* area, choose *Make active*.

> **i Note**
>
> Your granted permissions must be activated.

13. Choose *Save Changes*.

Related Information

Getting Started with the Latest Version of Continuous Performance Management [page 21]
Allowing an Enhanced Achievement Experience (Latest) [page 38]
Notifications with Continuous Performance Management [page 65]
Qualtrics Feedback for Continuous Performance Management [page 75]
Hiding Prior Feedback from a New Manager That Was Requested or Given By the Former Manager [page 78]
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Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]
Using Role-Based Permissions in Continuous Performance Management [page 42]
Visibility of My Activity Actions for Continuous Performance Goal Cards Based on Permissions [page 48]
Assigning Target Populations to a Role

5.7.2 Visibility of My Activity Actions for Continuous Performance Goal Cards Based on Permissions

The employee is shown action icons for linked goals in My Activities that correspond to their permission level.

Prerequisites

- The latest version of Continuous Performance Management is enabled and users have access to *My Activities* view.
- The latest version of Goal Management is enabled.
- The employees have an active Goal Plan in Goal Management.

Employees have more control over their *Performance Goals* by creating, editing, or deleting those goals directly in Continuous Performance Management (CPM). When the goal isn't created in CPM, but linked from Goal Management, any actions for *Performance Goals* by the CPM user are based on the permissions setup in the Goal

Plan. When an employee takes action in CPM with goals, it automatically adjusts the goal plan in Goal Management. The action icons that the employee is shown reflect their permission level.

> → Remember
>
> When you delete the Goal, you are *not* deleting any of the associated Activities. Deleting the Goal removes it from your Goal Plan, as well as from your Activities view. Any activities under the deleted goal are retained and moved to the *Not Linked to Goals* column.
>
> To modify an Activity linked to a Goal, you select the Activity, which opens a new view with *Activity Details*. Separate Edit and Delete options are available for the selected Activity.

There are three different access views of the Goal card in *My Activities*:

Action Permitted	Icon Shown	Comments
Edit Only	*Edit*	The employee only has permission to edit the goal linked to the activity. Selecting the icon opens a dialog box and edits change the Goal Plan.
Delete Only	*Delete*	The employee only has permission to delete the goal linked to the activity. Selecting the icon removes the goal from the activity and also deletes the goal from the Goal Plan. Once the linked goal is deleted, the activity moves to the *Not Linked to Goals* column. .
Edit and Delete	∘∘∘ *More* and the dropdown provides choice of *Edit Goal* or *Delete Goal*.	When the employee has permission, they can choose to edit and delete those goals from Continuous Performance Management

Permissions

The following describes permissions as they relate to the visibility of action icons for *Goal* cards in *My Activities* in *Continuous Performance*.

Continuous Performance Management

- The user has the *User* > *Continuous Performance User Permission* > *Access to Continuous Performance Management* permission.
- The user has the *User* > *Continuous Performance Management* > *Activity* permission. The user has permission to *View* the *Visibility* item and to *Edit* the *Actions* item
- The user has the *User* > *Goals* permission with *Access to Continuous Performance Management Data* and *Goal Plan Permissions* for their *Goal Plans*.

Goals Management

The permissions of available actions on a goal in Continuous Performance Management is consistent with what you experience in Goal Managementt, respecting the configuration of a current goal plan template. Goal Management uses field permissions (edit) and action permissions (delete) for each goal plan template in XML only. For more information about managing Goal Management permissions, see the *Related Links* for **Field Permissions** (read and write) and **Action Permissions** (delete).

Related Information

[Using Role-Based Permissions in Continuous Performance Management [page 42]](#)
[Adding Target Populations for Multiple Roles in Continuous Performance Management [page 46]](#)
[Implementing and Managing Goal Management - Field Permissions](#)
[Implementing and Managing Goal Management - Action Permissions](#)

5.8 Understanding Meeting Channels Logic with CPM Multiple Roles Functionality

Answers to questions about how Meeting Channels work with multiple roles in Continuous Performance Management (CPM).

Context

With the latest version of Continuous Performance Management (CPM), employees can set up channels outside the traditional manager/direct report hierarchy. The logic behind the multiple roles is similar to that of the manager/employee channel in the legacy version of CPM, extended to allow for other relationships.

With multiple role support enabled, there's a Meeting Channel owner (similar to a manager role) and Meeting Channel participant (similar to employee role). The meeting subject is able to link *Activities* and *Feedback* to their goals. The meeting owner won't be able to link those *Activities* created in the channel to their own goals.

> **i Note**
>
> When multiple roles are active, *Achievements* can't be edited.

Through role-based permissions (RBP), the administrator creates specific RBP roles for the different roles in the organization that would likely initiate multiple roles channels. For example, creating a specific RBP role for matrix manager, allows the matrix managers to initiate the channel with their matrix reports.

The Active Channels column is hidden for employees or managers?

Role-based permissions control whether the **Active Channels** column is visible to users. When setting up permissions for roles, Continuous Performance Management features require a **Target Population** setting, which is the defined group of employees with whom the role-granted user can create channels. If the role has the target population set to **Granted User (Self)**, then the **Active Channels** column doesn't appear for anyone with that role. To expand the **Target Population** beyond **Granted User (Self)**, but less than **Everyone (All Employees)**, for example, you could set the target population to *Granted User's Department* for access to others in the employee's department. Work with SAP Professional Services or your SAP partners if you need guidance defining target populations for your role-based permissions.

If an employee links an Activity to a Goal in Goal Management, who can see that Activity in CPM?

If an employee adds an activity to a goal in the performance goal plan of Goal Management, the activity linked to the goal appears in the employee's Continuous Performance Management channel. The employee's direct manager sees the activity on the goal plan but can only drill into an activity from the goal plan if they co-own the activity. When the activity was created in a meeting channel with another employee, for example a matrix manager, they can see the activity on the goal plan and drill into that activity in their channel in CPM.

When employee B joins a Meeting Channel with employee A and then employee B links an Activity to their default Goal plan, who can see the Activity in the goal plan?

A matrix manager (employee A) with role-based permissions can also view all activies in a shared goal. To drill into an activity from the goal plan is only available in the meeting channel between the co-owners of the activity: employee A and employee B. The direct manager sees ALL activities linked to employee B's default goal plan, including those that were added from other channels not owned by the manager, though the direct manager can't drill into those activities.

Is it possible to set up a Meeting Channel in such a way that Actitivies/Goals can be created or linked for both the Meeting Channel owner and the Meeting Channel participant?

No, only the *Activities* and *Goals* of the Meeting Channel *participant* are shown in the shared channel, not those of the Meeting Channel owner.

If employee A invites employee B to join a Meeting Channel and employee B links an Activity to a Goal, who can see the Activity?

Both the Meeting Channel owner (employee A) and the Meeting Channel participant (employee B) sees the activity in their shared channel as well as the manager of employee B.

Because the activity also appears in employee B's personal goal plan, the manager of employee B has permission to view the goals and relevant information within the employee's goal plan. The manager is able to see ALL activities linked to the goal (including those that were added from a separate channel not owned by the line manager). The direct manager can't drill into the activity details for activities added in a separate channel.

Employee A invites employee B to join a Meeting Channel. When employee A creates Activities or Achievements, who is the owner of those Activities and Achievements?

The Meeting Channel participant (employee B) is the owner.

The Meeting Channel owner (employee A) can create *Activities* and *Achievements* then link goals to those *Activities* for the Meeting Channel participant (depending on role-based permissions and target population for those permissions). However, the Meeting Channel participant (employee B) is considered the owner of the *Activity* or *Achievement*.

If employee A invites employee B to join a Meeting Channel, will employee B be able to link Activities created in the shared channel to goals from employee A's default goal plan?

No, the Meeting Channel owner's (employee A) goals won't be available to link to *Activities* in the shared channel. Only the Meeting Channel participant's (employee B) goals can be linked to *Activities* via the shared channel.

Similarly, in a shared channel, it's only possible to create goals for the Meeting Channel participant's (employee B) default goal plan.

Is it possible for employee B to view the Achievements of employee A?

No, it isn't possible. The Meeting Channel owner (employee A) can view the *Achievements* of the Meeting Channel participant (employee B), but the participant can't view the Meeting Channel owner's (employee A) *Achievements*.

Is it possible for employee B to initiate another Meeting Channel with employee A, if they already share a channel?

No, it isn't possible to initiate another meeting channel when a meeting channel already exists between two users. For example, employee B can't request a meeting channel with employee A if one already exists.

Is it possible to report on the 1:1 Meetings between Multiple Roles users?

No, it isn't possible to create a report on 1:1 Meetings between Multiple Roles. A Story report on 1:1 Meetings can only be created for those meetings between a manager and a direct report.

Is it possible to share Activities created in a Meeting Channel between an employee and their manager to a channel shared between the employee and another user (nonmanager)?

No, the *Activities* created in the manager/direct report channel can't be shared to any other channel in the Active Channels list.

Is it possible for Meeting Channel owners to request feedback on the Activities created for the Meeting Channel participant?

No, only direct managers can request feedback on *Activities* within their shared channel.

> → Remember
>
> *Enable Multiple Roles Support* functionality only applies to Continuous Performance, not Continuous Feedback.

Do the Reports for Matrix Managers automatically display in the Active Channel List ?

No, matrix managers must initiate a channel with their matrix reports.

The multiple roles functionality allows for users outside the traditional manager/direct report hierarchy to create meeting channels. The feature was designed to offer you the flexibility to be inclusive of other roles in a leadership or managerial capacity to use a 1:1 meeting channel. The system doesn't pull in those other nontraditional hierarchical relationships by default, and isn't intended to.

Direct reports automatically display under a manager in the *Active Channels* list.

> ℹ Note
>
> A direct manager can view the activities on the goal plan created by the matrix manager and employee. The direct manager can't drill into those activities. To drill into an activity from the goal plan you must co-own the activity and are within channel.

Is it possible to hide the Channels shared between the manager and their direct reports?

No, the manager/direct report channels are static – it isn't possible to hide them.

Is it possible to delete Channels?

No, it isn't possible to delete Channels. When a channel is no longer required, it can be hidden. They are shown under the *Hidden Channels* tab in the *Active Channels* list.

What is the maximum number of Active Channels that a user can access?

A user can have up to 300 *Active Channels* and also have up to 300 *Hidden Channels*.

Related Information

Getting Started with the Latest Version of Continuous Performance Management [page 21]
Allowing an Enhanced Achievement Experience (Latest) [page 38]
Notifications with Continuous Performance Management [page 65]
Qualtrics Feedback for Continuous Performance Management [page 75]
Hiding Prior Feedback from a New Manager That Was Requested or Given By the Former Manager [page 78]
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Enabling Outlook Integration with Continuous Performance Management [page 73]
Removing CPM Feedback Data as an Administrator [page 76]
Changing the Default Language for Continuous Performance Management [page 84]
Capturing Meeting Notes for 1:1 via the Web Application (Latest Version) [page 86]
Adding, Editing, or Deleting a Performance Goal to the Goal Plan (Latest) [page 87]

5.9 Validating the Initial Configuration of the Latest Version of CPM

You run a diagnostic check that validates whether Continuous Performance Management has been configured and permissioned correctly in your instance.

Prerequisites

The initial configuration is completed:

- You have administrator permission.
- You've upgraded to the latest version of CPM.
- You've defined the *Activity View Status Labels*.
- You have set the *Feature Configuration*.
- You have defined and assigned role-based permissions for CPM.

Context

Before you use Continuous Performance Management for the first time, you ensure that certain platform capabilities are correctly set up.

Procedure

1. Log on as an administrator and go to the *Admin Center* > *Performance Management* > *Continuous Performance Management*.

   The *Continuous Performance Management Configuration* view is shown.
2. Under *General Configuration*, choose *Validate*.

   The *Validate Configurations* dialog box is shown with a validation summary.

Validation Category	Comment
Prerequisite Features	All the prerequisites for Continuous Performance Management have been met.

Validation Category	Comment
OData API	The Continuous Performance Management OData APIs are available. ℹ Note If your instance doesn't include a default goal plan template or a default development plan template, an OData API error is shown when you run the Validation checks. Ignore this error if you *aren't* using performance goals and/or development goals with Continuous Performance Management.
Metadata Framework Object Definition	The Metadata Framework entity definitions related to Continuous Performance Management are available in the database, and that the *RBP Secured* field of each entity has the correct value.
Role Based Permission Configuration	All the basic role-based permissions to enable user roles to use Continuous Performance Management have been granted. ℹ Note The validation tool doesn't check for the voluntary permissions, such as requesting feedback on achievements. It only checks for permissions that are essential for Continuous Performance Management to work on your instance.
Initial Configuration	The initial configuration has run without error.

3. To get a comprehensive report of the validation check, select *Download Validation Report* on the *Validate Configurations* dialog box. The report is a JSON file that can be used when troubleshooting a validation issue.

> ℹ Note
>
> The validation tool performs a system diagnostic check. If any of the validations fail, an error message is shown and asks you to refresh the configuration again.

4. When the configuration has successfully refreshed, close the dialog box by choosing *Close*.

> ℹ Note
>
> To see changes reflected in the system, log out and log on again.

Related Information

Getting Started with the Latest Version of Continuous Performance Management [page 21]
Allowing an Enhanced Achievement Experience (Latest) [page 38]
Notifications with Continuous Performance Management [page 65]
Qualtrics Feedback for Continuous Performance Management [page 75]

[Hiding Prior Feedback from a New Manager That Was Requested or Given By the Former Manager [page 78]]
[Understanding Meeting Channels Logic with CPM Multiple Roles Functionality [page 50]]
[Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]]

5.10 Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite

Configure your system to allow Continuous Performance Management to share functionality with other SAP SuccessFactors modules.

CPM and the Reimagined Home Page Experience

The latest home page experience is required with the latest version of CPM. The latest home page experience include the following for CPM.

> **Note**
>
> Actions taken on the Home Page can create to-do tasks. The *To-Do* panel is available from any page view by selecting the *To-Do Items icon*. For the *To-Do* panel to be visible for users, an administrator selects the checkbox for *Enable To-Do Panel* on *Company System and Logo Setting* from the *Admin Center*.

Feature		Comments
Quick Actions	Create Activity Give Feedback Request Feedback	Quick Actions allow users to create an activity, give feedback, or request feedback without navigating away from the home page. Administrators control which Quick Actions tiles are visible for the user by going to *Admin Center* > *Tools* > *Manage Home Page* and selecting the
Activity Cards	Shows recent activities on the home page of the user.	*Activity* cards show on the user's home page. More than one activity is stacked under the top activity. Choosing *View All* expands to show all activity cards. The *Activity* card shows updates to activities created by a user. Updates also include activities by the user's manager, for example, adding comments to the user's activities.

Feature	Comments
	ℹ Note The *Activity* card does not support multiple role functionality. An *Activity* card is shown only when a manager makes an update and not when another channel owner makes an update.

CPM Integration

Learn about integration of Continuous Performance Management across the SAP SuccessFactors HXM Suite. The following subtopics describe the configuration steps needed.

Related Information

Getting Started with the Latest Version of Continuous Performance Management [page 21]
Allowing an Enhanced Achievement Experience (Latest) [page 38]
Notifications with Continuous Performance Management [page 65]
Qualtrics Feedback for Continuous Performance Management [page 75]
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Adding CPM Integration to Goal Management [page 59]
Adding CPM Integration to Performance Management [page 61]
Adding CPM Integration to the Career Development Plan [page 62]
Adding CPM Integration to Compensation [page 63]

Adding CPM Integration to Calibration [page 64]

5.10.1 Adding CPM Integration to Goal Management

You can link Continuous Performance Management to your Goal Management Goal Plan view.

Prerequisites

With the *latest* version of Continuous Performance Management, you've enabled *Enable Goal Management Access Permission* on the *Goal Management Feature Settings* from the *Admin Center*.

> **i Note**
>
> The following prerequisites and procedure only apply if you're using the *legacy* version of Goal Management (GM v12).
>
> If you're using the latest version of Goal Management, with Total Goal Management and the Career Development Plan enabled, the integration is automatic with the latest version ofContinuous Performance Management.

- You're using the *legacy* Goal Management (GM v12) and have enabled the *latest* version of Continuous Performance Management.
- The product edition is either Enterprise or SPRAC.
- The role-based permissions to view achievements on the goal plan is enabled.

Context

The following table describes the differences in functionality when using the legacy versus the latest version of Goal Management with the latest version of Continuous Performance Management.

Functionality	Latest Version of Goal Management and Latest Version of CPM	Legacy version of Goal Management (GM v12) and Latest version of CPM
Create and view activities directly from with the goal plan	YES	NO
Continuous Feedback from the latest version visible on the goal plan	NO You're shown Activities in the goal plan. Feedback is linked to the Activity details.	YES
CPM Achievements visible on the goal plan	YES Only Activities tagged as Achievements.	YES Stand-alone Achievements + Activities tagged as Achievements.

Functionality	Latest Version of Goal Management and Latest Version of CPM	Legacy version of Goal Management (GM v12) and Latest version of CPM
Do CPM Achievements and feedback integrate into the Performance Form?	YES The Performance Form pulls in both old stand-alone Achievements and new Activities tagged as Achievements.	YES The Performance Form pulls in both old stand-alone Achievements and new Activities tagged as Achievements.

When using the *latest* version of Continuous Performance Management and the *latest* version of Goal Management:

- The integration into Goal Management is automatic.
- The integration includes activities and activities tagged as achievements.

> **i Note**
>
> For example, when a user in latest version of CPM adds an activity and links it to a goal, that activity is shown in the latest version of Goal Management. No switch is required on the goal plan to integrate.
>
> If a user, in the latest version of CPM, adds an activity and tags it as an achievement, it's shown in the goal plan.

> **→ Remember**
>
> When adding activities from Goal Management, the *Create Activity* button is only available to a direct manager and employee in Goal Plan view.

Multiple Roles in Continuous Performance Management

When using the **latest** version of Continuous Performance Management (CPM) **with Multiple Roles enabled**, and the **latest** version of Goal Management:

• ONLY the employee and their line manager are able to add CPM activities from the Goal Plan.

• When an employee has a CPM channel with someone other than their line manager, neither that employee, nor the person who isn't their line manager, is able to add activities to that channel from the Goal Plan.

The following steps are required only when using the *latest* version of Continuous Performance Management and the *legacy* version Goal Management (GM v12).

You can skip these steps if using the latest version of each.

Procedure

1. Sign on as an administrator and go to *Admin Center* > *Tools* > *Manage Templates*

   The the *Manage Templates* view is shown.
2. Select the *Goal Plan* tab, and select the goal plan template for including Continuous Performance Management Achievements.
3. Choose the *General Settings* tab and select *Display Continuous PM Achievements on your goal plan* checkbox.
4. Save your changes.

Results

The *CPM Achievements* column is available on the *Goal Plan* view. For more information on the goal plan template, refer to the *Goal Management* guide on the *SAP Help Portal*.

Related Information

Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]
Goals Management Overview
For Legacy Version of CPM: Configuring the Goal Plan Tab to Show Achievements [page 128]

5.10.2 Adding CPM Integration to Performance Management

Performance Management Achievements (or activities tagged as achievements) can be integrated into a performance form. If the performance form includes sections for performance and development goals, achievements linked to and shown on performance form goals.

Prerequisites

- SuccessFactors Performance Management v12 Acceleration
- Role-based permissions to access Performance Management.
- Role-based permissions granted on the Achievement entity for users.
- Product edition: Enterprise or SPRAC
- Goal Management and/or Career Development Plan is enabled.

Context

The following settings are required to allow achievements to be shown in the performance form.

Procedure

1. Go to *Admin Center* > *Tools* > *Manage Permission Roles* > *Select Role* > *Permission* > *Continuous Performance Management*, and under *Achievement*, select *View*.
2. Go to *Admin Center* > *Tools* > *Form Template Settings* and select the performance form template to integrate settings.

3. Select *Enable Achievements tab in Performance Goal Section* and *Enable Achievements tab in Performance Development Goal Section*.
4. Choose *Update Form Template*.

Results

The system displays the *Achievements* tab on your Performance Review form and Development Goals form. The *Achievements* tab is visible only to users who have the necessary role-based permissions to access your Performance Review form and Development Goals form, and to view your achievements.

> → Remember
>
> Achievements are only visible within the date range of the form. For example, a Development Goals form begins 1 July and ends in 31 July. If an achievement for the goal is from 1 August, then that achievement won't be included in the form.

Related Information

Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]
Managing the Performance Form After it is Launched

5.10.3 Adding CPM Integration to the Career Development Plan

You can link the achievements that you add through Continuous Performance Management to your development goals.

Prerequisites

- The product edition is either Enterprise or SPRAC
- Role-based permissions to access Continuous Performance Management
- Role-based permissions to access Career Development Planning

Context

Linking achievements to development goals enables achievements and the feedback received on the achievements, to be included with the development plan.

Note

This is an SAP SuccessFactors Business Beyond Bias feature. Use it to support processes that detect, prevent, or eliminate the influence of bias, helping you achieve your diversity and inclusion goals.

Procedure

1. Log on as an administrator and go to *Admin Center* > *Tools* > *Manage Templates*.

   The *Manage Templates* view is shown.
2. Select the *Development* tab, and select the development plan template to integrate with Continuous Performance Management achievements.
3. Choose *General Settings* and select *Display Continuous PM Achievements on Development goal plan*, then choose: *Save*.

Results

A *CPM Achievements* column shows in the development plan that you modified.

Related Information

Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]

5.10.4 Adding CPM Integration to Compensation

You can link achievements to a Compensation template.

Prerequisites

- The product edition must be either Enterprise or SPRAC.
- Permissions to access *Compensation*
- Role-based permission to access Continuous Performance Management

Context

The following steps enable viewing achievements in the compensation worksheets of the Compensation template. When achievements are linked to the Compensation, the *CPM Achievements* is shown on the dropdown list for the compensation worksheet. Planners, who make compensation decisions, can access employee achievements directly from the compensation worksheet.

Procedure

1. Log on as an administrator and go to *Admin Center* > *Compensation Home*.
2. Select a *Compensation Plan* template.
3. Go to *Plan Setup* > *Settings* > *Advanced Settings*, and select *Allow access to Continuous Performance Management Achievement view*.
4. Choose *Update Form Template*.

   You can now access the *CPM Achievements* tab from the compensation worksheet.
5. Go back to *Compensation*.
6. Select a *Compensation worksheet* based on the selected *Compensation Plan* template.
7. Under any *Employee* dropdown, you can select *Open Achievements* to be taken to the *CPM Achievements* tab.

Related Information

Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]

5.10.5 Adding CPM Integration to Calibration

You can link the achievements that are adding with Continuous Performance Management to your Calibration *Sessions* template.

Prerequisites

- The product edition must be either Enterprise or SPRAC
- Permission to access Calibration
- Role-based permission to access Continuous Performance Management

Context

Linking achievements to the *Sessions* tab enables managers to view the achievements of their direct reports in Calibration sessions.

> **i Note**
>
> You can enable only managers to view employee Continuous Performance Management achievements.

Procedure

1. Log on as an administrator and go to *Admin Center* > *Tools* > *Manage Calibration Templates*.

   The *Manage Calibration Templates* view is shown.
2. Select the Calibration template to include the Continuous Performance Management achievements.

   The selected template details view is shown.
3. Choose the *Data* tab, scroll down, and select *Others*.
4. Select *Allow access to Continuous Performance Management Achievements*,
5. Choose *Save*.

Results

Continuous Performance Management achievements are shown in a dropdown option for the Calibration session.

Related Information

Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]

5.11 Notifications with Continuous Performance Management

You can configure Continuous Performance Management to send certain notifications by default.

You receive alerts about your pending tasks in the *To Do* notifications on the web application header, and on your mobile application.

> **i Note**
>
> Ensure that the *To-Do* panel is available. An administrator goes to *Admin Center* > *Tools* > *Company System and Logo Settings* and selects the checkbox for *Enable the To-Do Panel*.

> Once enabled, the *To-Do* panel is available to users from any view. The panel expands by selecting the ✓ *To-Do icon* from the controls at the top of the interface.

By default, the system triggers email notifications when:

- You receive feedback
- You receive a feedback request
- Someone responds to your feedback request

By default, the system also triggers To Do notifications when:

- You receive a feedback request

> **i Note**
>
> The latest version no longer supports *CPM Notification Job*.

The remaining notifications are triggered when you perform the action linked to the notification. The following notifications aren't tied to the provisioning job, but instead run on actions taken:

- Activity Update Creation Notification
- Continuous Feedback Received Notification
- Continuous Feedback Responded Request Notification
- Continuous Feedback Request Notification
- Multiple Roles 1:1 Meeting Invitation
- Multiple Roles 1:1 Meeting Invitation Accepted

> **i Note**
>
> The latest version of CPM must be enabled and Multiple Roles permitted for those notifications.

Some notifications are enabled by default, and you can configure the rest using the Continuous Performance Management page.

Related Information

Getting Started with the Latest Version of Continuous Performance Management [page 21]
Enabling Continuous Performance Management from the Admin Center [page 24]
Updating to the Latest Version Using the Upgrade Center [page 26]
Adding Activity Status Labels to CPM (Latest) [page 27]
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5.11.1 Creating an Email on Receiving Feedback and Responses

You can choose to send email notifications to employees when they receive feedback, and when they receive responses to their feedback requests.

Prerequisites

- Enable Intelligent Services for your instance through the Upgrade Center.

  > **i Note**
  >
  > By default, email notification uses the Intelligent Services event framework to recognize the sending of feedback. Alternatively, if you want to send email notification for receiving feedback or responses to feedback requests, then enable Intelligent Services for your instance.

Context

By default, the Feedback tab lists ad-hoc feedback messages an employee receives from other employees. However, you can also send an email notification to the employee when the employee receives feedback or responses to a feedback request. To enable the email notification:

Procedure

1. Go to *Admin Center*, and in the *Tools Search* field, enter *Email Template Notification*. The *E-Mail Notification Templates* page appears.
2. Select *Continuous Feedback Received Notification*, and review the default e-mail template on the right half of the page. By default, the email notification contains the name of the feedback provider and a link to the message in the application. You can update the e-mail template, as desired.

3. Click *Save Notification Settings*.

Results

Employees receive notification emails whenever they receive feedback or responses to their feedback requests.

Related Information

Notifications with Continuous Performance Management [page 65]

5.11.2 Creating an Email Notification on Receiving a Feedback Request

You can choose to send email notifications to employees when they receive requests to provide feedback for other employees.

Prerequisites

- Enable Intelligent Services for your instance through the Upgrade Center.

> **i Note**
>
> By default, email notification uses the Intelligent Services event framework to recognize the sending of feedback. Alternatively, if you want to send email notification for receiving feedback requests, then enable Intelligent Services for your instance.

Context

When employees receive a feedback request, the system displays the request in a home page and under *Notifications* . However, you can also send an email notification to the employee when the employee receives a feedback request. The template names the feedback requester, the employee, the kind of feedback requested, and contains a link to the feedback request. You can update the email notification template to best suit the needs of your organization.

To enable the email notification:

Procedure

1. Log on as an administrator and go to *Admin Center* > *Tools* > *E-mail Notification Template Settings*.

   The *E-Mail Notification Templates* view appears.
2. Select *Continuous Feedback Request Notification*, and review the default email template on the right half of the page. You can customize the content of the email template as desired and *Save Changes*.
3. Choose *Save Notification Settings*.

Results

Employees receive email notification whenever they receive feedback requests.

Related Information

Notifications with Continuous Performance Management [page 65]

5.11.3 Creating an E-mail Notification on Receiving an Activity Update from a Manager

You can choose to send e-mail notifications to employees when their managers add updates to employee activities.

Context

By default, employees can view updates or comments made by their managers on Activities. However, you can also send an e-mail notification to the employee when the employee receives a manager update or comment. This helps employees receive manager guidance immediately. To send this e-mail notification, enable it on the e-mail templates configuration page, and configure it as an Intelligent Services event.

Procedure

1. Go to *Admin Center*, and in the *Tools Search* field, enter *Email Template Notification*. The system displays the *E-Mail Notification Templates* page.

2. Select *Activity Update Creation Notification*, and review the default e-mail template on the right half of the page. You can customize the content of the e-mail template as desired.
3. Click *Save Notification Settings*.
4. To activate the *Continuous Performance Activity* event that triggers the notification, go to *Admin Center* > *Intelligent Services Center*, and select *Continuous Performance Management Activity*.
5. On the *Flow* tab, under *Activities* on the right, select *Notify employee about activity update*.

   The system adds a new flow rule.

Results

Employees receive notification e-mails whenever their managers add updates to their activities.

Related Information

Notifications with Continuous Performance Management [page 65]

5.11.4 Creating an Email Notification on Receiving a Multiple Roles 1:1 Meeting Invitation

When using multiple roles functionality, you can choose to send email notifications to employees when other employees invite them to a 1:1 meeting channel.

Prerequisites

- The latest version of Continuous Performance Management is enabled.

  > ⚠ Caution
  >
  > The following feature require upgrading to the latest version (2H 2020) version of Continuous Performance Management. Upgrading to the latest Continuous Performance Management version **cannot** be undone. You **cannot** revert back to an older version of CPM. Please make sure that you have reviewed the feature differences before you upgrade.

- *Enable Meeting Notes* is enabled on *Features Configuration* section of the *Continuous Performance Management Configuration* in the *Admin Center*.

Context

By default, employees can accept channel invitations from other employees. However, you can also send an email notification to the employee when the employee receives a channel invitation. Sending an email helps employees accept channel invitations immediately. To send this email notification, enable it on the email templates configuration page, and then configure it as an *Intelligent Services* event.

Procedure

1. Log on to the system as an administrator.
2. Go to the *Admin Center* > *Tools* and enter **`Email Template Notification`**.

   The *E-Mail Notification Templates* view is shown.
3. Select *Multiple Roles 1:1 Meeting Invitation* and review the default email template on the right column. You can customize the content of the e-mail template, as desired.
4. Choose *Save Notification Settings*.
5. To activate the multiple role channel event that triggers the email notification, go to *Admin Center* > *Tools Search* and enter **`Intelligent Services Center`**.

   The *Intelligent Service Center* view is shown.
6. Select *Multiple Role Channel Event*.

   The *Multiple Role Channel Event* details view is shown.
7. Choose *Actions* and then *Save Flow*.

   The system adds a new flow rule.

Results

Employees send email notifications upon accepting a new meeting-space invitation.

Related Information

Notifications with Continuous Performance Management [page 65]
Notifications with Continuous Performance Management [page 65]

5.11.5 Creating an Email Notification on Accepting a Multiple Roles 1:1 Meeting Invitation

You can choose to send email notifications to employees when their 1:1 meeting channel, using multiple roles functionality, has been accepted.

Prerequisites

- The latest version of Continuous Performance Management is enabled.

  > ⚠ Caution
  >
  > The following feature requires upgrading to the latest version (2H 2020) version of Continuous Performance Management. Upgrading to the latest Continuous Performance Management version **cannot** be undone. You **cannot** revert back to an older version of CPM. Please make sure that you have reviewed the feature differences before you upgrade.

- *Enable Meeting Notes* is enabled on *Features Configuration* section of the *Continuous Performance Management Configuration* in the *Admin Center*.

Context

By default, employees can view when another employee has accepted their channel invitation. However, you can also send an email notification to the inviting employee when the invitation has been accepted. Sending an email helps employees use new channels immediately. To send this email notification, enable it on the email templates configuration page, and configure it as an *Intelligent Services* event.

Procedure

1. Log on to the system as an administrator.
2. Go to the *Admin Center* > *Tools Search*, enter **`Email Template Notification`**, and then select.

   The *E-Mail Notification Templates* view is shown.
3. Select *Multiple Roles 1:1 Meeting Invitation Accepted* and review the default e-mail template on the right column. You can customize the content of the e-mail template, as desired.
4. Choose *Save Notification Settings*.
5. To activate the multiple role channel event that triggers the email notification, go to *Admin Center* > *Tools* and enter **`Intelligent Services Center`**.

   The *Intelligent Service Center* view is shown.
6. Select *Multiple Role Channel Event*.

   The *Multiple Role Channel Event* details view is shown.

7. Choose *Actions* and then *Save Flow*.

   The system adds a new flow rule.

Results

Employees send email notification upon accepting a new meeting-space invitation.

Related Information

Notifications with Continuous Performance Management [page 65]
Notifications with Continuous Performance Management [page 65]

5.12 Enabling Outlook Integration with Continuous Performance Management

The latest version of Continuous Performance Management allows users to give feedback from a Microsoft Outlook add-in.

Prerequisites

- The latest version of Continuous Performance Management (CPM) is enabled.
- Mapping SAP SuccessFactors user attributes to Microsoft Active Directory is set up.

Context

The administrator can create the ability for users to add Continuous Performance Management (CPM) feedback directly through Outlook. If you enable this feature, a file is generated for the administrator to set up the Microsoft Exchange server. The add-in is created and shown on the toolbar in Outlook for users.

> ⚠ Caution
>
> Single sign-on isn't supported with this integration.

Procedure

1. Log on as an administrator and go to *Admin Center* > *Continuous Performance Management*.

   The *Continuous Performance Management Configuration* view is shown.
2. On the *Feature Configuration* section, select *Enable Continuous Feedback* to activate the checkbox for *Enable Continuous Feedback Outlook Integration (Step 1 of 2)* and select.
3. Choose *Save Configuration*.

   > **i Note**
   >
   > The configuration must be saved to activate the download file. Once the configuration is saved , the file is available for download and also available whenever the administrator comes back to this view.
4. Choose the *Download Outlook file (Step 2 of 2)* and a file is downloaded.

   > **i Note**
   >
   > If there's an issue with the downloaded file, an error message is shown. Discard the file with the error and try downloading again.
5. Open the downloaded file, customized with your specific domain URL, or other modifications, and save your changes.

   > **i Note**
   >
   > The downloaded XML file includes notes and instructions.
6. Use the file with the Microsoft Exchange server to add and configure this option and then push change to all users.

   > **i Note**
   >
   > User target population must have feedback permission.
7. When configuration is completed, enable the change in Outlook for employees.

   > **i Note**
   >
   > Single sign-on integrations aren't supported. Authentication by users with their SAP SuccessFactors username and password are required every 7 days.

Results

An Outlook add-in is shown in the Outlook toolbar. With successful SAP SuccessFactors authentication, a user can provide feedback.

Related Information

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Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]

5.13 Qualtrics Feedback for Continuous Performance Management

By integrating your SAP SuccessFactors system with Qualtrics, you can create opportunities for employees to provide feedback at specific intervals after they've met with their managers.

To add Qualtrics feedback opportunities, enable and integrate Qualtrics with your SAP SuccessFactors system. Refer to *Integrating SAP SuccessFactors with Qualtrics* for details.

SAP SuccessFactors allows you to display feedback opportunities in various places by creating an integration between Qualtrics intercepts and SAP SuccessFactors. For Continuous Performance Management, you can ask questions such as "How satisfied are you with your most recent performance review?"

Related Information

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In-App Survey Integrations for Continuous Performance Management

5.14 Removing CPM Feedback Data as an Administrator

An administrator can permanently delete Continuous Performance Management feedback given to users.

Prerequisites

- The latest version of Continuous Performance Management (CPM) is enabled.
- The administrator role has the *Admin Access to Delete Continuous Performance Management Page* permission granted.

  > ℹ Note
  >
  > SAP recommends that a special permission role is created for the administrator that is allowed to delete feedback. The deletion of the feedback by this administrator is permanent.

Context

Situations occur with Continuous Feedback where the feedback can't be deleted.

- A manager requests feedback about a direct report from another person. The feedback is technically owned by the giver and so the manager can't delete the feedback.
- When an employee receives feedback, they can't delete it because it was requested on behalf of the manager.

The system allows for an administrator role to have the administrative function to permanently delete the feedback on request.

> ⚠ Caution
>
> This feature is designed for deleting individual feedback and isn't intended for purging large quantities of feedback. Deletion of feedback items is immediate and permanent, there's no support available to recover mistakenly deleted items.

> ℹ Note
>
> You cannot delete the Feedback Request. The request cannot be deleted or withdrawn by an administrator.

The administrator granted permission to delete feedback:

- Cannot search by *Manager Requested Feedback* or by a manager name. The special administrator only searches by giver or receiver name, feedback topic title, or given after or given before dates.

Cannot view the *content* of the feedback. The administrator only sees the date, giver and receiver names, and the feedback topic title.

- **i Note**

  200 items is the maximum number of results returned for a search. 200 is also the maximum number of items you can delete at one time.

- Though this functionality is only available when the latest version of CPM is enabled, the administrator is able to delete *any* feedback in the system.
- Deletion of feedback by the administrator is permanent and cannot be restored.
- In Reporting, the *Feedback status* is shown as deleted and *Last updated by* shows the name of the administrator.

Procedure

1. Sign in as an administrator and go to *Admin Center* > *Tools* > *Delete Continuous Feedback*.

   A *Delete Continuous Feedback* view is shown.
2. Enter at least one search criteria for the following fields to begin:
   - *Receiver Name*
   - *Giver Name*
   - *Topic*
   - *Given After* (date)
   - *Given Before* (date)

   Results are shown in the *Feedback* table.
3. Select the checkbox for the rows of feedback to delete.
4. Choose *Delete Selected Feedback*.

Results

Selected feedback is permanently deleted. Once deleted, no revert is possible.

Related Information

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5.15 Hiding Prior Feedback from a New Manager That Was Requested or Given By the Former Manager

An employee has options to hide, delete, or show feedback from their previous manager to their new manager.

Prerequisites

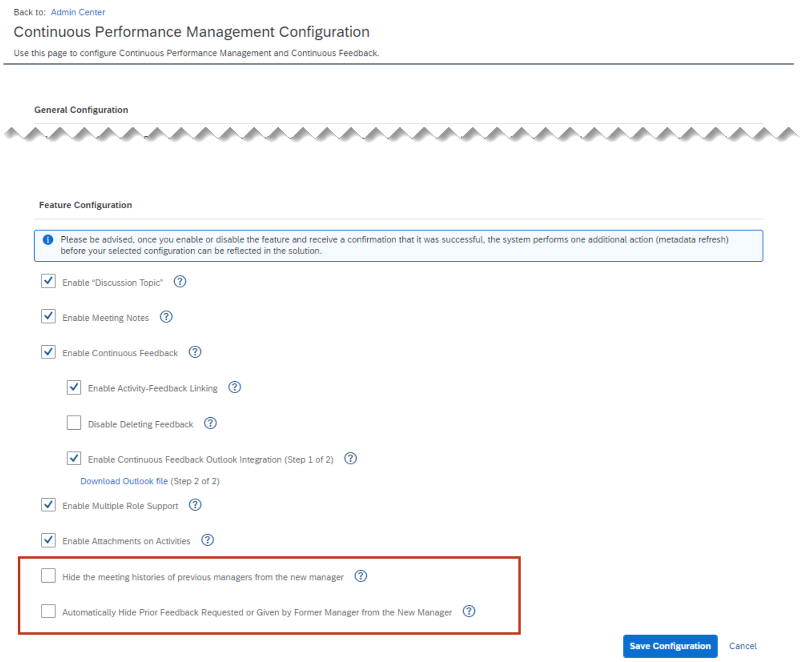
- The latest version of Continuous Performance Management (CPM) is enabled and configured.
- You've selected *Enable Continuous Feedback* on *Continuous Performance Management Configuration* from the *Admin Center*.

Overview

Continuous Performance Management (CPM) has the flexibility to provide options when an employee has a new manager. Some companies believe that a new manager shouldn't be entitled to see feedback from a former manager or requested on behalf of the former manager without the employee's authorization. CPM provides employees with to option to manually hide or delete their former manager's feedback. Administrators have the option to configure CPM settings to automatically hide the feedback given or requested by a prior manager from the new manager. Feature settings are provided for CPM to hide the meeting history between an employee and their prior manager from their current manager.

Options available on the *Continuous Performance Management Configuration* from the *Admin Center*.

1. *Hide the meeting histories of previous managers from the new manager.*
   Selecting this option enables the meeting histories between a direct report and their previous managers to be hidden from the new manager. The new manager is shown their own meeting histories with their current direct reports. Direct reports are shown all meeting histories with their current and previous managers.
2. *Automatically Hide Prior Feedback Requested or Given by Former Manager from the New Manager* .
   Selecting this option allows feedback given or requested by the previous manager for an employee to be automatically hidden from the new manager.



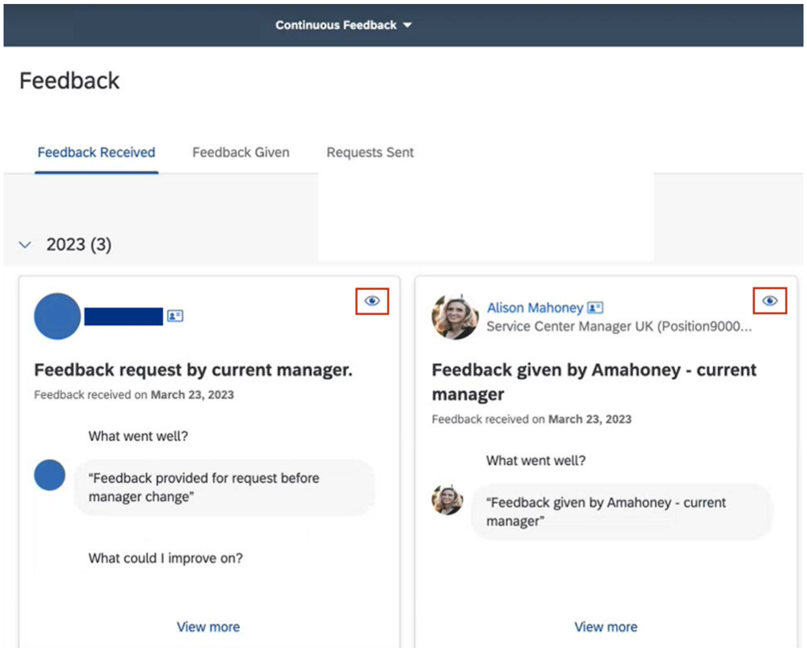
i Note

Currently, only Employee Central (EC)-enabled instances are supported for automatically hiding prior manager feedback.

Accessing Continuous Feedback Details

The following provides that basic steps for an employee accessing *Continuous Feedback Details*.

1. Sign on and go to *Continuous Feedback*.
2. Choose an *Active Channel*.
3. Select the *Feedback Received* tab and feedback cards with the 👁 *Visible to manager* show which feedback is visible to the manager.



4. Choose the *View More* on the feedback card to show the *Feedback Details*.
5. Available actions to the user depend on the configuration settings.

Default Settings (Automatically Hide Prior Feedback Requested or Given by Former Manager from the New Manager Button Not Selected)

There are two types of feedback associated with a manager.

1. Feedback from the manager.
2. Feedback requested by the manager.

When a manager changes and the *Automatically Hide Prior Feedback Requested or Given by Former Manager from the New Manager* feature has *not* been enabled, the employee can go in and manually hide or delete the previous manager's feedback. The employee can't hide or delete feedback provided on behalf of the manager.

1. The employee has followed the previous steps in the *Continuous Performance Details* section and selected a feedback card from their former manager.
2. Choose *View More* to show the *Feedback Details* view.
3. On the details view, the employee can manually set the *Make visible to my manager* switch to *No*.
   Or the employee can choose the *Delete Feedback* button to permanently delete the feedback.

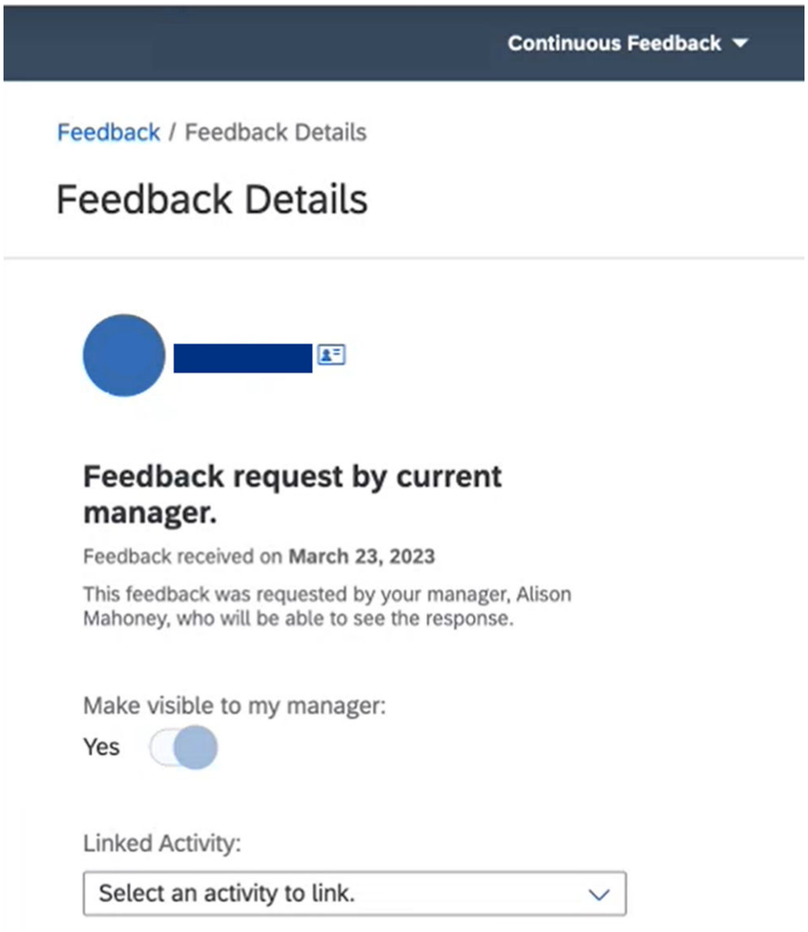
> **i Note**
>
> There's no reverting of the delete feedback action. Even if the previous manager becomes that employee's new manager in the future, any deleted feedback is permanent.

.

Feedback Actions by Default

Type of Feedback	Hide from New Manager	Delete Feedback
Feedback from Previous Manager	Yes (as manual option)	Yes (as manual option)
Feedback provided by another employee on behalf of the manager	No	No

When an employee can't hide or delete feedback, the delete option isn't shown and *Make visible to my manager* button is locked on *Yes*.



Automatically Hiding Feedback from New Manager (Feature Configuration Enabled)

When the CPM features configuration is set to *Automatically Hide Prior Feedback Requested or Given by Former Manager from the New Manager* , all of the feedback from the previous manager or provided on the behalf of the previous manager is hidden from the new manager. The employee has the option to manually change the feedback setting to be visible to the new manager. The employee retains the option to delete feedback. With this feature engaged, the employee can also hide or delete feedback given on the behalf of the manager as well.

> **Note**
>
> Only manager transfers made after the feature is enabled are changed. No retroactive changes are possible.

1. The employee has followed the previous steps in the *Continuous Performance Details* section and selected *View More*.
2. On the details view, the *Make visible to my manager* switch is automatically set to *No*.
   The employee has the option to manually switch the *Make visible to my manager* to *Yes*.
   The employee can choose the *Delete Feedback* button to permanently delete the feedback.

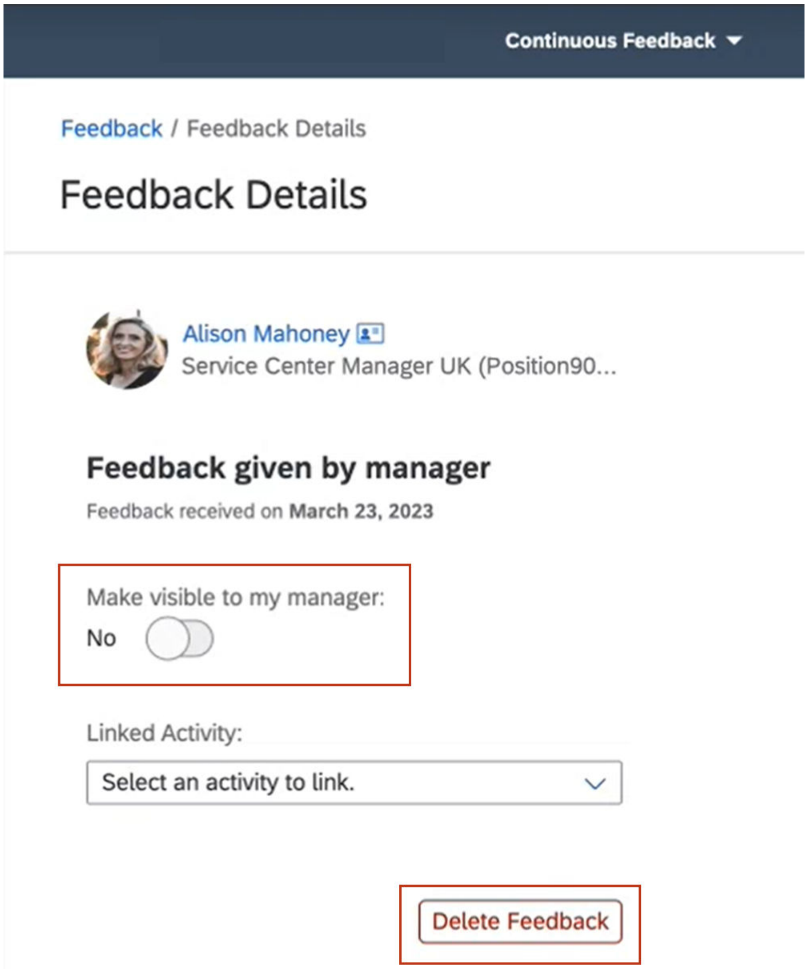
   > **Caution**
   >
   > Enabling *Automatically Hide Prior Feedback Requested or Given by Former Manager from the New Manager* isn't retroactive. The feature is only applied to manager transfers that occur after the feature is enabled.
   >
   > Currently, this feature only supports Employee Central (EC)-enabled instances.

   .

Feedback Actions with Automatically Hide Prior Feedback Requested or Given by Former Manager from the New Manager Enabled

Type of Feedback	Hide from New Manager	Delete Feedback
Feedback from Previous Manager	Automatically Hidden (with manual option to make visible)	Yes (as manual option)
Feedback provided by another employee on behalf of the manager	Automatically Hidden (with manual option to make visible)	Yes (as manual option)

The following image shows that feedback details after a manager transfer has occurred and when automatically set to hide.



Other Important Notes About Hiding and Deleting Feedback

Other conditions or additional manager changes have the following effects:

- If the former manager becomes the new manager, the feedback given by the former manager and requested by them on employee's behalf becomes automatically visible to that manager. The employee may not hide that feedback.
- If a former manager becomes the new manager, the feedback given by the former manager and requested by them on employee's behalf can't be deleted (unless it was previously deleted before the transfer.)
- If a change of management occurs and the previous manager becomes the new manager, any previous feedback about the employee is switched to being visible.
- Any feedback deleted by an employee is permanent and even if the previous manager becomes the next manager, the deleted feedback can't be undone.
- If a current manager requests feedback on behalf of an employee and the response isn't given until after the *Automatically Hide Prior Feedback Requested or Given by Former Manager from the New Manager* has been enabled, that feedback will be visible to the new manager.
- Any feedback that is automatically hidden during a manager transfer, stays hidden when the manager changes. Setting respect the employee's actions.

- If the *Automatically Hide Prior Feedback Requested or Given by Former Manager from the New Manager* feature was enabled and a decision is made to disable the feature. any existing employee actions hiding or deleting feedback are respected.
- The former manager continues to see their feedback given to old employee as well as the feedback requests on the employee's behalf.
- The feedback provided by the responder based on a request from a previous' manager continues to see the feedback given.

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5.16 Changing the Default Language for Continuous Performance Management

You can overwrite the default user interface text with US English or any language that is supported in the product.

Context

Manage Languages allows you to change the default values of the user interface text for any language enabled for your instance. You could change the default language of the user interface in cases such as these:

- You want to change the default values of the user interface text, such as system text, to better reflect your particular business practices and culture.
- There's an issue with system text, such as a problem with grammar, syntax, or key terms.

> **Note**
>
> *Manage Languages* allows you to change the language quickly, while waiting for a patch or release to fix a problem with system text. However, also report system text issues to Product Support so that we can address the issue in future builds.

> **! Restriction**
>
> No mobile support. The system applies the user interface labels that you modify using *Manage Languages* only to the web application. The modifications aren't supported on the mobile application for iPhone or Android phone.

Procedure

1. Log on as an administrator and go to *Admin Center* > *Tools* > > *Manage Languages*.

   The *Manage Languages* view is shown.
2. From the list, select the *Active* checkbox for each language you want to enable for your instance.
3. To download the default labels for a language, choose the three vertical dots icon in the *Action* column for the language desired, and choose *Download default labels*.
4. Choose *Save*.

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Manage Languages
Managing UI Labels in HXM Suite

5.17 Capturing Meeting Notes for 1:1 via the Web Application (Latest Version)

If Meeting Notes are enabled in the latest version of Continuous Performance Management, users can add notes.

Prerequisites

- The latest version for Continuous Performance Management is enabled.
- *Enable Meeting Notes* is enabled on *Features Configuration* section of the *Continuous Performance Management Configuration* in the *Admin Center*.

Context

By adding meeting notes during 1:1 meetings, you have a central place for your discussions.

> **Note**
>
> The following character limits apply to meeting notes:
>
> - As meeting notes supports HTML, the character limit is 2000, including HTML characters.

Procedure

1. Log on to the application.
2. Go to *Continuous Performance*.
3. Select a person from the *Active Channels* column.
4. Choose the *Start Meeting* button.

   A *Meeting with <selected person> on <today's date>* is shown.
5. Create a discussion topic name in the *Discussion Topics* area and choose *Add*.

   The new discussion topic is shown at the top of the list (when there are previous discussion topics).
6. Enter your notes under *Meeting Notes*.
7. Choose *Save and Finish* to close the meeting and save the notes.

Related Information

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5.18 Adding, Editing, or Deleting a Performance Goal to the Goal Plan (Latest)

The *Create Goal* dialogue in Continuous Performance Management supports accessibility requirements and provides consistency with goal creation guidelines in *Total Goal Management*.

Prerequisites

Configuration

- The latest version of Continuous Performance Management is enabled and users have access to *My Activities* view.
- The employees have an active Goal Plan.

Permissions

- The user has the *User* > *Continuous Performance User Permission* > *Access to Continuous Performance Management* permission.
- The user has the *User* > *Goals* permission with *Access to Continuous Performance Management Data* and *Goal Plan Permissions* for their Goal Plan selected.
- The user has the *User* > *Continuous Performance Management* > *Activity* permission. The user has permission to *View* the *Visibility* item and to *Edit* the *Actions* item.

Context

Employees have more control over their *Performance Goals* by creating, editing, or deleting directly in Continuous Performance Management (CPM). This feature takes advantage of improvements to Goal Management by allowing changes to *Performance Goals* by the CPM user reflected in the user's Goal Plan.

> → Remember
>
> When adding activities from Goal Management, the *Create Activity* button is only available to a direct manager and employee in Goal Plan view.

Procedure

1. The employee logs on and goes to *Continuous Performance*.

   The *Continuous Performance* view is shown.
2. Choose *View by Goal* and then choose the *Performance Goals* tab.

   The *Performance Goals* details view is shown.
3. To add a new goal, either:

Choice	Comments
From *Create Activity*	Choose *Create Activity* and on the dialog box that is shown, choose *Create Goal*.
From *View by Goal*	Choose the *+ Create Goal* tile

   A *Create Performance Goal* dialog box is shown.

4. Enter the following:

Field	Entry
Performance Objective	<Enter a meaningful goal name> **i Note** Performance Objective name has a maximum of 500 characters.
Description	[Optional] <Enter a description for the goal> **i Note** The description field has a maximum of 1000 characters.
Measure	<Measure name> **i Note** The Measure name has a maximum of 1000 characters.
Due Date	Select the calendar date for when the objective is due. **i Note** • The due date can't be earlier than the start date. • The start date can't be later than the due date.
Status	[Optional] Select an available status from the dropdown list.

5. Choose *Save*.

   The dialog box closes, the new goal is shown in the view, and the goal has been added to the employee's *Goal Plan*.

6. To edit or delete an existing goal, stay on the *Continuous Performance* > *Active Channels* > *My Activities with...* > *View by Goal* > *Performance Goals* view.
7. On an existing goal, choose *... (More)* on that tile and then from the dropdown, choose either *Edit Goal* or *Delete Goal*.
8. If you select *Delete Goal*, a confirmation dialog box is shown and then choose *Delete*.
9. If you select *Edit Goal*, the *Edit Performance Goal* dialog box is shown that includes the same fields described in Step 4. You make your changes and then choose *Save*.

   The goal is updated in the *My Activities* view and on the employee's Goal Plan.

Related Information

Getting Started with the Latest Version of Continuous Performance Management [page 21]
Allowing an Enhanced Achievement Experience (Latest) [page 38]
Notifications with Continuous Performance Management [page 65]
Qualtrics Feedback for Continuous Performance Management [page 75]
Hiding Prior Feedback from a New Manager That Was Requested or Given By the Former Manager [page 78]
Understanding Meeting Channels Logic with CPM Multiple Roles Functionality [page 50]
Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite [page 57]

6 Differences Using Legacy Version of Continuous Performance Management

An overview of the legacy version of Continuous Performance Management.

Context

If you're currently using the legacy version, you may continue to do so. The latest version of Continuous Performance Management (CPM) is available as an opt-in. Existing implementations can continue using the legacy version, though only the latest version is available for upgrades or new implementations.

The latest version of Continuous Performance Management (CPM) has differences from the legacy version. Some CPM features and functions are shared both by the legacy and the latest version. The following list isn't an exhaustive list of all legacy version features.

> ⚠ Caution
>
> If you are on the legacy version of CPM and *disable* CPM via the *Performance Management Feature Settings* or Provisioning and then *re-enable* CPM, the enabled version is the **latest version**, not the legacy version.
>
> Once upgrading to the latest CPM version, it **cannot** be undone. You **cannot** revert back to an older version of CPM. Please make sure that you've reviewed the feature differences before you upgrade.

Legacy Version-Specific Features

Legacy Feature	Description	Changes in Latest Version
Coaching	Managers can provide coaching advice through 2 pre-defined fields (**What You're Doing well** and **What you can Improve on**).	When upgrading to the *latest* version of CPM, any past coaching provided by a manger to an employee will be visible in a meeting capture, accessible from *Meeting History* within the *Meeting View*. If you would like to provide managers the ability to give coaching, the latest version of *Continuous Feedback* is a suitable replacement. The *latest* version of *Continuous Feedback* provides a way for those providing feedback to customize questions and provide more contextualized content for the recipient.

Legacy Feature	Description	Changes in Latest Version
Email Notifications	The CPM Notification Job manages the triggering of the following reminder notifications: **Note** Other email notifications are available. These notifications are specific to legacy. • Reminder Notification Update Status • Activity Reminder Notification • Achievement Reminder Notification • Conduct 1:1 Meeting Reminder Notification	The *latest* version of CPM doesn't support the CPM Notification Job, though includes email notifications. With the inclusion of multiple roles, email notifications for request or notifications for meeting from anyone the user can create a channel.
Reporting	CPM-specific reports in the Report Center using Table reports or Analytic Tiles and Dashboards. **Note** These reports are now part of SAP SuccessFactors People Analytics, which was introduced to consolidate all of SAP SuccessFactors reporting tools. *Table* reports were previously called ad-hoc reporting. *Analytic Tiles* and *Dashboards* include the functionality previously provided by YouCalc. *Story* reporting is new in SAP SuccessFactors People Analytics and can be used with the legacy version to report data.	The latest version of CPM also allows for SAP SuccessFactors People Analytics reporting in the Report Center. For the *latest* version of continuous feedback, only *Story* reports are supported.
Activities	Activities represent the things employees are working on. You can add Activities and a manager can view Activities of direct reports.	In the *latest* version of CPM, Activities can be shared with multiple roles, including managers and reports.
Add performance goals	Users can't add performance goals.	In the *latest* version, users can add performance goals.
Linking activities to goal plans	Users can link an activity to a performance or development goal from the default goal plan.	
Meetings	You can create 1:1 meetings between managers and direct reports, as well as capture meeting notes.	In the *latest* version, a user can create meetings with anyone with whom they've created a communication channel (multiple roles).

Legacy Feature	Description	Changes in Latest Version
Discussion Topics	Create shared topics to help structure the ongoing conversation.	In the *latest* version, discussion topics are created for a shared meeting agenda or action items.
Achievements	Achievements are grouped by *Time* and by *Goals*.	In the *latest* version of CPM, *Achievements* are in a single list, with a filter for *Date*.
Feedback	Users can request or respond to feedback. They can view feedback requests.	In the *latest* version of CPM, Continuous feedback offers users a more guided, question-based approach to receive or request feedback. When requesting or giving feedback, users provide a topic and ask questions. Questions are provided out-of-the box and can be configured by the administrator. The *latest* version also allows users to write their own questions. The new experience makes it easier for users to feel comfortable responding with constructive feedback for a specific topic.
Integration with other modules	CPM can be integrated with: • Goal Management goal plan • Performance Forms • Development Plan • Compensation • Calibration	
Access Continuous Performance Management via mobile apps	Users can access Continuous Performance Management through mobile apps.	User can access Continuous Performance Management (CPM) through mobile apps. i Note The latest version of CPM currently doesn't support this legacy mobile function: • Show Coaching in Meeting History

7 Configure Continuous Performance Management (Legacy)

An administrator selects Configure Continuous Performance Management through the Admin Center to make general and feature configuration settings.

Prerequisites

- You have administrator permissions.
- Continuous Performance Management is enabled.

> ⚠ Caution
>
> If you are currently using the legacy version, you may continue to do so. The latest version of Continuous Performance Management (CPM) is available as an opt-in. Existing implementations can continue using the legacy version, though only the latest version is available for upgrades or new implementations.
>
> If you are on the legacy version of CPM and *disable* CPM via the *Performance Management Feature Settings* or Provisioning and then *re-enable* CPM, the enabled version is the **latest version**, not the legacy version.
>
> Once upgrading to the latest CPM version, it **cannot** be undone. You **cannot** revert back to an older version of CPM. Please make sure that you've reviewed the feature differences before you upgrade.

The *Continuous Performance Management Configuration* view within *Admin Center*, provides administrators the following abilities:

- To customize the activity status values.
- To enable the direct linking of achievements to the default performance goals and the default development plan.
- To manage the visibility of *Other Topics* and *Coaching* under the *Activities* tab.
- To manage the availability of the *Feedback* tabs.
- To enable feedback requests from *Activities* and *Achievements* tabs.
- To perform a validation check.

> i Note
>
> You can't use *Configure Object Definitions* and *Manage Data* in *Admin Center* for configuring Continuous Performance Management.

Related Information

Enabling Features for Continuous Performance Management (Legacy) [page 94]
General Configuration (Legacy) [page 95]
Coaching (Legacy) [page 98]
Activities (Legacy) [page 100]

[Feedback (Legacy) [page 117]]
[Achievements (Legacy) [page 124]]
[Using Legacy Continuous Performance Management on Mobile Apps [page 135]]
[Creating Email Notifications (Legacy) [page 96]]
[Adding Reporting Permissions for Continuous Performance Management (Legacy) [page 97]]

7.1 Enabling Features for Continuous Performance Management (Legacy)

You can choose to enable or disable certain features in Continuous Performance Management.

When selecting the following features for the legacy version, go to the *Admin Center* > *Continuous Performance Management* and then to the *Feature Configuration* section

On the *Feature Configuration* section, enable or disable a feature by either selecting or clearing the checkbox next to it, and then choosing *Save Configuration*.

- *Enable "Discussion Topics"*: Manages the availability of the *Discussion Topics* section under the *Activities* view. Discussion topics allow employees and managers to track the topics they want to discuss together in their upcoming 1:1 meetings.

> **Note**
>
> The *Discussion Topics* feature is available for Continuous Performance Management role-based permissions only when you've selected *Enable Discussion Topics*.

- *Enable Continuous Feedback*: Allows employees to give feedback to and request feedback from colleagues.

> **Note**
>
> *Continuous Feedback* is available for Continuous Performance Management role-based permissions only if you select the *Enable Continuous Feedback* option.

- *Enable "Coaching"*: Manages the availability of the *Coaching* section under the *Activities* view. *Coaching* allows managers to provide guidance to their direct reports on what they're doing well and what they can improve.
- *Enable Achievement Goal Linking*: Allows employees and managers to align achievements to performance goals. This feature enables direct linking of achievements to the default performance goals.
- *Enable Achievement Development Goal Linking*: Allows employees and managers to align achievements to development goals. This feature enables direct linking of achievements to the default development goals.
- *Disable Deleting Feedback*: Prevents users from deleting feedback they've received.
- *Enable Activity Feedback*: Enables you to request feedback, directly on your activities. This option also enables you to link the feedback comments you receive, to any of your activities.
- *Enable Achievement Feedback*: Enables you to request feedback, directly on your achievements. This option also enables you to link the feedback comments you receive, to any of your achievements.

Related Information

Configure Continuous Performance Management (Legacy) [page 93]
Creating Email Notifications (Legacy) [page 96]
Adding Reporting Permissions for Continuous Performance Management (Legacy) [page 97]

7.2 General Configuration (Legacy)

The General Configuration section enables you to run a diagnostic check that validates whether *Continuous Performance Management* has been configured and permissioned correctly in your instance.

To run the validation check, go to the *Admin Center* > *Performance Management* > *Continuous Performance Management* > *General Configuration* section, and choose *Validate*. The *Validate Configurations* dialog box is shown with a validation summary that confirms whether:

- All the prerequisites for *Continuous Performance Management* have been met.
- The *Continuous Performance Management* OData APIs are available.

  > **i Note**
  >
  > If your instance doesn't include a default goal plan template or a default development plan template, you might see an OData API error when you run the Validation checks. Ignore this error if you aren't using performance goals and/or development goals with *Continuous Performance Management*.

- The Metadata Framework entity definitions related to *Continuous Performance Management* are available in the database, and that the *RBPSecured* field of each entity has the correct value.
- All the basic role-based permissions to enable user roles to use *Continuous Performance Management* have been granted.

  > **i Note**
  >
  > The validation tool wouldn't check for the voluntary permissions, such as requesting feedback on achievements. It only checks for permissions that are essential for *Continuous Performance Management* to work on your instance.

- The initial configuration has been done, and the preimport *Continuous Performance Management* entities, such as activities, achievements, and topics are available.

To get a comprehensive report of the validation check, click *Download Validation Report* on the *Validate Configurations* pop-up window. The report is a JSON file that can be leveraged by the personnel troubleshooting the validation issue.

> **i Note**
>
> The validation tool performs a system diagnostic check. If any of the validations fail, an error message describing the failure and a proposed solution for the issue appear below that validation. You can either resolve configuration errors on your own, or contact Product Support with the issue specifics for resolution.

Related Information

[Configure Continuous Performance Management (Legacy) [page 93]](#)
[Creating Email Notifications (Legacy) [page 96]](#)
[Adding Reporting Permissions for Continuous Performance Management (Legacy) [page 97]](#)

7.3 Creating Email Notifications (Legacy)

You can adjust Continuous Performance Management email notification templates to fit your requirements.

Context

Continuous Performance Management (CPM) provides a number of email notifications for different requests or reminders. Modify the default subject and body text for your requirements.

By default, the system triggers these email notifications when:

- A user requests feedback.
- An activity update is created.
- A 1:1 meeting invitation is sent and another when the invitation is accepted.

> **i Note**
>
> The following legacy notifications are no longer supported:
>
> - Manager ToDo for 1:1 Meeting
> - Employee To-Dos for 1:1 Meeting
> - Activity Reminder
> - Achievement Reminder
>
> 1H 2020 is the last release in which maintenance activities, such as code fixes, are applied. The legacy notifications were retired in 1H 2021.

Procedure

1. Log on as an administrator and go to *Admin Center* > *Tools* > *Email Template Notification*.

   The *Email Notification Templates* page appears.
2. Select a Continuous Performance Management *Email Notification Template* from the left column.

   The details view of the selected template is shown in the right column.
3. Review the default email template setting and text on the right half of the page. Update the email template as desired.

4. After updating the template, choose *Save Changes*.
5. Choose *Save Notification Settings* at the bottom of the left column.

Results

Email notifications have your required subject title and text.

Related Information

Configure Continuous Performance Management (Legacy) [page 93]
Enabling Features for Continuous Performance Management (Legacy) [page 94]
General Configuration (Legacy) [page 95]
Coaching (Legacy) [page 98]
Activities (Legacy) [page 100]
Feedback (Legacy) [page 117]
Achievements (Legacy) [page 124]
Using Legacy Continuous Performance Management on Mobile Apps [page 135]
Retirement of Specific Continuous Performance Management Notifications

7.4 Adding Reporting Permissions for Continuous Performance Management (Legacy)

To create Continuous Performance Management Reports in the Report Center, permissions are added.

Context

> **Note**
>
> These steps only apply to the legacy version of Continuous Performance Management.

Procedure

1. Log in as an administrator and go to *Admin Center* > *Tools* > *Manage Permission Roles*.
2. On the *Permission Role List* page, select the permission role.

The system displays the *Permission Role Detail* page.

3. Under *Permission settings*, choose *Permission...* .
4. In the *Permission settings* dialog box, under *User Permissions*, select *Reports Permission*.
5. Select *Report Center*, so that users have access to the consolidated list for reports.
6. Go to *Create Reports* and ensure that *Continuous Performance Management* and *Continuous Performance Meetings* are selected.
7. Go to *Run Reports* and ensure that *Continuous Performance Management* and *Continuous Performance Meetings* are selected.
8. Go to *Analytic Tiles and Dashboards* and select.
9. Choose *Done*.
10. Repeat these steps to grant this permission to additional roles you've created for Continuous Performance Management.
11. Select *Save Changes*.

> **i Note**
>
> The legacy version does NOT support *Story* reporting.

Results

CPM-specific reports can be created in the Report Center.

Related Information

Configure Continuous Performance Management (Legacy) [page 93]
Enabling Features for Continuous Performance Management (Legacy) [page 94]
General Configuration (Legacy) [page 95]
Coaching (Legacy) [page 98]
Activities (Legacy) [page 100]
Feedback (Legacy) [page 117]
Achievements (Legacy) [page 124]
Using Legacy Continuous Performance Management on Mobile Apps [page 135]

7.5 Coaching (Legacy)

Timely guidance and feedback from managers can greatly improve the performance of employees. Coaching features in the legacy version of Continuous Performance Management offer a simple framework for managers to provide constructive advice to their direct reports.

Concept

The *Coaching* feature is ONLY in legacy version of Continuous Performance Management.

> → Remember
>
> The content with the *Coaching* section appears in the *Activities* view only after a manager provides an employee coaching advice.

When you upgrade to the latest version of Continuous Performance Management, the coaching feature is no longer available from the *Meeting View*.

> ℹ Note
>
> When upgrading to the latest version of Continuous Performance Management, any past coaching provided by a manger to an employee will be visible in a meeting capture, accessible from *Meeting History* within the *Meeting View*.

If you would like to provide managers the ability to give *coaching*, the latest version of *Continuous Feedback* is a suitable replacement. The latest version of *Continuous Feedback* provides a way for those providing feedback to customize questions and provide more contextualized content for the recipient.

> ⚠ Caution
>
> The latest version of Continuous Performance Management (CPM) is opt-in and once upgrading to the latest CPM version, it **cannot** be undone. You **cannot** revert back to an older version of CPM. Please make sure that you've reviewed the feature differences before you upgrade.
>
> If you are on the legacy version of CPM and disable CPM via the *Performance Management Feature Settings* or Provisioning and then re-enable CPM, the enabled version is the latest version, not the legacy version.

Related Information

Configure Continuous Performance Management (Legacy) [page 93]
Creating Email Notifications (Legacy) [page 96]
Adding Reporting Permissions for Continuous Performance Management (Legacy) [page 97]
Adding Coaching Advice Via the Web Application [page 99]

7.5.1 Adding Coaching Advice Via the Web Application

As a manager, you can add coaching advice to the *Activities* view of your direct reports via the Web application.

Procedure

1. Go to the *Activities* view screen of the employee you want to view, and scroll to the *Coaching* section.

2. Click the *Edit Coaching* link.
3. Enter one thing that the employee did well, or one thing the employee can improve.
4. Click *OK*.

Results

The system adds the coaching advice for your employee. You can edit your comments whenever you want.

Related Information

Coaching (Legacy) [page 98]

7.6 Activities (Legacy)

In Continuous Performance Management, an activity enables you to keep a track of the items you're working on.

> **Note**
>
> The following section provides information about the legacy version of CPM. The latest version of Continuous Performance Management includes additional features and options, which aren't described here. For more information about the Activities features and options for the latest version, see the Continuous Performance Management topic at the beginning of this guide.

Activities can be personal to you or your direct reports, and they can be easily linked to one of the performance or development goals. For example, you might be working on a significant presentation to land a new client or contract. The activity might well have relevance to your performance goal of increasing revenue for the company by some percentage.

> **Note**
>
> You can link your activities to goals only in your default goal plan and default development goal plan.

The things you're working on may or may not be related to a goal, but they can be captured as activities. You can also request feedback on your activities.

While creating an activity, you need to associate a status with it. Your activities are sorted according to their status priorities. When the status of an activity changes to Complete, you get an option to directly create an achievement for the completed activity.

> **Note**
>
> As a manager, you can create, update, request feedback, or delete activities on behalf of the employees reporting to you. You can also add or remove updates from their activities.

Related Information

[Configure Continuous Performance Management (Legacy) [page 93]]
[Creating Email Notifications (Legacy) [page 96]]
[Adding Reporting Permissions for Continuous Performance Management (Legacy) [page 97]]
[The Activities View (Legacy) [page 107]]
[Topics (Legacy) [page 111]]
[The Meeting View (Legacy) [page 114]]
[Adding an Activity Via the Web Application (Legacy) [page 101]]
[Adding Updates with Flags Via the Web Application (Legacy) [page 103]]
[Requesting Feedback on an Activity (Legacy) [page 104]]
[Linking Activities to Goals (Legacy) [page 105]]

7.6.1 Adding an Activity Via the Web Application (Legacy)

You can create an activity either for yourself or for your direct reports, and link the activity to performance and development goals.

Context

> **Note**
>
> The following provides steps for the legacy version of the Activities. The latest version of Continuous Performance Management includes additional Activities features, for example, creating activities for multiple roles, which aren't described here. For more information about the features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

> **Note**
>
> To link your activities to performance and development goals, enable only the Continuous Performance Management permissions for your performance goal plan and development goal plan. When you enable the Continuous Performance Management permission on the default development goal plan template, you can't disable the ability to link activities to development goals.

Procedure

1. Click *Activities* > *Add Activity*, and enter an activity name.

> **i Note**
>
> As a manager, to add activities on behalf of an employee reporting to you, click the employee name on the left pane and then click *Add Activity*.

2. Select one of the following activity statuses from the dropdown list:

Option	Description
High	The activity is a high priority item, something you must attend to immediately.
Medium	The activity is a priority but it could wait a day or two.
Low	The activity should be taken up when you have time for it.
Complete	The activity has been successfully completed.
Paused	The activity is currently on hold.
Canceled	The activity is no longer being worked upon, but the details are preserved.

3. Link the activity to a performance goal, a development goal, or both, and click *Save*.

> **i Note**
>
> If a default development goal plan is enabled, there's no way to hide or disable the ability to link activities to development goals.

Next Steps

You can edit and delete the activities, using the *Action* icon corresponding to the activity.

> **i Note**
>
> The *Status* field for activities supports inline editing. You can edit the *Status* of the activity directly from the *Activities* view without having to edit the activity.

> **→ Tip**
>
> The latest version of Continuous Performance Management also support inline status editing by dragging and dropping activities as cards from one kanban board column to another.

Related Information

Activities (Legacy) [page 100]
The Activities View (Legacy) [page 107]
Topics (Legacy) [page 111]
The Meeting View (Legacy) [page 114]

7.6.2 Adding Updates with Flags Via the Web Application (Legacy)

You can add updates to an activity to share with your manager or with your direct reports. You can also flag the updates to signify their importance.

Context

> **i Note**
>
> The following provides steps for the legacy version of the Activities. The latest version of Continuous Performance Management includes additional features and options, which aren't described here. For more information about the Activities features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

Procedure

1. Go to the *Activities* view.
2. Enter your comment in the *Add an update* text box under the activity.
3. If your update is significant, select the flag icon to flag your update.
4. Choose *OK* to save the update.

Results

The update appears under the activity. You can edit the update, remove the flag, or delete the update.

> **i Note**
>
> Every activity update is stamped with the date on which it was either created or edited.

Related Information

Activities (Legacy) [page 100]
The Activities View (Legacy) [page 107]
Topics (Legacy) [page 111]
The Meeting View (Legacy) [page 114]

7.6.3 Requesting Feedback on an Activity (Legacy)

You can directly request feedback on your activity from multiple employees, at once, using the *Request Feedback* option available on the action menu of your activity. You can also request feedback on the activities of your direct reports.

Prerequisites

- Role-based permissions to request feedback on activities.
- Permission to view To Do notifications on the home page. If you're using home page v12, you must enable the *Admin Center* > *Company System and Logo Settings* > *Enable Todo Panel* option to get the feedback request notifications in the To Do panel, accessed from of the application header.
- Intelligent Services enabled, allowing user to send an e-mail notification for feedback requests. You can enable Intelligent Services using the *Upgrade Center*.

  > i Note
  >
  > E-mail notification uses the Intelligent Services event framework to recognize the creation of a feedback request. If you want to use the feedback request notification, enable Intelligent Services in your instance. However, the To Do notification on the home page isn't dependent on the Intelligent Services event framework.

- Optional: Enable e-mail notifications with deep link to the home page, so that users can easily provide feedback.

Context

Activities are an excellent way of tracking your work. The ability of requesting feedback for activities can help you plan and execute your work even better.

> i Note
>
> The following provides steps for the legacy version of the Feedback. The latest version of Continuous Performance Management includes additional feedback features, for example, Continuous Feedback and requesting feedback from multiple roles, which aren't described here. For more information about the feedback features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

Procedure

1. Go to the *Activities* view in *Continuous Performance*.
2. Click the action menu on the activity you want to request feedback for, and select *Request Feedback*. The *Request Feedback* dialog box appears.

3. In the *From* field, type and select the name of the employee you want to send the feedback request to.

> **Note**
>
> You can send the feedback request to one or more employees, simultaneously. When you search for employees, their job titles appear beneath their names. This helps you distinguish between employees with similar names. Even if you add multiple employees to the *From* field, individual requests are sent to each employee, so none of the employees can see who else received the same request.

4. A default message is available in the *Request Feedback* dialog box. You can either modify it or use it verbatim, and click *Send*.

Results

A confirmation message appears that indicates your feedback request has been successfully sent. If the e-mail notification for Continuous Feedback Responded Request Notification has been configured, you get an e-mail notification providers post their feedback comments.

Related Information

Activities (Legacy) [page 100]
The Activities View (Legacy) [page 107]
Topics (Legacy) [page 111]
The Meeting View (Legacy) [page 114]
Configuring Role-Based Permissions

7.6.4 Linking Activities to Goals (Legacy)

To measure progress toward meeting performance or development goals, you link activities.

Prerequisites

- Your role is given permission to view and edit activities.
- You have permission to a Performance goal plan or a Development goal plan or both.
- You have at least one goal added to either of your goal plans.

Context

> **i Note**
>
> The following provides information about the legacy version of CPM. The latest version of Continuous Performance Management includes additional features and options, which aren't described here. For more information about the latest version, see the Continuous Performance Management topic at the beginning of this guide.

When you have a default performance goal plan, and there is at least one goal in that plan, a dropdown for linking an activity to a performance goal is shown.

If a user has at least one development goal in their development goal plan, the ability to link an activity to a development goal is shown,

You can do the following for activities and goals:

- Link an activity to a performance or development goal.
- View activities by a performance or development goal.
- View the link between the activity and the goals in the *Activity Details* view.

  > **i Note**
  >
  > If a user has permission to edit activities but not achievements, and the user drags an achievement out of *Prompt Achievement Creation*, the achievement is deleted on the activity.

- View all the linked goals, by goals, in meeting mode and in the meeting history page.
- Edit the name and details of any of the linked goals from the *My Activities* Kanban board.

  > **i Note**
  >
  > The latest version (2H 2020) of Continuous Performance Management must be enabled for this feature.

  > **⚠ Caution**
  >
  > The latest version of CPM (2H 2020) is opt-in and once upgrading to the latest Continuous Performance Management, it **cannot** be undone. You **cannot** revert back to an older version of CPM. Please make sure that you have reviewed the feature differences before you upgrade.

- Change the link from one goal to another from the *Activities Detail* view.

When the latest version (2H 2020) of Continuous Performance Management is enabled, you use the Kanban board for showing the relationship between activities and goals.

Related Information

Activities (Legacy) [page 100]
The Activities View (Legacy) [page 107]
Topics (Legacy) [page 111]
The Meeting View (Legacy) [page 114]

7.6.5 The Activities View (Legacy)

In the Continuous Performance Management *Activities* view, users can easily create, manage, and update records of their activities.

> **i Note**
>
> The following section provides information about the legacy version of CPM. The latest version of Continuous Performance Management includes additional features and options, which aren't described here. For more information about the latest version, see the Continuous Performance Management topic at the beginning of this guide.

In the *Activities* view you can track your work and the work of your direct reports. You can create and monitor activities, assign statuses to the activities, and link the activities to goals. You can also add updates to the activities, flag the updates you deem important, and request feedback on activities. You can add discussion items that aren't task-related to the *Activities* view.

The *Activities* view supports coaching. Managers can add activities on which direct reports did well and activities on which they can improve.

Activities often are linked with performance goals. An activity can be a task a user must complete toward achieving a goal. The *Activities* view allows users to sort activities both by status and by related performance goals. Every activity has a status value attached to it that indicates the progress of the activity.

A Kanban board enables you to optimize the flow of your activities. Activity cards in the Kanban board show important details of activities, such as whether an activity has been updated or tagged as an achievement. You can drag and drop cards within the Kanban board to reorder them.

Every activity in Continuous Performance Management has a status value attached to it that indicates the progress of the activity.

Functions

You can configure the activity status values to best suit your business needs. Using the *Activities View* section on the *Admin Center* > *Performance Management* > *Continuous Performance Management* page. You can:

- **Create a new activity status**: Click the *Create New Activity Status* link, and a new activity status is appended to the table of activity status values. Enter a UI label for the custom status value, and click *Save*. The newly added value appears in the activity status list when you change the status for new or existing activities.
- **Delete the unwanted status values**: For the activity status values that you want to remove, click the delete icon next to the status value, and click *Delete*.

  > **i Note**
  >
  > When you delete a status value that was in use, all the past activities that used the status retain the value. Also, after you delete an activity status value, it continues to appear in the activity status list, but the value can't be selected. You can replace the deleted value with a new status value or any other available status value.

- **Shuffle the order of the activity status values**: Select an activity status, and click the *Re-Order Activity Status* arrows to move the activity status above or below its current position. The status values appear in the same order in the activity status list.

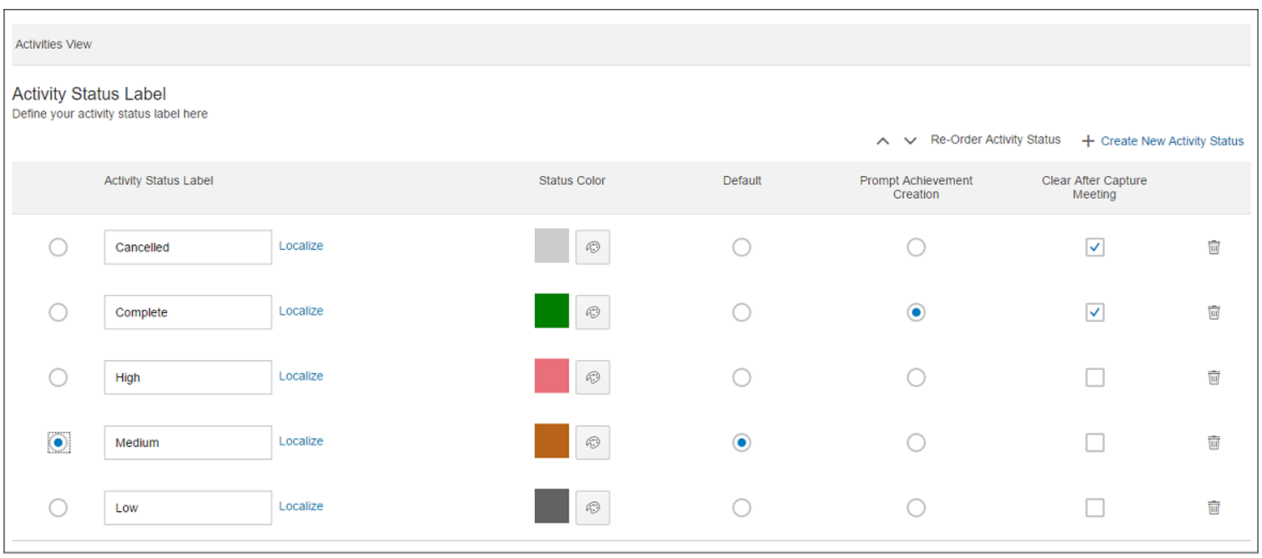
> **i Note**
>
> The *Re-Order Activity Status* arrows appear above the activity list table only when you select an activity status.

- **Localize a user interface label**: Click *Localize* and you can update the *Label* in different languages.
- **Customize the color of the user interface label**: Click the *Color Palette* icon corresponding to an activity status. Modify the color and click *OK*.

> **⚠ Caution**
>
> Only a limited set of semantic colors is supported on the SAP SuccessFactors mobile application for iOS devices to more clearly display the value of data points in either a positive, negative, or critical manner. If you associate the activity statuses with any other color, the iOS device simply renders the activity status colors as grayscale.

> **i Note**
>
> .

- **Set the default status for new activities**: Select the *Default* option next to an activity status to configure it as the default status for newly created activities.
- **Set an activity status as the milestone for creating an achievement**: Select an activity status, which indicates that the work done on the activity qualifies for creating an achievement. In the *Prompt Achievement Creation* column, select a status value at which users receive a system prompt to create an achievement for the activity.
- **Set status values that clear the activities after a meeting has been captured**: Select the *Clear After Capture Meeting* option for status values that will force the clearing of activities from the queue, which in turn will remove those activities from the *Activities* tab after you capture a meeting.



ℹ Note

You can remove all the existing activity status values and create new status values that align to your business process. However, when you add a new activity, the system requires a status value. So, either add or retain at least one activity status value for using Continuous Performance Management.

Related Information

Activities (Legacy) [page 100]
Adding an Activity Via the Web Application (Legacy) [page 101]
Adding Updates with Flags Via the Web Application (Legacy) [page 103]
Requesting Feedback on an Activity (Legacy) [page 104]
Linking Activities to Goals (Legacy) [page 105]
Configuring Continuous Performance Management Achievements View by Goals in Performance Forms (Legacy) [page 109]
Color Codes for Activity Status on the SuccessFactors Mobile App for iOS (Legacy) [page 110]

7.6.5.1 Configuring Continuous Performance Management Achievements View by Goals in Performance Forms (Legacy)

You can configure the *Activities* tab so that the system displays activities tagged as Achievements on your Performance Forms.

Prerequisites

- Performance Management v12 Acceleration
- Continuous Performance Management (CPM)
- Product edition: Enterprise or SPRAC

Context

The role-based permissions you set for Continuous Performance Management (CPM) make your performance review form visible to you and to your direct reports. Enable the following permissions for users to have access to their CPM *Achievements* viewable by *Goals* on the *Performance Management* form.

> **i Note**
>
> The following steps are for the legacy version. For the latest version of Continuous Performance Management see the section: Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite in this guide for those instructions.

Procedure

1. Go to *Admin Center* > *Manage Permission Roles*.
2. Choose the *Permission* button and go to *Continuous Performance Management*. Ensure that the user role has permissions to *Achievements*.
3. Return to the *Admin Center* and go to *Form Template Settings*.
4. Select the *Performance Management Form* you want to edit.
5. For *Performance Goals*: Check *Enable Achievements tab in Performance Goal Section*. If you want to display linked feedback as well, also check the *Display Achievement Feedback in Performance Goal Achievements* subitem.
6. For *Development Goals*: Check *Enable Achievements tab in Development Goal Section*. If you want to display linked feedback as well, also check the *Display Achievement Feedback in Development Goal Achievements* subitem.
7. Choose *Update Form Template* to save the Form Template.

   > **→ Remember**
   >
   > The user must have permissions to *Goal Management Access*, *Goal Plan Permission*, and *Continuous Performance Management* for access to their Achievements and Goals and to view in the forms.

Related Information

The Activities View (Legacy) [page 107]
Color Codes for Activity Status on the SuccessFactors Mobile App for iOS (Legacy) [page 110]

7.6.5.2 Color Codes for Activity Status on the SuccessFactors Mobile App for iOS (Legacy)

To use SAP SuccessFactors in both the iOS mobile application and in a browser, associate your activity status values only with these color codes.

These colors clearly display activity status values on the SAP SuccessFactors Mobile apps for iOS and in web browsers.

Note

If you don't use the SAP SuccessFactors Mobile application for iOS devices, you can choose any color for the activity status values. All colors render correctly in the Web application.

Caution

If you select any other color code for the activity statuses, the iOS device renders the activity status colors as grayscale.

Color	Color code for normal use	Higher contrast color codes for Accessibility
Red	#F40000	#B60000
Yellow	#FFB200	#9D6E00
Green	#1F8D58	#135C39
Gray	#8E8E8E	#8E8E8E

Tip

You can apply the same color code to multiple activity status values. For example, you can use:

- Red: #F40000 for Critical
- Red: #F40000 for Important
- Yellow: #FFB200 for Medium
- Green: #1F8D58 for Completed

Related Information

The Activities View (Legacy) [page 107]
Configuring Continuous Performance Management Achievements View by Goals in Performance Forms (Legacy) [page 109]

7.6.6 Topics (Legacy)

In Continuous Performance Management, a *Topic* is a document describing a discussion item that is beyond the scope of your current activities.

Note

The following section provides information about the legacy version of CPM. The latest version of Continuous Performance Management includes additional features, which aren't described here. For more information about the features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

You can discuss the content of any *Topic* during your 1:1 meetings with your manager or direct reports. You can add topics to discuss with your manager. If you're a manager, you can add topics on behalf of the employees reporting to you.

Related Information

Activities (Legacy) [page 100]
Adding an Activity Via the Web Application (Legacy) [page 101]
Adding Updates with Flags Via the Web Application (Legacy) [page 103]
Requesting Feedback on an Activity (Legacy) [page 104]
Linking Activities to Goals (Legacy) [page 105]
Adding a TopicVia the Web Application (Legacy) [page 112]
Refreshing the Topic List (Legacy) [page 113]
Editing or Deleting a Topic Via the Web Application (Legacy) [page 114]

7.6.6.1 Adding a TopicVia the Web Application (Legacy)

With the Web application, you can add a *Topic* describing anything you want to discuss with your manager or direct reports.

Context

> **Note**
>
> The following provides steps for the legacy version of CPM. The latest version of Continuous Performance Management includes additional features, which aren't described here. For more information about the features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

Procedure

1. In the SAP SuccessFactors web application, go to the *Continuous Performance* module.
2. In the *Activities* view, scroll down to the *Topics* section.
3. Click the *Add Topic* link.
4. Enter an item for discussion in the text box that appears, and click *OK*.

Results

The system creates a *Topic*. An empty circle at the beginning of a *Topic* indicates that the *Topic* is open for discussion.

> **i Note**
>
> You can't add comments to a *Topic*.

Related Information

Topics (Legacy) [page 111]

7.6.6.2 Refreshing the Topic List (Legacy)

If a few lines of your previous *Topic*s disappear, you can resolve the issue as follows.

Context

> **i Note**
>
> The following provides steps for the legacy version of CPM. The latest version of Continuous Performance Management includes additional features, which aren't described here. For more information about the features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

Procedure

1. Go to *Admin Center* > *OData API Metadata Refresh And Export* and click *Refresh*.
2. After the system refreshes the metadata, log out and log in to your instance. Check your *Topic*s in *Continuous Performance*.

Related Information

Topics (Legacy) [page 111]

7.6.6.3 Editing or Deleting a *Topic* Via the Web Application (Legacy)

You can edit or delete the contents of a *Topic*.

Context

> **i Note**
>
> The following provides steps for the legacy version of CPM. The latest version of Continuous Performance Management includes additional features, which aren't described here. For more information about the features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

Procedure

1. Click the arrow for the *Topic*, and select *Edit* or *Delete*.
2. When your discussion is complete, click the empty circle at the beginning of the *Topic*.

   The circle gains a tick mark and changes its color to green. The *Topic* is struck out to indicate that you've discussed the contents of the *Topic*.

Related Information

Topics (Legacy) [page 111]

7.6.7 The Meeting View (Legacy)

Continuous Performance Management offers a dedicated meeting view that supports 1:1 meetings.

> **i Note**
>
> The following section provides information about the legacy version of CPM. The latest version of Continuous Performance Management includes additional features and options, which aren't described here. For more information about the latest version, see the Continuous Performance Management topic at the beginning of this guide.

In the meeting view, users see a list of all current activities. Users can sort this list by status or by goal. In many organization, managers and employees have quarterly goal check-ins. They can, for example, use the *View by Goal* filter to facilitate those discussions.

You can view the title and the details of performance and development goals linked with the activity, in the meeting snapshots, using the *View Details* option on the action menu of the activity.

The meeting view includes a tool for documenting discussion topics. You can use discussion topics to create a shared meeting agenda, or action items. You could also use discussion topics to document issues that fall outside the realm of an activity, but are still worthy of discussion.

The meeting view includes a section for meeting notes. Users no longer have to take personal notes outside of the solution. With the meeting notes feature, managers and employees can keep their private notes in the system. Managers and employees can refer to those notes in any subsequent 1:1 meeting. Meeting notes provide discussion continuity and alignment.

Once the meeting is complete, either the manager or the employee can capture the contents of the meeting. When you capture a meeting, Continuous Performance Management takes a snapshot of the contents of the meeting. Either attendee of the meeting can revisit the contents of the meeting in the meeting history.

If you capture a meeting before an activity attached to the meeting is completed, the meeting snapshot includes the current incomplete state of the activity. If you capture the same meeting again after the activity has been completed, the second meeting snapshot adds the new completed state of the activity without overwriting or deleting the earlier state of the activity. The meeting snapshot includes both states of the activity, each with a unique activity ID.

Capturing the meeting also confirms that the meeting occurred. The system displays the number of days since your last 1:1 meeting in the *Conduct 1:1 Meetings To-Do* tile on the home page.

Related Information

Activities (Legacy) [page 100]
Adding an Activity Via the Web Application (Legacy) [page 101]
Adding Updates with Flags Via the Web Application (Legacy) [page 103]
Requesting Feedback on an Activity (Legacy) [page 104]
Linking Activities to Goals (Legacy) [page 105]
Capturing the Contents of a Meeting Via the Web Application (Legacy) [page 116]
Viewing Captured Meeting Content Via the Web Application or Android Application (Legacy) [page 116]

7.6.7.1 Capturing the Contents of a Meeting Via the Web Application (Legacy)

Once you've completed a 1:1 meeting with your manager or direct report, either of you can capture the contents of the meeting via the Web application.

Context

The following steps provide the procedure for capturing meeting content using the legacy version of Continuous Performance Management (CPM). Skip this procedure, if you're using the latest version of Continuous Performance Management.

Procedure

1. Launch Continuous Performance Management
2. On the *Activities* view, select *Capture Meeting*.
3. After entering meeting notes, choose *Save and Finish*.

Related Information

The Meeting View (Legacy) [page 114]
Capturing Meeting Notes for 1:1 Via the Web Application (Latest Version) [page 86]

7.6.7.2 Viewing Captured Meeting Content Via the Web Application or Android Application (Legacy)

You can find and view the content of captured meetings via the Web application or the Android application.

Context

> **i Note**
>
> The following provides steps for the legacy version of the Meetings. The latest version of Continuous Performance Management includes additional features, which aren't described here. For more information about the features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

Procedure

1. Launch Continuous Performance Management.
2. Browse through the dates of past captured dates using the calendar display. You can navigate between dates by using the left and right arrows, around the date.
3. To return to the current date on the *Activities* view on the web application, click *Go To Today*.

Related Information

The Meeting View (Legacy) [page 114]

7.7 Feedback (Legacy)

The *Feedback* view enables employees to provide feedback to, and to receive feedback from any other employees in the organization.

You can view all the feedback comments that you've received, with the names of the feedback providers and the dates on which the feedback was posted.

> i Note
>
> The following section provides information about legacy version feedback. The latest version of Continuous Performance Management includes additional features, for example, Continuous Feedback, that isn't described here. For more information about the features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

> ⚠ Caution
>
> The latest version of Continuous Performance Management (CPM) is opt-in. Existing implementations can continue using the legacy version, though only the latest version is available for upgrades.
>
> Once upgrading to the latest CPM version, it **cannot** be undone. You **cannot** revert back to an older version of CPM. Please make sure that you've reviewed the feature differences before you upgrade.
>
> If you are on the legacy version of CPM and *disable* CPM via the *Performance Management Feature Settings* or Provisioning and then *re-enable* CPM, the enabled version is the **latest version**, not the legacy version.

Continuous Feedback can be selected from the module picker.

Related Information

Configure Continuous Performance Management (Legacy) [page 93]

Creating Email Notifications (Legacy) [page 96]
Adding Reporting Permissions for Continuous Performance Management (Legacy) [page 97]
The Feedback View [page 118]
Viewing Feedback Requests (Legacy) [page 120]
Providing Feedback (Legacy) [page 121]
Requesting Feedback (Legacy) [page 123]

7.7.1 The *Feedback* View

The *Feedback* view enables employees to provide feedback to, and to receive feedback from any other employees in the organization.

The *Feedback* view helps you share your feedback directly with any employee through a channel that is integral to the solution.

You can view all the feedback comments that you've received, with the names of the feedback providers and the dates on which the feedback was posted. In the *Feedback* view, you can:

- Link the feedback to an activity and an achievement.
- Manage the visibility of your comments and delete the comments, if they weren't requested or provided by your manager.

  > **i Note**
  >
  > Neither you nor your manager can delete the feedback comments that you receive from your manager.

- View the feedback comments that your direct reports have received.

Related Information

Feedback (Legacy) [page 117]
Viewing Feedback Requests (Legacy) [page 120]
Providing Feedback (Legacy) [page 121]
Requesting Feedback (Legacy) [page 123]
Accessing the Feedback View Via the Web Application [page 119]

7.7.1.1 Accessing the Feedback View Via the Web Application

The *Feedback* view enables employees to provide feedback to, and to receive feedback from any other employee in the organization.

Context

You can view all the feedback comments that you've received, with the names of the feedback providers and the dates on which the feedback was posted.

Procedure

Log in to the web application, and go to the *Continuous Performance* module. By default, the system displays the *Feedback* view for your profile.

Results

The system displays the *Feedback* view.

Next Steps

To view the feedback comments that one of your direct reports has received, choose the name of the direct report under *My Team* on the left pane.

Related Information

The Feedback View [page 118]

7.7.2 Viewing Feedback Requests (Legacy)

The *View Feedback Request* option enables you to view all the feedback requests you have sent in the past, including information about the employee you sent the feedback request to, the request message, the request date, and status of the request (pending or responded).

Prerequisites

- Role-based permission to request feedback on activities.
- Role-based permission to send feedback requests to direct reports and selected others.
- Role-based permission to request feedback about employees included in the target population.

Context

The *View Feedback Request* option enables you to view all your previously sent requests. It helps you check the status of the requests, reuse the content from the previously sent messages, and consider whether is time for sending follow-up requests.

> **i Note**
>
> The following section provides steps for the legacy version of the Feedback. The latest version of Continuous Performance Management includes additional feedback features, for example, Continuous Feedback and providing feedback to multiple roles, which aren't described here. For more information about the feedback features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

Procedure

On the *Feedback* view, click *View Feedback Request*. The *Feedback Request* dialog box appears.

Results

You can view all the feedback requests sorted chronologically, with the most recent ones at the top to the oldest at the bottom.

> **i Note**
>
> - As an employee, you can only view the feedback requests that you have sent. You cannot view the feedback requests that your manager has sent on your behalf.

- As a manager, when you access the *View Feedback Request* option from the *Feedback* view of your direct reports, you can only view the feedback requests you have sent on behalf of them. You cannot view the feedback requests sent by your direct report.

Related Information

[Feedback (Legacy) [page 117]]
[The Feedback View [page 118]]
[Configuring Role-Based Permissions]

7.7.3 Providing Feedback (Legacy)

Employees can give feedback to any employee within the group, defined by the target population in the role-based permissions.

Context

Continuous feedback enables your employees to provide feedback to their peers within a defined group, without any formal review process. The feedback gets recorded directly into the system. It helps employees appreciate their peers for the good work they do, and to suggest to them areas of focus to further enhance their performance.

> **Note**
>
> The following provides steps for the legacy version of the Feedback. The latest version of Continuous Performance Management includes additional feedback features, for example, Continuous Feedback and providing feedback to multiple roles, which aren't described here. For more information about the feedback features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

Procedure

1. On the *Feedback* view, choose *Give Feedback*. The *Give Feedback* dialog box appears.

   > **Note**
   >
   > You can also use the *Give Feedback* tile on the *My Info* section of the Home view.

2. In the *To* field, enter the name of the employee you're providing the feedback to. The matching employee records appear in a dropdown menu.

i Note

When you start entering an employee name, the employee's photo appears next to the employee name in the dropdown, only if the ▶ *Company Settings* ▶ *Enable photos in autocompletion find in the UI* ◀ option in *Provisioning* has been enabled.

> **→ Remember**
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

3. Select the name or names of the employees you want to receive the feedback. The employee name is added to the recipient list.

i Note

If you want to provide the same feedback to multiple employees, add multiple recipients in the *To* field. When you search for employees, their photos (if available) and job titles appear with their names, which help you distinguish between employees with similar names.

If you add multiple employees to the *To* field, individual feedback is sent to each employee. A message is displayed for each recipient giving the names of all the employees who received the same feedback.

4. Enter your feedback comments in the text box, and click *Send*.

Results

The system displays a confirmation message indicating the system has sent your feedback.

Related Information

Feedback (Legacy) [page 117]
The Feedback View [page 118]

7.7.4 Requesting Feedback (Legacy)

Employees can request feedback about their work from one or more employees in the group. You can determine the membership of a group in the role-based permissions.

Context

With continuous feedback you can request performance feedback from peers or direct reports without any formal review process.

> **i Note**
>
> The following provides steps for the legacy version of the Feedback. The latest version of Continuous Performance Management includes additional feedback features, for example, Continuous Feedback and requesting feedback from multiple roles, which aren't described here. For more information about the feedback features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

Procedure

1. On the *Feedback* view, choose *Request Feedback*. The *Request Feedback* dialog box is shown.

   > **i Note**
   >
   > If the new Home user experience (2H 2020), has been enabled, you can also use *Request Feedback* on the *Quick Actions* section of the new *Home Page*.

2. In the *From* field, enter the name of the employee from whom you're requesting feedback. The matching employee records, including the employee photos, shows in a dropdown menu.

   > **i Note**
   >
   > If the employee photos don't appear in the dropdown, setting are required to enable photos in autocompletion. The settings are enabled with *Provisioning* > *Company Settings* > *Enable photos in autocompletion find in the UI*.
   >
   > > **→ Remember**
   > >
   > > As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

3. Select the intended employee record. The employee name is added to the recipient list.

   > **i Note**
   >
   > You can request feedback from up to 10 people by adding multiple recipients in the *From* field. When you search for employees, their photos and job titles appear with their names. This helps you distinguish

> between employees with similar names. Select the name desired. Even if you add multiple employees to the *From* field, individual requests are sent to each employee. None of the employees can tell who else received the same request.

4. Enter your request in the text box, and choose *Send*.

   The system sends a confirmation message indicating your feedback request has been sent.

Results

If your e-mail notifications are configured, you get notified when you receive feedback on your requests.

> → Remember
>
> Initially, the response you receive on your feedback requests is visible only to you. To make the feedback visible to your manager, check the *Visible to my manager* box.

> i Note
>
> - You can link the feedback you receive to an activity or to an achievement.
> - As a manager, you can't link the feedback comments of your direct reports to their activities or achievements.
> - The feedback comments received on manager requests always are visible to the requesting manager.
> - You can delete only the responses received on your own feedback requests. You can't delete the feedback received on requests from your manager.

Related Information

Feedback (Legacy) [page 117]
The Feedback View [page 118]

7.8 Achievements (Legacy)

You can add achievements for yourself and on behalf of the employees reporting to you.

The achievements you add may or may not have any relationship to your activities. For example, you may volunteer to do something as part of a corporate initiative around volunteerism, or you might have stepped in at the last minute to close a sales deal. Such participation may not be noted as an activity, but it certainly can count as an achievement.

> i Note
>
> The following section provides information about legacy version Achievement. The latest version of Continuous Performance Management includes additional features that won't be described here. For more information

about the features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

⚠ Caution

The latest version of Continuous Performance Management (CPM) is opt-in. Existing implementations can continue using the legacy version, though only the latest version is available for upgrades.

Once upgrading to the latest CPM version, it **cannot** be undone. You **cannot** revert back to an older version of CPM. Please make sure that you've reviewed the feature differences before you upgrade.

If you are on the legacy version of CPM and *disable* CPM using either the *Performance Management Feature Settings* or Provisioning and then *re-enable* CPM, the enabled version is the **latest version**, not the legacy version.

Related Information

Configure Continuous Performance Management (Legacy) [page 93]
Creating Email Notifications (Legacy) [page 96]
Adding Reporting Permissions for Continuous Performance Management (Legacy) [page 97]
The Achievements View (Legacy) [page 125]
Configuring the Goal Plan Tab to Show Achievements (Legacy) [page 128]
Configuring the Development Plan Tab to Show Achievements (Legacy) [page 130]
Configuring the Calibration Sessions Tab to Show Achievements (Legacy) [page 131]
Configuring Compensation Worksheets to Show Achievements (Legacy) [page 132]
Requesting Achievement Feedback Using the Web Application (Legacy) [page 133]

7.8.1 The Achievements View (Legacy)

The legacy version *Achievements* view lets you view your achievements and those of your direct reports.

With the *Achievements* view, you can capture achievements when they occur. The *Achievements* view groups your achievements by time and by goals. Your manager can view the achievements you accumulate each month. Also, your manager can view the number of achievements that are linked to your performance and development goals.

ℹ Note

The following section provides information about legacy version of the Achievements view. The latest version of Continuous Performance Management includes additional features for Achievements that aren't described here. For more information about the Achievements features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

The *Achievements* view lets users view all their activities that are tagged as achievements. If you have multiple achievements linked to a single activity, you can view those achievements through this view.

With the *Achievements* view users can do the following:

- View all achievements chronologically.
- View activity details when clicking on an achievement.
- Filter achievements by date range.

The *Achievements* tab is visible for all users, but you can view only the Continuous Performance Management data for which you have the necessary permissions.

Related Information

Achievements (Legacy) [page 124]
Configuring the Goal Plan Tab to Show Achievements (Legacy) [page 128]
Configuring the Development Plan Tab to Show Achievements (Legacy) [page 130]
Configuring the Calibration Sessions Tab to Show Achievements (Legacy) [page 131]
Configuring Compensation Worksheets to Show Achievements (Legacy) [page 132]
Requesting Achievement Feedback Using the Web Application (Legacy) [page 133]
Accessing the Achievements View Via the Web Application (Legacy) [page 126]
Configuring the Performance Form to Show Achievements (Legacy) [page 127]

7.8.1.1 Accessing the Achievements View Via the Web Application (Legacy)

The *Achievements* view lets you view your achievements and those of your direct reports.

Procedure

1. Log in to the web application, and go to the *Continuous Performance* module. By default, the system displays the *Activities* view for your profile.
2. Click the *Achievements* button.

   The system displays the *Achievements* view containing these two tabs:
   - *By Time* Under this tab, the achievements are listed in a chronological order. By default, the *Achievements* view is grouped by time.
   - *By Goal* Under this tab, the achievements are grouped by the goals they're linked with, under two subtabs: *By Performance Goal* and *By Development Goal*.

     > **i Note**
     >
     > You can link an achievement with a performance goal or a development goal, both directly and indirectly, via the activity. If an achievement has links with two different goals the achievement could be listed under both the *By Performance Goal* subtab and the *By Development Goal* subtab.

Next Steps

You can also access the achievements of your direct reports. Click the name of a direct report under *My Team* on the left pane. Then click the *Achievements* tab.

Related Information

The Achievements View (Legacy) [page 125]

7.8.1.2 Configuring the Performance Form to Show Achievements (Legacy)

Customers have the option of allowing Continuous Performance Management Achievements (or activities tagged as achievements) to integrate into a Performance Form. If the performance form includes sections for performance and development goals, achievements linked to and shown on performance form goals.

Prerequisites

- Performance Management v12 Acceleration
- Role-based permissions to access Continuous Performance Management
- Role-based permissions granted on the Achievement entity for users
- Product edition: Enterprise or SPRAC
- Goal Management and/or Career Development Plan is enabled

Context

Additional settings are required to allow achievements to be shown in the performance form.

> **Note**
>
> The following section provides for the legacy version. For the latest version of Continuous Performance Management see the section: Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite in this guide for those instructions.

Procedure

1. Go to Admin Center > Tools > Manage Permission Roles > Select Role > Permission > Continuous Performance Management, and under *Achievement*, select *View*.
2. Go to Admin Center > Tools > Form Template Settings > 2018 Performance Review Extended. Select *Enable Achievements tab in Performance Goal Section* and *Enable Achievements tab in Performance Development Goal Section*.
3. Click *Update Form Template*.

Results

The system displays the *Achievements* tab on your Performance Review form and Development Goals form. The *Achievements* tab is visible only to users who have the necessary role-based permissions to access your Performance Review form and Development Goals form, and to view your achievements.

> → Remember
>
> Achievements are only visible within the date range of the form. For example, a Development Goals form begins 1st July and ends in 31st July. If an achievement for the goal is from 1 August, then that achievement won't be included in the form.

Related Information

The Achievements View (Legacy) [page 125]
Configuring Role-Based Permissions

7.8.2 Configuring the Goal Plan Tab to Show Achievements (Legacy)

You can link the achievements added through the Continuous Performance Management solution to your default performance goals.

Prerequisites

- The product edition is either Enterprise or SPRAC.
- Goal Management (GM v12) is configured as described in the implementation guideGoal Management
- Role-based permissions to view achievements on goal plan

Context

Linking achievements to performance goals enables you and your manager to view your achievements, and the feedback you received on your achievements, directly in your default goal plan.

> **i Note**
>
> The following provides for the legacy version. For the latest version of Continuous Performance Management see the section: Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite in this guide for those instructions.

Procedure

1. Go to *Admin Center*.
2. In the *Tools Search* field, search for *Manage Templates*. The system displays the *Manage Templates* page.
3. Click the *Goal Plan* tab, and open the goal plan template in which you want to include the Continuous Performance Management Achievements.
4. Click the *General Settings* tab, select *Display Continuous PM Achievements* on your goal plan, and click *Save*.

Results

The system displays the Continuous Performance Management Achievements column in your default goal plan. For more information on the goal plan template, refer to the Goal Management implementation guide.

Related Information

Achievements (Legacy) [page 124]
The Achievements View (Legacy) [page 125]
Configuring Role-Based Permissions

7.8.3 Configuring the *Development Plan* Tab to Show Achievements (Legacy)

You can link the achievements that you add through Continuous Performance Management to your default development goals.

Prerequisites

- The product edition is either Enterprise or SPRAC
- Role-based permissions to access Continuous Performance Management
- Role-based permissions to access Career Development Planning

Context

Linking your achievements to your development goals enables you and your manager to view your achievements, and the feedback you received on your achievements, directly in your default development plan.

> **i Note**
>
> The following section provides for the legacy version. For the latest version of Continuous Performance Management see the section: Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite in this guide for those instructions.

> **i Note**
>
> This is an SAP SuccessFactors Business Beyond Bias feature. Use it to support processes that detect, prevent, or eliminate the influence of bias, helping you achieve your diversity and inclusion goals.

Procedure

1. Go to *Admin Center*.
2. In the *Tools Search* field, search for *Manage Templates*. The system displays the *Manage Templates* page.
3. Click the *Development* tab, and open the development plan template in which you want to include the Continuous Performance Management Achievements.
4. Click the *General Settings* tab, select *Display Continuous PM Achievements on Development goal plan*, and click *Save*.

Results

The system displays the Continuous Performance Management Achievements column in the development plan you modified. For more information on the development plan template, refer to the Career Development Planning implementation guide.

Related Information

Achievements (Legacy) [page 124]
The Achievements View (Legacy) [page 125]
Configuring Role-Based Permissions

7.8.4 Configuring the Calibration Sessions Tab to Show Achievements (Legacy)

You can link the achievements that you add via the Continuous Performance Management solution to your Calibration *Sessions* template.

Prerequisites

- The product edition must be either Enterprise or SPRAC
- Permission to access Calibration
- Role-based permission to access Continuous Performance Management

Context

> **Note**
>
> The following section provides for the legacy version. For the latest version of Continuous Performance Management see the section: Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite in this guide for those instructions.

Linking achievements to the *Sessions* tab enables managers to view the achievements of their direct reports in Calibration sessions.

> **Note**
>
> You can enable only managers to view employee Continuous Performance Management achievements.

Procedure

1. Go to *Admin Center*.
2. In the *Tools Search* field, search for *Manage Calibration Templates*.

   The system displays the *Manage Calibration Templates* page.
3. Click the Calibration template in which you want to include the Continuous Performance Management achievements.
4. Click the *Data* tab, scroll down, and select *Others*.
5. Select *Allow access to Continuous Performance Management Achievements*, and click *Save*.

Results

The system displays the Continuous Performance Management achievements in a dropdown option for the subjects in the Calibration session.

Related Information

Achievements (Legacy) [page 124]
The Achievements View (Legacy) [page 125]
Configuring Role-Based Permissions

7.8.5 Configuring Compensation Worksheets to Show Achievements (Legacy)

You can link achievements to a Compensation template.

Prerequisites

- The product edition must be either Enterprise or SPRAC.
- Permissions to access *Compensation*
- Role-based permission to access Continuous Performance Management

Context

You can directly view achievements in the compensation worksheets that are based on that Compensation template. With achievements linked to Compensation, the system displays *CPM Achievements* on the dropdown list of the compensation worksheet. Planners, who make compensation decisions, can then access employee achievements directly from the compensation worksheet.

> **i Note**
>
> The following provides for the legacy version. For the latest version of Continuous Performance Management see the section: Continuous Performance Management Integration Across the SAP SuccessFactors HXM Suite in this guide for those instructions.

Procedure

1. Go to *Admin Center* > *Compensation Home*.
2. Select a compensation plan template.
3. Go to *Plan Setup* > *Settings* > *Advanced Settings*, and select *Allow access to Continuous Performance Management Achievement view*. Click *Update Form Template*.

   You can now access the *Achievements* tab from the compensation worksheet .
4. Go to *Compensation*.
5. Select a *Compensation worksheet* based on the selected *Compensation Plan* template.
6. To view the achievements of any employee, click the corresponding menu icon, and select *Open Achievements*.

Related Information

Achievements (Legacy) [page 124]
The Achievements View (Legacy) [page 125]
Configuring Role-Based Permissions

7.8.6 Requesting Achievement Feedback Using the Web Application (Legacy)

You can request feedback on your achievements from multiple employees simultaneously.

Prerequisites

- Role-based permissions to access *Continuous Performance Management.*
- Role-based permissions to request feedback on activities.
- Role-based permissions to request feedback from a defined set of employees within the organization.

- To Do notifications on the Home page enabled. If you're using Home page v12, you must enable the *Admin Center* > *Company System and Logo Settings* > *Enable Todo Panel* option to get the feedback request notifications in the *To Do* panel, accessed from of the application header.

> **Note**
>
> If you're using the Web application, then enabling the *To Do* notifications is a must. However, if you use the SAP SuccessFactors mobile application for requesting or providing feedback on Achievements, you don't have to depend on the *To Do* notification settings.

- Intelligent Services enabled for your instance (to send e-mail notifications for your feedback request) You can enable it using the *Upgrade Center*.

> **Note**
>
> E-mail notification uses the Intelligent Services event framework to recognize the creation of a feedback request. If you want to use feedback request notification, have Intelligent Services enabled in your instance. However, the *To Do* notification on *Home* page isn't dependent on the Intelligent Services event framework.

- E-mail notifications with deep links to the *Home* page enabled (so that users can easily provide feedback)

Context

After you record an achievement in Continuous Performance Management, you can ask your managers and peers to provide their views on your achievement. You can also request feedback on the achievements of your direct reports from anyone they worked with, in the organization. Use the *Request Feedback* option available on the action menu of your achievement.

> **Note**
>
> The following provides steps for the legacy version of the Achievement feedback. The latest version of Continuous Performance Management includes additional feedback features, for example, Continuous Feedback and requesting feedback from multiple roles, which aren't described here. For more information about the feedback features of the latest version, see the Continuous Performance Management topic at the beginning of this guide.

Procedure

1. Go to the *Achievements* view in *Continuous Performance*.
2. Click the action menu on the achievement you want to request feedback for, and select *Request Feedback*. The *Request Feedback* dialog box appears.
3. In the *From* field, type and select the name of the employees you want to send the feedback request to.

> **Note**
>
> You can send the feedback request to one or more employees simultaneously. When you search for employees, their job titles appear beneath their names, to help you distinguish between employees with

> similar names. Even if you add multiple employees to the *From* field, individual requests are sent to each employee, so none of the employees sees who else received the same request.

4. A default message is available in the *Request Feedback* dialog box. You can either modify it or use it verbatim, and click *Send*.

Results

A confirmation message appears that indicates your feedback request has been successfully sent. If the e-mail notification for *Continuous Feedback Responded Request Notification* has been configured, you get an e-mail notification when feedback providers post their feedback comments.

Related Information

Achievements (Legacy) [page 124]
The Achievements View (Legacy) [page 125]
Configuring Role-Based Permissions

7.9 Using Legacy Continuous Performance Management on Mobile Apps

You can use the legacy version of Continuous Performance Management on your SAP SuccessFactors mobile application. Learn what is supported for Mobile Continuous Performance Management.

The following features are supported for the legacy version of Continuous Performance Management:

Activities

- Add an activity
- Edit and delete an activity
- Add an update on an activity
- View activities
- Meeting History
- Discussion topics in meeting view
- Capture a meeting
- Coaching

Achievements

- Achievements view
- Add an achievement

Feedback

- Request feedback
- Give feedback
- Respond to a feedback request
- View the feedback you received and sent, and feedback requests you sent
- Manager's access to activities, meetings, achievements, and feedback

Related Information

Configure Continuous Performance Management (Legacy) [page 93]
Creating Email Notifications (Legacy) [page 96]
Adding Reporting Permissions for Continuous Performance Management (Legacy) [page 97]
Enabling the Legacy Continuous Performance Management on Mobile Application [page 136]

7.9.1 Enabling the Legacy Continuous Performance Management on Mobile Application

Turn on the org chart and continuous performance options to enable mobile access for roles using role-based permissions.

Prerequisites

- You have downloaded the latest version of the SAP SuccessFactors mobile app from the Apple App Store or Google Play.
  Users of Android devices sold in Mainland China can download the SAP SuccessFactors mobile app from the Tencent Appstore.
- You have enabled Continuous Performance Management in the web application.

Context

You can enable Continuous Performance Management for your SAP SuccessFactors mobile application for iOS (version 13 and above) or Android (version 7.0 or above).

Procedure

1. Log on as an administrator and go to *Admin Center* > *Tools* > *Enable Mobile Features*.

The *Enable Mobile Features* tab on the *Mobile Settings* view is shown.
2. On the *Mobile Specific* section, under *Mobile Features*, select *Org Chart*, and on the *Confirmation* dialog box, choose*Turn On*.
3. on the *Modules* section, under *Talent*, select *Goals* and *Continuous Performance*, and on the *Confirmation* dialog box, choose *Turn On*.
4. Save your changes.

Related Information

Using Legacy Continuous Performance Management on Mobile Apps [page 135]

8 Appendix

8.1 Checks Performed by the Validation Tool in Continuous Performance Management

The validate tool on the *Admin Center* > *Continuous Performance Management Configuration* view performs various configuration and permission checks to ensure the smooth functioning of Continuous Performance Management.

Prerequisite Features

The validation tool checks the following options in *Provisioning* > *<Company>* > *Edit Company Settings*:

- *Enable Continuous Performance Management* must be selected.

  > **Note**
  >
  > You can also enable it using Admin Center, by selecting *Admin Center* > *Performance Management Feature Settings* > *Enable Continuous Performance Management*.

- *Enable Generic Objects* must be selected.
- *Role-based permissions* must be selected.
- *Disable OData API* must NOT be selected.

> **→ Remember**
>
> As a customer, you don't have access to Provisioning. To complete tasks in Provisioning, contact your implementation partner or Account Executive. For any non-implementation tasks, contact Product Support.

Continuous Performance Management OData APIs

The validation tool confirms the availability of OData APIs in your instance, for example:

- Activity
- Achievement
- ActivityFeedback
- AchievementFeedback
- ActivityStatus
- FeedbackFlag
- MeetingSnapshot
- ActivitySnapshot
- AchievementSnapshot
- CommentSnapshot
- OtherTopicSnapshot
- CoachingAdviceSnapshot
- GoalDetailSnapshot
- DevGoalDetailSnapshot
- GoalDetail
- OneOnOneMeeting
- OtherTopic
- OtherTopicFeedback
- OtherTopicStatus
- CoachingAdvice
- AchievementSupporter
- SupporterFeedback
- ContinuousPerformanceUserPermission
- SimpleGoal (Objective Management Suite)
- GoalPlanTemplate (Objective Management Suite)
- SimpleDevGoal (CDP Full Development Plan)
- DevGoalPlanTemplate (CDP Full Development Plan)
- User
- Feedback
- Recipient

> **Note**
>
> You can access the entire list of the OData APIs available in your instance by going to the *Admin Center* > *OData API Data Dictionary* page.

Continuous Performance Management Metadata Framework Entity Definitions

The validation tool verifies the following MDF entity definitions in your instance.

- ActivityStatus (isRBPSecured=false)
- Activity (isRBPSecured=true)
- ActivityAccessLog (isRBPSecured=false)
- ActivityFeedback (isRBPSecured=false)
- Achievement (isRBPSecured=true)
- AchievementFeedback (isRBPSecured=false)
- FeedbackFlag (isRBPSecured=false)
- ActivityPriority (isRBPSecured=false)
- ActivityState (isRBPSecured=false)
- GoalDetail (isRBPSecured=false)
- DevGoalDetail (isRBPSecured=false)
- OneOnOneMeeting (isRBPSecured=false)
- ActivitySnapshot (isRBPSecured=false)
- AchievementSnapshot (isRBPSecured=false)
- CommentSnapshot (isRBPSecured=false)
- GoalDetailSnapshot (isRBPSecured=false)
- DevGoalDetailSnapshot (isRBPSecured=false)
- MeetingSnapshot (isRBPSecured=false)
- CPMNotificationConfig (isRBPSecured=false)
- AchievementSupporter (isRBPSecured=false)
- SupporterFeedback (isRBPSecured=false)
- CoachingAdvice (isRBPSecured=false)
- CoachingAdviceSnapshot (isRBPSecured=false)
- OtherTopic (isRBPSecured=true)
- OtherTopicFeedback (isRBPSecured=false)
- OtherTopicStatus (isRBPSecured=false)
- OtherTopicSnapshot (isRBPSecured=false)
- Feedback (isRBPSecured=false)
- FeedbackRequest (isRBPSecured=false)
- Recipient (isRBPSecured=false)

Role-Based Permissions Configuration for Continuous Performance Management

The validation tool checks if the permissions required for using Continuous Performance Management have been assigned to one or more user roles in your instance. The validation checks for the following permissions:

- Access to Performance Management
- Access to Administrative Configuration page
- Company Info Access
- User Search

Initial Configurations

The validation tool checks the initial configuration settings for Continuous Performance Management.

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