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Using Continuous Performance Management

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1 Continuous Performance Management Overview

Continuous Performance Management provides two key feature groups: Continuous Performance and Continuous Feedback that you can access via their own entrances from the main navigation menu. [Continuous Performance](#) allows you to log and monitor activities that drive you toward achieving your goals. It also provides space for 1:1 meetings, fostering tailored guidance and support for your development. [Continuous Feedback](#) provides a platform for real-time and constructive interactions, enabling you to share insights and receive valuable input from your team to promote growth and improvement. This guide provides information of how to configure and how to use Continuous Performance Management.

Continuous Performance Management Major Features

Feature Group	Feature	Description
Continuous Performance	Channels	A channel is a one-on-one space between a channel owner and a channel participant. Within the channel, they can record the participant's activities and achievements towards goals, as well as hold 1:1 meetings. For more information, refer to Channels [page 44] .

Feature Group	Feature	Description
	Activities	Activities represent the actions being taken toward achieving goals. The things you're working on may or may not be related to a goal, but they can be recorded as activities. In the Activities view of a channel: • The View by Status tab provides an overview of the progress of your activities by grouping them into different status columns. • In the View by Goal tab, up to 100 lately updated performance goals or development goals can show. You can edit, delete, or create a performance goal within this tab. • While creating and editing an activity, associate it with a status that reflects your current progress. You can also link it to a performance or development goal. A performance or development goal created right from the activity are automatically associated with it. • You can also request feedback on your activities. For more information, refer to Activities View [page 52].

Feature Group	Feature	Description
	Achievements	You can label a completed activity as an achievement, though if the activity is deleted, the achievement is deleted. When you create an achievement, a completed activity is automatically created to allow continued integration with other modules. In the Achievements view of a channel: • You have a summary of the numbers of things you've achieved in a month, year, and up to now. • Achievements can be sorted by goals and filtered by date. You can edit and delete the achievements. • In either Performance Goals or Development Goals tab, up to 100 lately modified goals can be displayed. For more information, refer to Achievements View [page 60].
	Link activities and achievements to goals	Benefiting from the integration between Continuous Performance Management and Goal Management, activities and achievements can be linked to performance and development goals.

Feature Group	Feature	Description
	Meeting	In the Meeting view of a channel, users see a list of all current activities. Users can sort this list by status or by goal. Up to 300 activities and 100 performance or development goals can show. 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. 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, users can keep their private notes in the system. They can refer to those notes in any subsequent 1:1 meeting. Once the meeting is complete, either of the participants can archive the meeting content into Meeting History, where they can revisit previous meetings. In a meeting history, up to 300 activities and 100 performance or development goals can show. If you archive a meeting before an activity attached to the meeting is completed, the meeting history records the incomplete state of the activity as it is. After the activity is completed, users can capture the meeting again. The second meeting history updates the status of the activity without overwriting or deleting the status of the activity in the earlier record. For more information, refer to Meeting View [page 62].

Feature Group	Feature	Description
Continuous Feedback	Give feedback	You can request feedback on yourself and on behalf of your direct reports and give feedback to others. - When requesting feedback, you're provided with a list of five suggested users as the recipient, who are randomly selected from the feedback receiver's manager, matrix managers and peers. - When giving feedback, the suggested users are randomly selected from your peers. Note <i>Give Feedback</i> and <i>Request Feedback</i> in Home Page <i>Quick Actions</i> doesn't provide the list of suggested users. You can select one to ten users as the request recipients. Even if you add multiple users, individual messages are sent to each one. No one can tell who else receive the same message. Note You can select only one user when you <i>Give Feedback</i> or <i>Request Feedback</i> through Home Page <i>Quick Actions</i>. After the selection, you enter a topic to summarize what the feedback is for. Then, you can use the preset three questions in your system's default language or modify them to align with your specific need. At least one question is needed. Note Administrators can change the system-preset questions in each locale through <i>Manage Languages</i>. For more information, refer to Continuous Feedback [page 66].
	Request feedback	

Feature Group	Feature	Description
Reporting	Reporting	When provided the role-based permission, a user can create reports as part of SAP SuccessFactors Reporting and Analytics. Story reports can be created for entities within Continuous Performance Management.
Email Notifications	Receive email notifications	Receiving and responding to feedback and feedback requests. Receiving notifications on activity updates from a manager. Receiving or requesting meeting invitations. For more information, refer to Continuous Performance Management Email Notifications [page 78] .
Mobile Support	Access Continuous Performance Management via mobile apps	Users can access Continuous Performance Management through mobile apps.
API	Continuous Feedback OData v4 API to support integrations and enhancements	The OData v4 API for Continuous Feedback is available to support third-party integrations and extensions for Continuous Performance Management (CPM). Information about this API and use cases is available through the SAP Business Acceleration Hub. See OData v4 API for Continuous Feedback on the SAP Business Accelerator Hub .
	Continuous Performance Management REST APIs to support Activities and Achievements	Public REST APIs for Activities and Achievements are available to support third-party integrations and extensions for Continuous Performance Management (CPM). These APIs replace the legacy version OData v2 APIs. Information about the APIs and use cases is available through the SAP Business Accelerator Hub. See REST APIs for Continuous Performance Management Activities on the SAP Business Accelerator Hub .

Continuous Performance Management Field Character Limits

Module Page	Field	Maximum Length
Continuous Performance	Channel invitation note	4000 characters
	Activity name	4000 characters
	Activity comment (in Updates section of an activity details page)	4000 characters
	Achievement name	4000 characters

Module Page	Field	Maximum Length
	Meeting discussion topic name	4000 characters
	Meeting note	2000 characters (including HTML characters)
Continuous Feedback	Feedback topic name	500 characters
	Feedback topic description	4000 characters
	Feedback question	250 characters
	Feedback answer	4000 characters

1.1 Continuous Performance Management Differences for Mobile

Continuous Performance Management supports the same features on SAP SuccessFactors Web and Mobile applications, but a few Continuous Performance Management features aren't supported on mobile devices.

Features Not Currently Supported on Mobile Application

- Rich text editor
- Configurable default view for Continuous Performance (The [Activities](#) screen is always the default landing view)
- Enhanced achievement experience (The [Activities](#) screen is read-only)
- Linking activities to feedback requests
- AI-assisted writing tool for Continuous Performance fields
- Editing discussion topics and meeting notes in meeting history

Related Information

[SAP SuccessFactors Mobile product page](#)

1.2 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 Getting Started with 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.

Sequence	Menu Path	Comments	Links
1. Enabling Continuous Performance Management in Provisioning	Checkbox in Provisioning, Enable <i>Continuous Performance Management</i> – requires "Enable Generic Objects", "Role-based Permission (This will disable Administrative Domains)" and "Enable the Attachment Manager" —	Note Skip this step if you choose to enable Continuous Performance Management from the <i>Admin Center</i>. → 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 Technical Support.	
2. Enabling Continuous Performance Management from Admin Center	▶ <i>Admin Center</i> ▶ <i>Performance Management</i> ▶ <i>Feature Settings</i> ▶ <i>Enable Continuous Performance Management</i> ▶	If Continuous Performance Management was already enabled in Provisioning, you can skip this step.	Enabling Continuous Performance Management from the Admin Center [page 14]
3. Creating Initial Administrator Access	▶ <i>Admin Center</i> ▶ <i>Manage Permission Roles</i> ▶	You create the initial administrator to complete the implementation.	
4. Configuring the Default View and the Activity Status Labels for <i>Continuous Performance</i>	▶ <i>Admin Center</i> ▶ <i>Continuous Performance Management Configuration</i> ▶	Choose the default setting and modify the Activity Status Label settings to your requirements.	Enabling Activities or Achievements as the

Sequence	Menu Path	Comments	Links
			Default View for Continuous Performance [page 22] Adding Activity Status Labels to Continuous Performance Management [page 24]
5. Configuring the Feature Configuration section	Admin Center Continuous Performance Management Configuration	You enable the features for your requirements.	Enabling Features in Continuous Performance Management [page 27]
6. Validating the Configuration of Continuous Performance Management	Admin Center Continuous Performance Management Configuration	After completing the configuration settings, you run a Validate check to ensure that there are no errors.	Validating the Configuration of Continuous Performance Management [page 39]
7. Managing Role-Based Permissions	Admin Center > Manage Permission Roles	Enable Continuous Performance Management-related permissions for user roles and administrator roles.	Role-Based Permissions for Continuous Performance Management [page 15]
8. Integrating with Other Modules - Goals Management	Admin Center > Manage Templates > Goal Plan	Select the default plans and templates and enable settings to link to Continuous Performance Management to other modules.	Integrating with Goal Management [page 89]
9. Integrating with Other Modules - Development Plan	Admin Center > Manage Templates > Development	Select the goal plans or templates and enable settings to link to Continuous Performance Management to other modules.	Integrating with the Career Development Plan [page 93]
10. Integrating with Other Modules - Performance Management	Admin Center > Form Template Settings	Select the templates and enable settings to link to Continuous Performance Management to other modules.	Integrating with Performance Management [page 91]
11. Integrating with Other Modules - Calibration	Admin Center > Manage Calibration Templates	Select the templates and enable settings to link to Continuous Performance Management to other modules.	Integrating with Calibration [page 95]
12. Integrating 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	Integrating with Compensation [page 94]
13. Configuring Email Notifications	Admin Center > Email Notification Template Settings	Configure and enable relevant email notifications for Continuous Performance Management.	Continuous Performance Management Email Notifications [page 78]
14. Mobile Configuration		You must activate the mobile application to use Continuous	Activating the Mobile Application

Sequence	Menu Path	Comments	Links
		Performance Management functionality on Mobile Apps.	

2.1 Enabling Continuous Performance Management from the Admin Center

You can enable Continuous Performance Management (CPM) in the Admin Center.

Prerequisites

- You have the license for Performance Management and Goal Management.
- You've created role-based permission access.

Note

Enabling role-based permissions for Continuous Performance Management disables Administrative domains.

- You've enabled *Intelligent Event Services*.
To send an email notification for receiving feedback or responses to feedback requests, enable Intelligent Services for your instance. By default, email notification uses the Intelligent Services event framework to recognize the sending of feedback.

Procedure

- Sign on as an administrator and go to ► [Admin Center](#) ► [Tools](#) ► [Performance Management Feature Settings](#) ►.
The system opens the [Performance Management Feature Settings](#) view.
- Check the box for [Enable Continuous Performance Management](#),
- Choose [Save](#).

Results

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

2.2 Role-Based Permissions for Continuous Performance Management

Role-based permissions are required to use and administer Continuous Performance Management. They determine a role's access right to certain features and data.

The following list isn't all of the permissions that users or administrators need to use Continuous Performance Management and the functionality that's integrated with other modules. For a full list, refer to [List of Role-Based Permissions](#) and filter the **Solution** column by [Continuous Performance Management](#).

Who is the permission for?	Permission Location	Permission Name	Results and Comments
Administrators 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 .	This permission allows the users to search for others when requesting feedback.
Note These employee fields could be configured with different labels for your organization. Refer to your employee data model for the correct field labels.			
Administrators	Manage Continuous Performance Management	Admin Access to all Continuous Performance Management Data	Allows users to access Continuous Performance Management data in Story reports for the employees that are included in their target population. This permission is also required for Data Protection Officers (DPO) for creating and running a Data Subject Information report for given subject users.
Note This is an Administrator permission, which is bound by target population.			

Who is the permission for?	Permission Location	Permission Name	Results and Comments
Administrators	Manage Continuous Performance Management	Admin Access to Delete Continuous Feedback Page	We recommend creating a specific and separate administrator role for this permission.
Administrators Users	Continuous Performance Management	Activity	To grant this role permission to <i>upload and download attachments</i>, select the following: Activity Actions: View, Edit To grant this role permission to <i>only download attachments</i>, select: Activity Actions: View Note The Field Level Overrides permissions aren't supported for Continuous Performance Management.
Administrators Users	Continuous Performance Management	Achievement	To grant this role permission to view, add, and edit achievements, select: Achievement Actions: View, Edit To grant this role permission to <i>only view achievements</i>, select: Achievement Actions: View Note The Field Level Overrides permissions aren't supported for Continuous Performance Management.

Who is the permission for?	Permission Location	Permission Name	Results and Comments
Administrators Users	Continuous Performance Management	Discussion Topic	To grant this role permission to view, add, and edit discussion topics, select: Discussion Topic Actions: View, Edit To grant this role permission to only view discussion topics, select: Discussion Topic Actions: View Note The Field Level Overrides permissions aren't supported for Continuous Performance Management.
Administrators Users	Goals	Access to Continuous Performance Management Data	The <i>Access to Continuous Performance Management Data</i> 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.
Administrators Users	General User Permissions	Organization Chart Navigation Permission User Search Company Info Access	For Continuous Performance Management, you define target populations to apply to these permissions.

Who is the permission for?	Permission Location	Permission Name	Results and Comments
Administrators Users	Continuous Performance Management User Permission	Access Continuous Performance Data Access Continuous Performance Page Access Continuous Feedback Data Access Continuous Feedback Page 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.
Administrators Users	Metadata Framework	Access to nonsecured objects	📌 Note Continuous Performance Management requires the <i>Access to nonsecured objects</i> 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 main navigation menu.
Administrators Users	Reports Permission	Report Center Create Story	Providing permission to the Report Center allows access to reporting. To create CPM-specific reports, the Create Story permission allows Story type reports.
Administrators	Manage Continuous Performance Management	Delete Channels	Allows admins to access the Delete Channels admin page and delete certain channels on behalf of the channel owners.

Who is the permission for?	Permission Location	Permission Name	Results and Comments
Users	AI Access	Assisted Skill Recommendations Using Continuous Performance Management Data	Allows users to receive AI-assisted skill recommendations in their Growth Portfolios based on their data of activities, achievements, and feedback in Continuous Performance Management. Note This permission is only available when you've enabled <i>Assisted Skill Recommendations Using Continuous Performance Management Data</i> in <i>AI Services Administration</i> admin tool. See Integrating with Talent Intelligence Hub [page 96] for more information.
Users	Continuous Performance Management User Permission	Edit Discussion Topics and Meeting Notes in Meeting History	Allows users to update existing discussion topics and personal meeting notes that are archived in meeting history. They however still can't add or delete discussion topics.

Related Information

[List of Role-Based Permissions](#)
[Role-Based Permissions](#)

2.2.1 Separate Permissions that Control Access to Continuous Performance and Continuous Feedback

Continuous Performance Management comprises two feature groups: **Continuous Performance** and **Continuous Feedback**. They are accessed via separate entrances on the system's main navigation menu. Based on your company needs, you as an administrator can use role-based permissions to allow users to engage with both or either of them.

Specifically, to enable user to access Continuous Feedback, make sure the below permissions under *Continuous Performance Management User Permission* are granted, after you've selected *Enable Continuous Feedback* in the *Continuous Performance Management Configuration* admin tool.

Permission	Description
Access Continuous Feedback Data	Allow a role to access Continuous Feedback data
Access Continuous Feedback Page	Allow a role to access Continuous Feedback page
Give Continuous Feedback	Allow a role to give feedback to others that are within the role's target population
Request feedback from others	Allow a role to send feedback requests to others that are included in the role's target population
(Optional) Limit about whom feedback can be requested	Allow a role to request feedback on behalf of only those within the role's defined target population

For the full functionality of Continuous Performance Management, users need more than the above permissions. For more information, see [Role-Based Permissions for Continuous Performance Management \[page 15\]](#).

Related Information

[Role-Based Permissions for Continuous Performance Management \[page 15\]](#)

2.2.2 Permissions that Control the Visibility of Actions for Performance Goals in Continuous Performance Activities View

For each **performance goal** displayed in *Activities* view in *Continuous Performance* page, a user can perform actions based on their permission level.

Prerequisites

- The latest version of Goal Management is enabled.
- Users have an active Goal Plan in Goal Management.
- Users have the [User Permissions > Continuous Performance Management User Permission > Access Continuous Performance Data](#) and [Access Continuous Performance Page](#) permissions.
- Users have the *View* and *Edit* permissions under [User Permissions > Continuous Performance Management > Activity](#).
- Users have the [User Permissions > Goals > Access to Continuous Performance Management Data](#) permission and the [User Permissions > Goals > Goal Plan Permissions](#) for their goal plans.

Context

Users have more control over their performance goals by creating, editing, or deleting goals directly in [Continuous Performance](#) page. When a goal isn't created from Continuous Performance Management, but linked from Goal Management, any actions available to a user in the goal column in [Continuous Performance Activities](#) view are based on the user's permissions setup in Goal Management. When the user takes action in [Continuous Performance](#), the changes are automatically reflected in the [Goals](#) page.

Actions and Permissions

The available actions for a performance goal in the [Activities](#) view is determined by your permission settings for Goal Management. Goal Management uses **field permissions** (read and write) and **action permissions** (delete) for each goal plan template in XML only. For more information about managing Goal Management permissions, see the [Related Links](#).

Dependent on permission configurations, there are three levels of access for action buttons in a performance goal column in the [Activities](#) view:

Action Permitted	Icon Shown	Comments
Edit Only	 Edit	A user only has permission to read and write the goal.
Delete Only	 Delete	A user only has permission to delete the goal. 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 Performance Goals column.
Edit and Delete	•• More and the dropdown provides choices of Edit Goal and Delete Goal .	When a user has all these field and action permissions, they can edit and delete the goal.

Note

For the legacy version of Goal Management, no matter what permissions the user has, [Edit](#) or [Delete](#) buttons won't be shown for Group or Team goals in [Continuous Performance](#) page.

Related Information

[Implementing and Managing Goal Management - Field Permissions](#)
[Implementing and Managing Goal Management - Action Permissions](#)

2.3 Enabling Activities or Achievements as the Default View for Continuous Performance

An administrator can select the [Activities View](#) or [Achievements View](#) as the initial view for [Continuous Performance](#).

Prerequisites

- Continuous Performance Management is enabled.
- You have administrator permission to configure Continuous Performance Management settings.

Context

[Continuous Performance](#) has the [Activities](#) view as the default landing page. As an administrator, you can instead change to [Achievements](#) for all users.

Procedure

1. Sign on as an administrator and go to ► [Admin Center](#) ► [Tools](#) ► [Continuous Performance Management](#) ►.
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 Continuous Performance landing page. Users must have at least permissions to view Activities to see this page.
Achievements View	This selection makes the Achievements view the default landing page for all users. Users must have at least the View permission for both Achievements and Activities .

3. Choose [Save Configuration](#).

Related Information

[Allowing an Enhanced Achievement Experience \[page 61\]](#)

2.4 Setting Landing Tab for Activities View

Configure the default tab that users land on when they access the [Activities](#) page.

Prerequisites

To configure this setting, your instance must have at least one goal type enabled (either performance goals or development goals). If your instance has neither type of goals enabled, the [Activities](#) page only displays the [View by Status](#) tab, and this configuration is not necessary.

Context

By default, users land on the [View by Status](#) tab when accessing the [Activities](#) page. You can change this default to align with organizational priorities, such as having users land directly on the [View by Performance Goal](#) or [View by Development Goal](#) tab. This configuration applies to all users in your instance.

Procedure

1. Go to the [Continuous Performance Management Configuration](#) page.
2. Locate the [Default Tab for Activities View](#) setting.
3. Select one of the following options:
 - [View by Status](#). This is the default option.
 - [View by Goal](#): Users land on the [View by Performance Goal](#) tab. If performance goals are not enabled in your instance, users land on the [View by Development Goal](#) tab instead.
4. A message appears to confirm that the change has been saved.

Results

The [Activities](#) page now opens to the configured default tab for all users in your instance.

2.5 Adding Activity Status Labels to Continuous Performance Management

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

Context

The activity status specifies the lifecycle that an activity is in, so that users can more effectively.

A set of activity status names and labels is provided and can be customized. [Activities Status](#) allows tracking the stage of an activity. These status levels act as a Kanban board in the [Activities](#) view. By grouping activities according to their status level, you can see at a glance your current work and the progress you are making toward completion.

You can remove all the existing activity status labels and create new status labels that align to your business process. However, when a user adds a new activity, the system requires a status value. So, either add or retain at least one activity status value for Continuous Performance Management (CPM). For example, if you're only using CPM to track achievements, create a single activity status label.

Note

You're required to select one [Activity Status Label](#) as the [Default](#). This selection 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 four 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. Sign on as an administrator and go to the ► [Admin Center](#) ► [Tools](#) ► [Continuous Performance Management Configuration](#) .
The [Continuous Performance Management Configuration](#) view is shown.
2. Go to the [Activities Status Label](#) section to define the activity status.
To add an additional status label, choose [+ Create New Activity Status](#) and then define your choices as described in the following table,

Column Name	Comment
Select	When selecting an activity status row, a Re-Order Activity Status option is shown at the top of the table. Use the up or down arrows to change the order of the activity status in the table. Changing the order in the table controls the order that the status values appear in the Activity Status dropdown menu.
Activity Status Label	Enter a meaningful activity status label name. Note To change the name for the activity status, you choose the field and make your changes. Select Enter on your keyboard to save the change.
Localize	Choosing Localize opens a dialog box to add text for other languages or label display options for the name of the activity status label.
Status Color	Choose the  color palette to select a color for the status. Note 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.
Default	Select one label as Default to set it as the default status for newly created activities.
Prompt Achievement Creation	Select Prompt Achievement Creation for one status label. When a user changes their activity status to this selection, the user is prompted to create an achievement.
Clear after Capturing Meeting	Allowing activities in certain statuses to be cleared from the meeting page and the activity overview page after they are captured into meeting history. Note Typically, users clear the completed activities after a meeting is closed and saved. The completed activities are then only archived in meeting history. However, you may choose not to clear any of the activities. When not cleared, these activities remain visible on both the meeting page and the activity overview page.
Delete icon	Choosing  Delete removes the status label row. When you delete, a By deleting this activity status value, it deletes the status for all users. Are you sure you want to continue? dialog box is shown. Confirm the Warning dialog box by choosing Delete .

Column Name	Comment
	 Note When you delete a status value that was already being used, all the past activities that used that status retains the value. Also, after you delete an activity status value that is already used, the label continues to appear in the activity status list, but the label can't be selected.
Save	When you've created a new activity status label, a  Save selection is shown next to the delete icon. Choose Save to add the new row to the table.
+ Create New Activity Status	Selecting + Create a New Activity Status adds a new row to the bottom of the table. Entering a meaningful Activity Status Label name and a  selection is shown next to the delete icon. Choose Save to add the new row to the table. Once saved, the Select column is activated for the row to re-order the label in the table, if you choose.

Results

You've created the activity status labels for Continuous Performance Management.

Next Steps

The next step is to select the **Feature Configuration** options for Continuous Performance Management.

2.5.1 Color Codes for Activity Status on the SuccessFactors Mobile App for iOS

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

2.6 Enabling Features in Continuous Performance Management

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

Prerequisites

You've enabled 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 [Role-Based Permissions for Continuous Performance Management \[page 15\]](#).

Procedure

1. Sign on as an administrator and go to ► [Admin Center](#) ► [Tools](#) ► [Continuous Performance Management Configuration](#) ►.
2. On the [Feature Configuration](#) section, enable or disable a feature by either selecting or clearing the feature checkbox.

Option	Description
Enable "Discussion Topic"	Allows employees and managers to create and track topics they want to discuss together. Note The Discussion Topic feature is available for Continuous Performance Management role-based permissions only when you've selected Enable "Discussion Topic".
Enable Meeting Notes	Allow employees and managers to enable a note taking feature in a 1:1 meeting that is saved to the Meeting History.
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 that 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 the feature Continuous Performance's functionality to be used by roles other than the manager and their direct reports. A user can invite another user to a 1:1 channel and create activities, achievements and hold meetings together. To enable this feature, you must configure the respective target population permissions.
Enable matrix managers and matrix reports to be shown as people selections for Channels by default	Allows automatic creation of channels between a matrix manager and a matrix report in the Channels list of Continuous Performance Management. If they already have a channel, no additional ones will be created for them.

Option	Description
<i>Enable Attachments on Activities</i>	Allows users to add attachments on activities for which they have Edit Activity permission. Anyone with access to view that activity is able to view and download the attachment.
<i>Hide the meeting histories of previous managers from the new manager</i>	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.
<i>Automatically Hide Prior Feedback Requested or Given by a Former Manager from the New Manager</i>	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 by the former manager without the employee's authorization. This option supports the data privacy and protection concerns by automating the process of hiding feedback. • 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. When a manager transfer occurs and a feature switch is enabled: • The feedback given by the former manager and requested on the 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 the former manager and feedback requested on the employee's behalf. • The employee may delete feedback given by a former manager. • The employee may delete the feedback requested on the 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 the 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.
<i>Enable Cross-Channel Activity Sharing</i>	Allows users to share their activities across multiple channels that they participate in to enhance collaboration and transparency.
<i>Enable Managers to View All Feedback for Direct Reports</i>	Once enabled, all feedback that employees received becomes visible to their direct managers, including feedback previously hidden from them. The button to delete feedback and the switch to control whether feedback is visible to managers are no longer available to users. Note With this feature enabled, the following two are no longer configurable: • Automatically Hide Prior Feedback Requested or Given by Former Manager from the New Manager

Option	Description
	Disable Deleting Feedback
<i>Enable User-Controlled Goal Visibility in Feedback Requests</i>	Allows users requesting feedback on an activity to choose whether request recipients can view only the goals they already have access to, or all goals linked to the activity. By default, this feature is disabled, and the system shows request recipients only the goals they already have permission to view. If enabled, users requesting feedback should choose between two options: <i>Show only permitted linked goals</i> (default selection) <i>Show all linked goals</i> ⚠ Caution Enable this feature only if your organization is comfortable allowing employees to manage the confidentiality of their own goals, as this may expose information beyond standard permissions.
<i>Include Inactive User Data in Story Reports</i>	If you want to include both active and inactive users' Continuous Performance Management data in Story reports, make sure this feature is enabled.

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.

2.6.1 Enabling Outlook Integration with Continuous Performance Management

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

Prerequisites

- Continuous Performance Management (CPM) is enabled.
- Mapping SAP SuccessFactors user attributes to Microsoft Active Directory is set up.
- Integration: You have your Outlook Exchange administrator and other internal technical support organized to configure and upload the Outlook Add-in.

Permissions

- The **User** > *Continuous Performance User Permission* > *Access to Continuous Feedback* is given to employees using this feature.

- [User](#) > [Continuous Performance User Permission](#) > [Give Continuous Feedback](#) permission is given to employees using this feature.

Note

Intended recipients of the feedback must be within the target population of the employee's [Feedback](#) permissions, and the [User Search](#) permission.

Authentication

- Single sign-on integrations aren't supported. Even if Identify Authentication Service is enabled, single sign-on isn't yet supported with this feature.
- The authentication for users in Outlook is their SuccessFactors username and password. Once authenticated, the users stay signed on for 7 days before being prompted for their username/password.

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.

- This feature is designed for employees to send feedback through Outlook. It isn't possible to [Request Feedback](#) using this add-in, only to provide feedback to others.
- The add-in can't pull content from an email to populate the [Give Feedback](#) fields.
- The add-in isn't supported on the Mobile Outlook application.

Note

It isn't possible to amend the SuccessFactors image on the [Give Feedback](#) add-in on the Outlook ribbon bar.

Procedure

1. Sign on as an administrator and go to [Admin Center](#) > [Tools](#) > [Continuous Performance Management Configuration Configuration](#).

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](#).

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.

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.

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.

Note

User target population must have feedback permission.

7. When configuration is completed, enable the change in Outlook for employees.

Note

Single sign-on integrations aren't supported. Authentication by users with their SAP SuccessFactors username and password is 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.

2.6.2 Enabling Add Attachments to Activities

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

Prerequisites

Users who can upload, download and delete attachments to activities should have had the **View** and **Edit** permissions to activities under ► [User Permissions](#) ► [Continuous Performance Management](#) ►. Users who only have the permission to view activities can't upload and delete attachments.

Context

Continuous Performance Management uses **Activity** 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.

Supported Behaviors

- A user can add an attachment to an activity created by themselves or on their behalf (either by their manager or a channel owner).
- A user can see that an activity has an attachment from the [Activities](#) kanban board by attachment icon.
- A user can download and delete attachments.
- A user can view and download attachments from [Meeting](#) and [Meeting History](#).
- Attachments can't be added or deleted from an [Activity](#) in a [Meeting History](#) because they have been archived.

Note

The [Create Activity](#) dialog box in the latest version of Goal Management and the [Create Activity](#) quick action in the Home Page do not provide the functionality of adding attachments.

→ Remember

It isn't possible to build a report on attachments for [Activities](#) in Continuous Performance Management.

Supported File Types

The following file types are supported for attachments:

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

Supported File Size

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 Technical Support.

Procedure

1. Go to ► [Admin Center](#) ► [Continuous Performance Management Configuration](#) ►.
2. Scroll down to the **Feature Configuration** section and select the [Enable Attachments on Activities](#) check-box.
3. Choose [Save Configuration](#) to save your changes.

Next Steps

Users with appropriate permissions can add an attachment to an activity.

1. Sign on as a user and go to [Continuous Performance](#).
2. Select a channel to add the activity and choose [Create Activity](#) to trigger a dialog box.
3. In the [Attachments](#) section, choose [Add](#) and then select a file from your system's document browser.
4. Fill out other required fields in the dialog box.
5. Choose [Save](#) to upload the file and save all other information.

Result: The file name, size, added on date, and the name of user who added the file are shown in the attachment area.

2.6.3 Hiding the Meeting History from New Managers When Employees Changes Managers

An administrator can enable a setting to automatically hide the meeting histories between a direct report and their previous manager from the new manager.

Prerequisites

- Continuous Performance Management is enabled.
- You have the ► [Administrator Permissions](#) ► [Manage Continuous Performance Management](#) ► [Access to Administrative Configuration page](#) ► permission.

Context

This option allows the meeting histories between a direct report and their previous manager to be hidden from their new manager. This feature supports data privacy and protection.

When this feature is enabled:

- Employees are shown all meeting histories with their current and previous direct managers.
- Managers are shown only their own meeting histories with their current direct reports.

When this feature is NOT enabled:

- The meeting histories between an employee and their previous direct manager are visible to the employee's new direct manager.

Procedure

1. Go to ► [Admin Center](#) ► [Continuous Performance Management Configuration](#) ►.
2. Scroll down to the [Feature Configuration](#) section and select the [Hide the meeting histories of previous managers from the new manager](#) checkbox.
3. Choose [Save Configuration](#).

Results

The meeting history between an employee and their previous direct manager are automatically hidden from their new direct manager.

Related Information

[Hiding Feedback Requested or Provided by Former Manager from Current Manager \[page 36\]](#)

2.6.4 Hiding Feedback Requested or Provided by Former Manager from Current Manager

As an administrator, you can configure whether feedback from or requested by an employee's former manager are automatically hidden from their current manager.

Prerequisites

- Continuous Performance Management is enabled and configured.
- You've selected [Enable Continuous Feedback](#) on [Continuous Performance Management Configuration](#) admin tool.

Overview

While Continuous Performance Management provides end users with options to manually hide or delete feedback from or requested by their former managers, administrators have the option to centrally enable automatically hiding feedback given or requested by previous managers from current managers. The setting [Automatically Hide Prior Feedback Requested or Given by Former Manager from the New Manager](#) is available on the [Continuous Performance Management Configuration](#) page.

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 Setting Not Selected)

There are two types of feedback associated with a manager.

- Feedback from the manager.
- 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 have two options for feedback provided by the previous manager:

- On the feedback details page, manually set the [Make visible to my manager](#) switch to control the current manager's visibility into this feedback.
- On the feedback details page, choose the [Delete Feedback](#) button to permanently delete the feedback.

⚠ Caution

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.

The employee can't hide or delete feedback requested by the previous manager. On the details page of these feedback, the [Delete Feedback](#) button isn't shown and [Make visible to my manager](#) button is locked on [Yes](#).

Feedback Actions by Default

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

Automatically Hiding Prior Feedback Requested or Given by Former Manager from the New Manager (Feature Setting Enabled)

When the setting [Automatically Hide Prior Feedback Requested or Given by Former Manager from the New Manager](#) is enabled, all the feedback from the previous manager or provided on the behalf of the previous manager is by default 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 previous manager as well.

On the details page of feedback either requested or given by the previous manager, the [Make visible to my manager](#) switch is automatically set to [No](#). The employee has the option to manually switch to [Yes](#). The employee can choose the [Delete Feedback](#) button to permanently delete the feedback.

⚠ Caution

The automatic changes only apply to manager transfers that occur after the feature is enabled. No retroactive changes are possible.

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 the previous manager	Automatically Hidden (with manual option to make visible)	Yes (as manual option)
Feedback provided by another employee on behalf of the previous 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.

Continuous Feedback ▼

Feedback / Feedback Details

Feedback Details

**Alison Mahoney** 
Service Center Manager UK (Position90...

Feedback given by manager
Feedback received on March 23, 2023

Make visible to my manager:
No ☐

Linked Activity:

Select an activity to link. ▼

Delete Feedback

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.

Related Information

[Enabling Features for Continuous Performance Management \[page 27\]](#)

2.7 Validating the Configuration of Continuous Performance Management

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 enabled Continuous Performance Management.
- 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](#) ► [Tools](#) ► [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.
OData API	The Continuous Performance Management OData APIs are available. 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 <i>aren't</i> 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. 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.

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](#).

Note

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

2.8 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 Technical Support so that we can address the issue in future builds.

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](#).

Related Information

[Manage Languages](#)

[Managing UI Labels in HCM suite](#)

2.9 Impact of Multiple Employment on Continuous Performance Management

For an employee with multiple employments because of either a Global Assignment or Concurrent Employment, you should take note of the effect on the system behavior of Continuous Performance Management.

The two most common types of multiple employment in Employee Central are:

- **Global Assignment:** Is used for an employee who temporarily works in a different country/region. The employee is assigned a home employment and a host employment.
- **Concurrent Employment:** Is used for an employee who has secondary employment in the same company. An employee can have one primary employment and multiple secondary employments in the system.

Note

A global assignment and concurrent employment can't be applied to the same employee at the same time.

Because multiple employment includes different reporting relationships, this has an impact on the system behavior of Continuous Performance Management.

System Behavior	Impact
With Global Assignment, any Continuous Performance Management feedback given or received by the employee is specific to the home or host assignment. A host assignment includes a unique user ID. Any feedback given or received is from that user ID and is specific to the assignment.	You can't transfer feedback from a host assignment to a home assignment. Only after the host assignment ends and becomes inactive, feedback given to this employment can be transferred to an active assignment, for example, the current home assignment.
With Global Assignment, managers can only view the employee's Continuous Performance Management feedback given within their assignment area.	For Global Assignments • A home assignment manager can only view the home assignment feedback given to the employee. • A host assignment manager can only view the host assignment feedback given to the employee.

When one of an employee's employments ends and becomes inactive, you can transfer its Continuous Performance Management data to the employee's active employment. This allows the employee to continue accessing and managing their historical records using their current employment in both the web and mobile applications. For more information, refer to [Transferring Individual Talent Data from Inactive to Active Employment](#).

3 Continuous Performance

Continuous Performance provides a structured space for recording, tracking, and discussing performance and development within 1:1 channels. In a channel, the two channel members can collaboratively record activities, achievements, and meetings, forming a complete overview of the progress towards goals.

Continuous Performance and Multiple Roles

Organizations are adapting and responding to changing conditions. They need a platform to allow for on-going conversations between roles that go beyond the traditional manager-employee relationship while managing and tracking performance. All roles within the organization can use Continuous Performance feature to manage activities, track achievements, and support 1:1 meetings.

📘 Note

You should enable the [Enable Multiple Role Support](#) setting in [Continuous Performance Management Configuration](#) admin tool and use the **latest** version of Goal Management to make full use of the multiple role support functionality in Continuous Performance.

When adding activities from the Goal Plan page, please be aware of the following:

- ONLY the employee and their line manager are able to add activities from the Goal Plan.
- When an employee has a 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.

[Channels \[page 44\]](#)

Continuous Performance Management uses [Channels](#) as a way for people to share and discuss activities and achievements towards goals, as well as hold 1:1 meetings.

[Activities View \[page 52\]](#)

Activities are actions taken toward achieving goals. What you are working on may or may not be related to a goal, though these actions can be captured as activities. In the [Activities](#) view of the selected channel, the channel owner and participant can manage activities created within this channel and activities shared from other channels that the **participant** needs to complete.

[Achievements View \[page 60\]](#)

With the [Achievements](#) view, a channel owner and the participant can see a summary of the achievements that the participant has made. You can filter them by performance goal, development goal, or time frame.

[Meeting View \[page 62\]](#)

[Continuous Performance](#) includes a dedicated meeting view that supports 1:1 meetings between a channel owner and a channel participant.

3.1 Channels

Continuous Performance Management uses [Channels](#) as a way for people to share and discuss activities and achievements towards goals, as well as hold 1:1 meetings.

Overview

A channel is a shared space for two people, an owner and a participant. The **channel owner**, often a manager or mentor, is the user who initiates the channel. The **channel participant** is the user who accepts the channel invitation. Within this channel, the two members can collaboratively record, track progress, and hold meetings concerning the **participant's** activities and achievements.

By default, managers have channels automatically created between them and all their direct reports, where the managers serve as the channel owners and the employees as the participants. With the option [Enable Multiple Role Support](#) selected in the [Continuous Performance Management Configuration](#) tool, channels can be created with someone outside your traditional management hierarchy. In a user's [Channels](#) list, dependent on configuration and permission settings, channels can fall into up to six categories.

Category	Definition	Note
Manager	Lists the channel between the user and their manager	By default it shows when the user has a manager
Matrix Managers	Lists channels between the user and their matrix managers	Shows when the user has a matrix manager and the setting Enable matrix managers and matrix reports to be shown as people selections for Channels by default is enabled in the Continuous Performance Management Configuration admin tool.
Direct Reports	Lists channels between the user and their direct reports	By default it shows when the user has a direct report
Matrix Reports	Lists channels between the user and their matrix reports	Shows when the user has a matrix report and the setting Enable matrix managers and matrix reports to be shown as people selections for Channels by default is enabled in the Continuous Performance Management Configuration admin tool.
Other Channels	Lists channels not grouped under the former categories and the user's sent channel invitations	Users can move these channels to Hidden Channels by selecting the  (Hide channel) icon on the list item. Another way is after selecting a channel, in its Activities view or Achievements view, select the Hide Channel button on the header.

Category	Definition	Note
Hidden Channels	Lists channels that need to be hidden	Users can move these channels back to Other Channels by selecting the  (Show channel) icon on the list item. Another way is after selecting a channel, in its Activities view or Achievements view, select the Show Channel button on the header.

Channel Statuses for Other Channels and Hidden Channels

Users can invite people outside the traditional management hierarchy to start 1:1 channels. These channels initiated by users themselves appear under *Other Channels* or *Hidden Channels* and can be deleted. To provide clarity throughout the channel lifecycle, the system applies status indicators to these channels to help users understand invitation progress and ownership changes.

Channel Status	Visible When	Description
Pending	A channel invitation is sent	The channel invitation has been sent and is awaiting a response from the invited participant.
Invitation	The channel invitation is received	A user has received an invitation to join the channel and can choose to accept or decline the invitation.
Declined	The invitation is declined	The invited participant has declined the channel invitation. The channel entry is removed from the invitee's channel list. In the inviter's channel list, the channel status changes from <i>Pending</i> to <i>Declined</i> .
Ownerless	Channel owner deletes the channel	The channel owner has deleted the channel. If the channel contains existing data, it remains available to the participant in an ownerless status and is moved to <i>Hidden Channels</i> . In this state, the participant can edit existing data but cannot add new content.

Actions Supported in a Channel

Within a channel, the channel owner and participant can perform the following actions:

- Manage the participant's activities in the [Activities](#) view.
- Manage the participant's achievements in the [Achievements](#) view.
- Hold and review 1:1 meetings in the [Meeting](#) view.

Note

- Currently, each user is restricted to 300 active channels and 300 hidden channels.
- Currently, it's not possible to create a report on channels between Multiple Roles users.

Related Information

[Understanding Channel Logic with Continuous Performance Management Multiple Roles Functionality \[page 46\]](#)

[Activities View \[page 52\]](#)

[Achievements View \[page 60\]](#)

[Meeting View \[page 62\]](#)

3.1.1 Understanding Channel Logic with Continuous Performance Management Multiple Roles Functionality

Answers to questions about how Continuous Performance channels work with multiple roles functionality.

Context

With Continuous Performance, employees can set up channels outside the traditional manager-direct report hierarchy. The logic behind the multiple roles is similar to that of the traditional reporting relationship, now extended to allow for other relationships.

With the option [Enable Multiple Role Support](#) enabled in [Continuous Performance Management Configuration](#), there's a **channel owner** (similar to a manager role) and a **channel participant** (similar to an employee role). The participant is responsible for completing the activities created in the channel and is able to link the activities to their own goals, while the channel owner cannot link these activities to their goals.

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 Channels column is hidden for employees or managers?

Role-based permissions control whether the [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 [Channels](#) column doesn't appear for anyone with that role and has only one channel. 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 on Goal Management page, who can see that activity on Continuous Performance page?

If an employee adds an activity to a goal on the Goal Management page, the activity linked to the goal appears in the [Activities](#) view of the employee's Continuous Performance channel. The employee's direct manager sees the activity on the Goal Management page but can only drill into the activity if they co-own the activity. When the activity is created in a channel with another employee, for example a matrix manager, they will see the activity on the goal plan and drill into that activity in their Continuous Performance channel.

When employee B joins a 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 activities in a shared goal. Drilling down into an activity from the goal plan is only available in the meeting channel between employee A and employee B. From the goal plan page, employee B's 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 channel in such a way that activities and goals can be created or linked for both the channel owner and the channel participant?

No, only the activities and goals of the channel participant are shown in the shared channel, not those of the channel owner.

If employee A invites employee B to join a channel and employee B links an activity to a goal, who can see the activity?

Both the channel owner (employee A) and the channel participant (employee B) sees the activity in their shared channel. The manager of employee B can see the activity on the Goal Management page.

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, including all the activities linked to the goals (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 channel. When employee A creates activities or achievements, who is the owner of those Activities and Achievements?

The channel participant (employee B) is the owner.

The channel owner (employee A) can create activities and achievements then link goals to those activities for the channel participant (employee B), depending on role-based permissions and target population for those permissions. However, the channel participant (employee B) is considered the owner of the activities and achievements.

If employee A invites employee B to join a 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 channel owner's (employee A) goals won't be available for linking to activities in the shared channel. Only the 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 channel participant's (employee B) default goal plan.

Is it possible for channel participants to view the achievements of channel owners?

No, it isn't possible. Channel owners can view the achievements of channel participants, but participants can't view channel owners' achievements.

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

If employee A and B have multiple job relationships, for example, A is also B's matrix manager, they can have two channels, one for line manager-employee relationship, and one for matrix manager-employee relationship.

Is it possible to share activities created in a channel between an employee and their manager to a channel shared between the employee and another user?

Yes, if the setting [Enable Cross-Channel Activity Sharing](#) is enabled in [Continuous Performance Management Configuration](#) tool, users can share their activities in a channel that they participate in to another channel where

they are also the participant. The source and target channels are not limited to the channel between them and their manager.

Is it possible for channel owners to request feedback on the activities created in any of their channels?

No, only direct managers can request feedback on activities created in their channels with direct reports.

→ Remember

Enable Multiple Roles Support functionality only applies to Continuous Performance, not Continuous Feedback.

Do the reports for matrix managers automatically display in the channel List?

You need to enable the option ► *Continuous Performance Management Configuration* ► *Enable matrix managers and matrix reports to be shown as people selections for Channels by default* ► in order to allow the system to automatically create channels between matrix managers and matrix reports.

Is it possible to hide the channels shared between managers and their direct reports?

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

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.

3.1.2 Creating Channels

Users can create 1:1 channels on Continuous Performance Management with other colleagues to better share activities and goals, and track discussion topics with meeting notes. Managers have channels automatically created with their direct reports.

Prerequisites

- [Enable Multiple Role Support](#) is enabled in [Continuous Performance Management Configuration](#) admin tool.
- Users have been granted the ► [User Permissions](#) ► [Continuous Performance Management User Permission](#) ► [Access Continuous Performance Data](#) ► and [Access Continuous Performance Page](#) with appropriate target population defined.
- Users who can search for target employees with certain search criteria should have the permission ► [User Permissions](#) ► [General User Permission](#) ► [User Search](#) ► and the permissions mentioned in [Configuring People Search](#).
- Users who want to search for target employees by groups, should first define certain groups in ► [Settings](#) ► [Groups](#) ►.

Context

Users with permission, can invite others to a 1:1 channel, supporting reporting beyond the traditional manager hierarchy. They can't invite themselves and other users whom they already share a channel with or sent an invitation to, or who they don't have permission to access. The users that receive the invitation can accept or decline it.

Procedure

1. Select the [Invite](#) button on the header of the [Channels](#) list.
2. In the [Invite](#) dialog, Search and select employees one by one. You can also select the Advanced Search (🔍) icon to open the [Find Employee](#) dialog, in which more search criteria are available for use.
3. In the [Search Results](#), make selections. If you choose to select all, the first 20 users that get loaded at the initial time are selected. You can scroll down to load more times, then select all for more.
4. Review the selected users in the [Selection List](#).
5. Choose [Invite](#) to send the invitation.

Next Steps

Recipients of the channel invitation can accept or decline the request. Upon acceptance, the channel is created, with the invitation sender as the channel owner and the recipient as the channel participant.

3.1.3 Deleting Channels as the Owner

Channel owners can delete channels including declined channel invitations as needed.

Prerequisites

- [Enable Multiple Role Support](#) in [Continuous Performance Management Configuration](#) admin tool is enabled.

Context

Channels that involve the existing employee-manager and employee-matrix manager relationships can't be deleted. You can delete channels one by one, or in bulk. If a channel has existing data, such as activities, achievements, and meeting history, it will remain in the participant's channel list. The channel will be moved to [Hidden Channels](#) and marked as [Ownerless](#). The participant can edit only the existing content. However, empty channels will be removed from the participant's channel list as well.

Procedure

1. **Option one: Single deletion.** Select the trash bin icon () that shows when you hover on the channel item in the list, or select the [Delete Channel](#) button in the channel's Activities view (for declined channel invitation, select the [Delete](#) button in the details page).
2. **Option two: Bulk deletion.** Choose [Select And Delete Channels](#) button on the header of the channel list, and in the [Delete Channels](#) page, select and delete up to 50 channels in one time.

3.1.4 Deleting Channels as the Administrator

Administrators with permission can delete channels including declined channel invitations as needed.

Prerequisites

- [Enable Multiple Role Support](#) in [Continuous Performance Management Configuration](#) admin tool is enabled.
- You have the ► [Administrator Permissions](#) ► [Manage Continuous Performance Management](#) ► [Delete Channels](#) ► permission.

Context

Channels that involve the existing employee-manager and employee-matrix manager relationships can't be deleted. If a channel has existing data, such as activities, achievements, and meeting history, it will remain in the participant's channel list. The channel will be moved to [Hidden Channels](#) and marked as [Ownerless](#). The participant can edit only the existing content. However, empty channels will be removed from the participant's channel list as well.

Procedure

1. Go to ► [Admin Center](#) ► [Delete Channels](#) ► admin tool.
2. Search for channels by owner, participant, last update date.
3. Select and delete channels.

3.2 Activities View

Activities are actions taken toward achieving goals. What you are working on may or may not be related to a goal, though these actions can be captured as activities. In the [Activities](#) view of the selected channel, the channel owner and participant can manage activities created within this channel and activities shared from other channels that the **participant** needs to complete.

→ Tip

A quick way to identify who is the participant of a channel from the [Activities](#) view: Select a channel and in the activities overview page, check the page header. If it shows [My Activities with <name>](#), you're the participant. If it shows [Activities for <name>](#), the other user is the channel participant.

📘 Note

There's no restriction to the number of activities created. However, at most 300 recently updated activities can be displayed on the UI. An activity's last updated date refreshes whenever it's edited or shared for the first time to other channels.

View by Status

Every activity has a status value to indicate progress. The [View by Status](#) filtered view, the default landing view, provides a clear overview of the channel participant's current focus for continuous performance.

View by Goal

Activities can be linked to goals to indicate a relationship between the channel participant's daily tasks and their performance and development goals. On the activities overview page, you can filter activities by either [Performance Goal](#) or [Development Goal](#). Up to 100 lately updated performance goals or development goals can show on the overview page.

- You're able to select from goal plans and view goals that you have access to.
- Each goal from your currently selected goal plan is shown on an individual column with their linked activities. On a column, activities are ordered by last modified time. The most recently edited activity appears at the top.
- From the [View by Performance Goal](#) tab, the channel participant can add a new goal by choosing the [+ Create Goal](#) button on the far right of the page. The added goals are included in their default performance goal plan.
- You can edit and delete performance goals. When a goal is deleted, their linked activities are not deleted, but moved to the [Not Linked to Goals](#) column.

📘 Note

To add, edit, and delete goals, you need to have the corresponding permissions. For details, refer to [Permissions for Goal Plan Templates](#).

- The [Not Linked to Performance Goals](#) column includes activities that are tied to no performance goals. The [Not Linked to Development Goals](#) column includes activities that are tied to no development goals.

Create Activity

When you select the [Create Activity](#) button, that opens a dialog where you can add these activity details.

- Activity name
- Status
- Linked goals. An activity can be linked to up to 20 performance goals and 20 development goals across different goal plans, including those from legacy (unconverted) goal plans.
- Attachments. An activity can have up to 5 attachments.

Note

If you are a manager, you can create, update, delete activities on behalf of your direct reports.

Activity Details

When you select an activity card on the overview page, that activity opens in the [Activity Details](#) view, where you can perform these tasks:

- Edit the activity name.
- Post a comment in the [Updates](#) area, and edit or delete your previous comments.
- View feedback provided on (linked to) the activity.
- Request feedback about the activity.

Note

You can view and request feedback on your own activities, those recorded in any channels that you participate in. If you are a manager, you can additionally view and request feedback on your direct reports' activities within the channels between you and them.

- Delete the activity.

Note

If the activity is shared from another channel, only the source channel owner and participant can delete it. If the activity is deleted, its corresponding achievement is deleted.

- Change the activity status. When an activity is completed, you can mark it as an achievement. The activity card on the overview page will then have a  [Marked as Achievement](#) icon, and the corresponding achievement card will be created in the [Achievements](#) view.
- Link the activity to goals. An activity can be linked to up to 20 performance goals and 20 development goals across different goal plans, including those from legacy (unconverted) goal plans.
- Add attachments to the activity.

Related Information

[Adding, Editing, and Deleting Goals in Activities View \[page 58\]](#)

[Channels \[page 44\]](#)

3.2.1 Sharing Activities Across Channels

Users can share their activities across 1:1 channels, giving relevant users the ability to view and edit these activities for seamless collaboration between multiple stakeholders.

Prerequisites

- Users are a participant in one or more 1:1 channels.
- The option [Enable Cross-Channel Activity Sharing](#) is enabled in [Continuous Performance Management Configuration](#) tool.

Context

As a channel participant responsible for completing the activities within channels, you can share your activities with other channels where you participate for expanded collaboration. Your channel owners cannot share or unshare your activities, including those that they created on your behalf, but can track where you've shared the activities from and to. You can either share (or unshare) an activity to other channels or bulk share (or bulk unshare) activities to one channel.

Procedure

- **Bulk Share or Bulk Unshare Activities to a Single Channel**
 - a. Select a channel that you participate in and go to the [My Activities with <channel owner's name>](#) view.
 - b. Choose the [Share Activities](#) button.
 - c. In the [Share Activities with Another Channel](#) dialog, choose the target channel. Select or deselect activities. Check or uncheck [View and Add Comments](#), which controls whether the target channel owner can view and add comments on each activity. The checkbox is by default checked.
 - d. Select the [Save](#) button to confirm your settings.
- **Share or Unshare a Single Activity to Channels**
 - a. Select a channel that you participate in, and from the Activities kanban view open an activity that you want to share with other channels.
 - b. In the [Activity Details](#) page, select the [Share](#) button or the [Channels \(<count>\)](#) link in the [Shared With:](#) field.
 - c. In the [Share Activity Across Channels](#) dialog, select one or more target channels that you want to share the activity with, or unselect channels that you want to stop their owners from accessing the activity. Check or uncheck [View and Add Comments](#), which controls whether each target channel owners can view and add comments on the activity. The checkbox is by default checked.
 - d. Select the [Save](#) button to confirm your settings.

Results

- Shared activities display a  (*Shared across channels*) icon on their cards in the Activities kanban view.
- The selected channel owners can track source and destination channels through the *Channels (<count>)* link in the *Shared With:* field. The field and link are not available for activities that you've not shared.
- The selected channel owners can view and edit details of these shared activities. If you allow, they can also add comments on them.
- An achievement converted from a completed activity is displayed in all channels sharing the activities. If you later unshare the activity from a channel, the activity is removed while the achievement remains in the channel.

Note

- Only you as the channel participant and the source channel owner can delete the activity. By deletion, the activity and its corresponding achievement, if it has one, will be removed from all channels. The achievement, on the other hand, can be deleted by you and both the source and target channel owners. Deleting the achievement in a channel removes it and its associated activity from all channels.
- The *Share Activities with Another Channel* and *Share Activity Across Channels* dialogs display up to 300 most recently updated activities. An activity's last updated date refreshes whenever it's edited or shared for the first time to other channels.

3.2.2 Requesting Feedback on Activities

Users can request feedback from others on their activities to gather relevant input and improve performance outcomes.

Prerequisites

- You have granted users the  *User Permissions* > *Continuous Performance Management User Permission* > *Access Continuous Feedback Data* > permissions.
- You have granted users the  *User Permissions* > *Continuous Performance Management User Permission* > *Request feedback from others* > and *Limit about whom feedback can be requested* permissions.
- You have granted users the  *User Permissions* > *Continuous Performance Management User Permission* > *Access Continuous Performance Data* > and *Access Continuous Performance Page* permissions.
- The *Enable Activity-Feedback Linking* feature is enabled in the *Continuous Performance Management Configuration* tool.
- (Optional) The *Enable User-Controlled Goal Visibility in Feedback Requests* feature is enabled in the *Continuous Performance Management Configuration* tool, if you want to provide users the autonomy to choose whether the request recipients can view names of all linked goals.

Note

By enabling this feature, you are deciding that your organization trusts its employees to manage their own goal confidentiality when requesting feedback.

Context

Users can request feedback on specific activities. They can choose to send the request with activity information, which helps recipients understand the scope of their feedback should be on, enabling them to provide more relevant and detailed feedback. When a manager (or a channel owner) requests feedback on an activity within a channel, as the activity is recorded/watched for or by their direct report (or channel participant), they are actually requesting feedback about this direct report (channel participant)'s work. The direct report (channel participant) is the feedback subject user. For more clarification about the channel owner and participant roles, refer to [Channels \[page 44\]](#).

Procedure

1. Navigate to an activity details page.
2. Choose [Request Feedback](#).
The [Request Feedback on Current Activity](#) dialog shows.
3. In the [Recipients](#) field, select people from the suggested list or select the [Search All People](#) checkbox to search among all users you have permission to access.

Note

Switching between selection mode and search mode removes all previous selections.

When users request feedback for themselves, they see the suggestion drop-down if they can request feedback from any of their direct manager, matrix managers or peers. When requesting for another employee, they can access the drop-down if they are able to send the request to any of that employee's matrix managers or peers.

4. (Optional) Select the [Show Activity to Recipients](#) checkbox to share activity information with the request recipients.
When selected, recipients can view the basic information of the activity on the feedback request, including the name, status, and last updated date.

Tip

To access the hyperlink and go to the activity details page for more information, the recipients should have a channel with the feedback subject user. This channel must contain the activity so there's an existing details page that they can navigate to. In the meantime, the feedback subject user is within the target population of the [User Permissions > Continuous Performance Management User Permissions > Access Continuous Performance Data](#) permission and the [View](#) permission under [User Permissions > Continuous Performance Management > Activity](#).

5. (Optional) If the [Enable User-Controlled Goal Visibility in Feedback Requests](#) feature is enabled, choose whether to show the recipients all goals linked to the activity regardless of permission restrictions.
By default, the system shows only goals that the recipients have permission to access.
6. Enter a topic name and optionally more topic description. The topic is what the requested feedback focuses on.
7. Enter at least one feedback question. Use the defaults or edit them to customize your own ones.
8. (Optional) To remove a question, select the trash bin icon next to the question. The trash bin is disabled if only one question remains.

9. Choose [Send](#) to submit your feedback request.

Results

Recipients receive notification about the feedback request on the home page. They can provide responses through the [Respond to Feedback Request](#) dialog or decline to respond.

Related Information

[Continuous Feedback \[page 66\]](#)

3.2.3 Adding, Editing, and Deleting Goals in Activities View

Users can manage their goals directly in the [Activities](#) view, without navigating to the [Goal Management](#) module page. In the [View by Performance Goal](#) tab, users can add, edit, or delete performance goals. From a [Create Activity](#) dialog, they can create new performance goals and development goals.

Prerequisites

- In [Admin Center](#) > [Goal Management Feature Settings](#), the [Enable Goal Management Access Permission](#) checkbox is selected.
- Users have [Goal Management Access](#) and [Access to Continuous Performance Management Data](#), and [Goal Plan Permissions](#) under [User Permissions](#) > [Goals](#).
- Users have at least an active goal plan, and have permission to create, edit, delete goals. For details permission settings, refer to [Permissions for Goal Plan Templates](#).
- Users have [Access Continuous Performance Data](#) and [Access Continuous Performance Page](#) permissions under [User Permissions](#) > [Continuous Performance Management User Permission](#).
- Users have [View](#) and [Edit](#) permissions under [User Permissions](#) > [Continuous Performance Management](#) > [Activity](#).

Note

Users are no longer able to create goals in the unconverted goal plan templates when the latest Goal Management is enabled.

Context

Users have more convenient control over their goals by creating, editing, or deleting goals directly from Continuous Performance Management module page. Any data changes will be synchronized to Goal Management.

Note

It's only possible for a user to create personal goals from Continuous Performance Management. For group goals and team goals, they still need to go to the [Goal Management](#) module page.

Note

Currently, the mobile apps doesn't support creating development goals when creating, editing and viewing activities.

Procedure

Creating Performance Goals and Development Goals from Create Activity Dialog:

1. In the [Activities](#) view of [Continuous Performance](#) page, choose [Create Activity](#) button.
A [Create Activity](#) dialog box shows.
2. In the [Linked Goals](#) section, choose [Link](#) button.
A [Link Activity to Goals](#) dialog box shows.
3. Choose [Create Goal](#) button.
Once saved, the new goal appears in the selection list for you to link with the activity.

Creating Performance Goals in View by Performance Goal Tab:

4. In the [Activities](#) view, choose [View by Performance Goal](#) tab.
In the kanban board, activities are grouped under their linked performance goals.
5. Scroll the kanban board to the far right, and choose [+ Create Goal](#) tile.
A [Create Performance Goal](#) dialog box shows.

Editing or Deleting Performance Goals:

6. In the [Activities](#) view, choose [View by Performance Goal](#) tab.
7. On a goal column, choose [... \(More\)](#) button.
Dependent on the permissions you have with [Goals Management](#), you're able to see either, both or none of the options to edit or delete a goal.

3.3 Achievements View

With the [Achievements](#) view, a channel owner and the participant can see a summary of the achievements that the participant has made. You can filter them by performance goal, development goal, or time frame.

Note

In the mobile experience, the [Achievements](#) screen is read-only. To view or edit the details of an achievement, you can instead go to the [Activities](#) screen.

Creating Achievements

Achievements are completed activities. There are two ways to create an achievement:

- In the [Achievements](#) view, you can directly create an achievement, and the corresponding activity with completed status will be automatically added to the [Activities](#) view.
- In the [Activities](#) view, when an activity's status is set to Completed (or its equivalent value), you can mark it as an achievement, which will be automatically displayed on the [Achievements](#) view.

Deleting Achievements

Deleting an achievement automatically removes its associated activity, and deleting a completed activity removes its related achievement. If the achievement and activity are displayed in multiple channels, they are removed from all of these.

Achievement Details

Selecting an achievement card opens its details page.

- You can view when it was created, updated, and achieved.
- You can edit its name and achieved date.
- You can view and edit its linked goals. An achievement can be linked to up to 20 performance goals and 20 development goals across different goal plans, including those from legacy (unconverted) goal plans.
- You can view and delete feedback on this achievement.
- You can delete the achievement.

Related Information

[Channels \[page 44\]](#)

3.3.1 Allowing an Enhanced Achievement Experience

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

Continuous Performance Management (CPM), makes it possible to create standalone achievements. When you change the status of an [Activity](#) to completed (or its equivalent), you're prompted to convert the activity into an [Achievement](#). You can also 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.

CPM allows configuration flexibility. An administrator 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 selecting Continuous Performance from the main navigation menu. Both Achievements and Activities views are available.	The My Activities view is shown when selecting Continuous Performance from the main navigation menu. 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 that they select is shown in a Kanban board that provides an easy, organized way to show progress toward goals.
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).

	Achievements Default View	Activities Default View
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

[Enabling Activities or Achievements as the Default View for Continuous Performance \[page 22\]](#)

3.4 Meeting View

[Continuous Performance](#) includes a dedicated meeting view that supports 1:1 meetings between a channel owner and a channel participant.

Overview

The [Meetings](#) view provides a space for 1:1 discussion about performance with an easy way to review the participant's current activities and achievements as well as structure an agenda of discussion topics. When a meeting is saved, it's archived in the [Meeting History](#), which allows a review of previous 1:1 meetings.

The meeting page is organized under two tabs: [Meeting Agenda](#) and [Activities Since Last Meeting](#). The [Meeting Agenda](#) tab displays discussion topics and allows you to add or edit meeting notes and view notes from the previous meeting. The [Activities Since Last Meeting](#) tab shows new and unfinished activities since the last meeting.

Major Functions

Area	Description	Comments
View Meeting	A button to open the Meeting view, available in the Activities and the Achievements view.	When the button is selected, the Meeting view opens and shows any unfinished activities or new achievements (completed activities) since the last 1:1 meeting, together with discussion topics and meeting notes.
Discussion Topics	Discussion topics create a focused agenda for the meeting. To add discussion topics, open a dialog with the + button. You can also use switches to mark discussion topics as discussed or not yet discussed.	• Create a shared meeting agenda or action items for each meeting. • Use discussion topics to document issues or ideas that are worthy of discussion.
Meeting Notes	Meeting Notes allows you to add notes or copy & paste related information to include with the meeting.	• Add notes or copy & paste text into meeting notes. • Meeting notes are only visible to the creator of the notes. • The current meeting shows both current notes and notes from the previous meeting if there is. Meetings archived in the meeting history only displays notes specific to that session.
Activities	The shared activities and achievements (completed activities) are shown. These activities can be filtered by status or goal.	• From within the meeting view, you can add a new activity, update an activity or edit the activity details. • From within the meeting view, you can add new performance goals and development goals. Note The Continuous Performance Management mobile experience only supports creating performance goals.
Finish and Add to Meeting History	Choose Finish and Add to Meeting History to archive the contents of the meeting. Saving the meeting confirms that the meeting occurred.	• It captures the activity status at the time of the meeting, along with your discussion topics. • The contents are archived to the Meeting History.

Area	Description	Comments
Meeting History	The Meeting History provides a dropdown selection of previous meetings by date. Users with the User Permissions Continuous Performance Management User Permission Edit Discussion Topics and Meeting Notes in Meeting History permission can edit discussion topics and meeting notes that are archived in meeting history. However, they can't add or delete discussion topics. Select the  icon to access change history dialogs to track all content changes to discussion topics and meeting notes. Status changes for discussion topics are not recorded. The change history is available to all users with no permission control.	- Mobile experience doesn't support editing discussion topics and meeting notes on the Meeting History screen. - In instances that previously used the now-removed Coaching Advice feature, managers and direct reports may still see the legacy coaching advice data in their meeting history.

Related Information

[Channels \[page 44\]](#)

3.4.1 Capturing Meeting Notes for 1:1 via the Web Application

If Meeting Notes are enabled in Continuous Performance Management, users can add notes.

Prerequisites

- 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. Sign on to the application.
2. Select [Continuous Performance](#) from the main navigation menu.
3. Select a person from the [Channels](#) column.
4. Choose the [View 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 [Finish and Add to Meeting History](#) to close the meeting and save the notes.

📌 Note

You can prepare for a meeting ahead of time, for example create new agenda items, before the actual meeting occurs. By using the breadcrumb to return to [Activities](#), the changes made are saved though the meeting isn't considered finished. When the actual 1:1 meeting occurs and the updates completed, [Finish and Add to Meeting History](#) closes the meeting and adds to the Meeting History. Because meetings capture a snapshot of activities and the agenda of the meeting, once you've finished the meeting, no changes can be made.

4 Continuous Feedback

Continuous Feedback enables users to request and provide feedback at any time, which extends the traditional manager-employee interactions and includes input from various sources, including peers. Feedback can be tied to **activities** and subsequently revisited during **1:1 meetings**. The seamless integration with Continuous Performance can ensure that performance review is informed by real-time feedback.

Prerequisites

Allowing Continuous Feedback needs configuration settings and permissions applied.

Configurations

- From  [Admin Center](#) > [Continuous Performance Management Configuration](#) :
 - Enable Continuous Feedback
 - Enable Activity-Feedback Linking
 - (Optional) Disable Deleting Feedback
 - (Optional) Enable Continuous Feedback Outlook Integration

Role-based Permission Settings

Refer to [Role-Based Permissions for Continuous Performance Management \[page 15\]](#).

Overview

From the main navigation menu, you go to the [Continuous Feedback](#) page. In this space, you can view received feedback, provide and request feedback for **yourself and your direct reports**.

The default landing page shows your feedback overview information, if you're within the target population of your permission role. With permission to view your direct reports' feedback information, you can select their names in the [Active Channels](#) list to view their received feedback. However, the feedback and feedback requests they've sent aren't available to you.

Major Features

Area	Description	Notes
Active Channels list	Only a manager with permission to access their direct reports' feedback information sees the Active Channels list. By selecting the corresponding person's name from the list, you go to the feedback information page of that individual.	Users with no direct reports are unable to view and switch between channels. They can only see their own feedback information. The channel list can't be edited and only provides choices to see the manager themselves and their direct reports. Giving or receiving feedback doesn't automatically create a new channel.
Feedback Received tab	When the tab is selected, received feedback is shown and arranged by the date received. A feedback card shows  when it's visible to your manager and shows  if the feedback is linked to an activity.	The you (self) channel has the following filter selections: • Only show feedback with a linked activity • Only show feedback that I've shared with my manager • Only show feedback within this date range Any other selected channels only provide the filter for Only show feedback within this date range.
Feedback Given tab	When the tab is selected, any feedback given is shown in the order of the date given, including unsolicited feedback and responses to feedback requests.	You can filter for Only show feedback within this date range. When you send feedback, you don't see whether your feedback was made visible to the recipient's manager. You also won't see whether the recipient tied the feedback to an activity.
Feedback Requests Sent tab	When the tab is selected, all requests for feedback that you've sent are shown, arranged by the date sent. You can track the status of each request, whether it's awaiting a response or has already been responded or declined.	Feedback request cards include the status of the request: • Feedback Received • Request Pending • Request Declined You can filter by Only show feedback within this date range.

Area	Description	Notes
feedback cards feedback request cards	In the above three tabs, feedback or feedback requests are arranged in cards. You can select View more on a card to open the details page for more information.	The card shows the name of the person who receives or provides the feedback or request, and next to the name there's an icon  to open the person's Profile Preview.
Feedback Details page	A new view is shown when View more is selected for a feedback card. The details page shows the questions and answers provided in the feedback. For received feedback, these features are available: There's a button to make the feedback visible to your manager. Unsolicited feedback provided by people other than your manager is by default not visible to your manager. Feedback given or requested by your manager is always visible to them and can't be altered. There's a Delete Feedback button only available for unsolicited feedback. You can't delete feedback given or requested by your manager. You can search or select from the dropdown list of Linked Activity to associate an activity with the feedback you received. You and your manager can view the feedback-activity linking information on the Activity Details page. You can also select the feedback givers' name or the name card icon  and navigate to their People Profile as a way for contacting and following up.	There's a breadcrumb navigation above the page header to return to the Feedback view that by default shows the received feedback information.
Request Feedback button	Selecting this button opens a dialog box. You then select one or more people for your request, add a topic, and either use the provided questions or edit them to ask your own. Once the request is sent, a card is added to your Feedback Requests Sent area.	For more information, refer to Requesting Feedback [page 71] .

Area	Description	Notes
Give Feedback button	Selecting this button opens a dialog box. You then select one or more people for your feedback, enter a topic, and either use the provided questions to organize your feedback content or use your customized ones. Once the feedback is sent, a card is added to your Feedback Given area.	For more information, refer to Giving Feedback [page 70] .

Give and Request Feedback

There are many ways for giving and requesting feedback:

- [Request Feedback](#) and [Give Feedback](#) buttons on the [Feedback](#) view.
- [Request Feedback](#) from an [Activity Detail](#) in the [Activities](#) view of Continuous Performance.
- Using [Quick Actions](#) on the home page (when enabled).
- Give feedback from the Microsoft Outlook toolbar (when configured).
- Request Feedback and Give Feedback directly from Microsoft Teams (when configured).

Decline Feedback Requests and Delete Feedback

- The recipient of a *request for feedback* either provides feedback or declines the invitation. It isn't possible to delete a pending [Feedback Request](#).
- The recipient of provided feedback can delete it, though they can't delete feedback provided by their current manager.

Note

Neither the feedback recipients nor their managers can delete the feedback provided by the managers, though the feedback of a previous manager can be hidden from the current manager.

Related Information

[Giving Feedback \[page 70\]](#)

[Requesting Feedback \[page 71\]](#)

4.1 Giving Feedback

You as an end user can provide feedback to colleagues on the [Continuous Feedback](#) page.

Prerequisites

- Continuous Feedback has been enabled through [Continuous Performance Management Configuration](#) tool.
- You and the feedback receivers have the ► [User Permissions](#) ► [Continuous Performance Management User Permission](#) ► [Access Continuous Feedback Data](#) ► and [Access Continuous Feedback Page](#) permissions.
- You have the ► [User Permissions](#) ► [Continuous Performance Management User Permission](#) ► [Give Continuous Feedback](#) ► permission.
- You have the ► [User Permissions](#) ► [General User Permission](#) ► [User Search](#) ► permission.
- You yourself must be included in your permission role's target population. The [Exclude granted users from having the same access to themselves](#) option must not be selected.

Context

To whom you can provide feedback is determined by the target population of your permission role. Continuous Feedback offers a constructive approach to give feedback, using questions to guide your feedback content. You must answer at least one feedback question. Questions are pre-defined by the system or configured by your administrator through the [Manage Languages](#) tool. You can use the defaults, edit them to customize your own questions, or delete questions you don't need, but at least one question must remain.

Procedure

1. Go to [Continuous Feedback](#) page.
2. Select [Give Feedback](#) button on the page header and open the dialog for providing feedback.
3. In the [Recipients](#) section, select at least one feedback recipient from system-suggested people or search for recipients. Only users who can provide feedback to at least one of their direct reports or peers can access the suggestion drop-down menu. Otherwise, they can only search for people. For those who can both select and search.
 - To search all accessible employees, select the [Search All People](#) checkbox.
 - To select from only your direct reports and peers, leave the checkbox deselected. If you're a manager, the suggested people include up to five randomly selected **direct reports** who are in your permission role's target population. If you don't have direct reports, the five suggestions are randomly selected from your **peers**.
4. In the [Topic](#) section, fill in the [Topic Name](#) field, and optionally provide more context in the [Topic Description](#) field.

5. In the [Question-Guided Feedback](#) section, enter at least one pair of feedback question and answer. Use the default questions or edit them to customize your own ones. Delete unwanted questions using the trash bin icon, which is disabled if only one question remains.
6. Send your feedback.

Results

The feedback recipients will see your feedback on their [Continuous Feedback](#) page under the tab [Feedback Received](#). They can choose to tie your feedback specifically to one of their activities.

4.2 Requesting Feedback

You as an end user can request feedback from others on [Continuous Feedback](#) page.

Prerequisites

- Continuous Feedback has been enabled through [Continuous Performance Management Configuration](#) tool.
- You have the ► [User Permissions](#) ► [Continuous Performance Management User Permission](#) ► [Access Continuous Feedback Data](#) ► and [Access Continuous Feedback Page](#) permissions.
- You have the ► [User Permissions](#) ► [Continuous Performance Management User Permission](#) ► [Request feedback from others](#) ► permission.
- You have the ► [User Permissions](#) ► [Continuous Performance Management User Permission](#) ► [Limit about whom feedback can be requested](#) ► permission.
- You have the ► [User Permissions](#) ► [General User Permission](#) ► [User Search](#) ► permission.
- You yourself must be included in your permission role's target population. The [Exclude granted users from having the same access to themselves](#) option must not be selected.

Context

If you are a manager, you can not only request feedback for yourself, but also on behalf of your direct reports. To whom you can send feedback requests is determined by the target population of your user's permission role. Continuous Feedback offers a constructive approach to ask for feedback. When requesting feedback, you must provide a topic to focus your request on a specific area, for example, an activity. Meanwhile, at least one feedback question is required. Questions are pre-defined by the system or configured by your administrator through [Manage Languages](#) tool. You can edit or delete them to adapt to your own needs.

Procedure

1. Go to [Continuous Feedback](#) page.
2. (Only for managers) Select whom you want to request feedback for from the [Active Channels](#) list, either you or one of your direct reports.
3. Select [Request Feedback](#) button on the page header.
4. In the dialog popup, select at least one recipient to provide you with feedback. By default, the system provides a drop-down for you to select from suggested people. To search beyond these suggestions, select the [Search All People](#) checkbox to switch to the search mode. In this mode, you can search among all users you are permitted to access. Switching between the two modes removes all previous selections.

→ Tip

When you request feedback for yourself, you see the suggestion drop-down if you can request feedback from any of your direct manager, matrix managers or peers. When requesting for a direct report, you can access the drop-down if you are able to send the request to any of the report's matrix managers or peers.

5. Enter a [Topic Name](#) that you want the respondents to focus on. You can optionally provide more information in the [Topic Description](#).
6. Enter at least one feedback question. Use the defaults or edit them to customize your own ones. To remove a question, select the trash bin icon. It's disabled if only one question remains.
7. Send your request.

Results

The recipients can see and respond to your requests on their home page. Once they respond, the feedback responses will be displayed on the feedback subject user's [Continuous Feedback](#) page under the tab [Feedback Received](#). Feedback requested by managers are always visible to them and cannot be hidden.

4.3 Removing Continuous Feedback Data as an Administrator

An administrator can permanently delete feedback given to users.

Prerequisites

- Continuous Performance Management is enabled.
- The administrator role has the ► [Administrator Permissions](#) ► [Manage Continuous Performance Management](#) ► [Admin Access to Delete Continuous Feedback Page](#) ► permission.

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.
- A manager can't delete feedback when that feedback is technically owned by the employee. The system doesn't support a manager removing feedback of an employee.

The system allows for a special administrator role that has 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.

Note

You can't delete the Feedback Request. A request can't 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.
- Any deletion of feedback by the administrator is permanent and can't be restored.
- In *Reporting*, the *Feedback status* is shown as deleted and *Last updated by* shows the name of the administrator.

Remember

If the recipient of the feedback is inactive in the system, an administrator can't delete the feedback. An inactive user doesn't appear when searching the *Receiver Name* field. No search results are returned for *Giver Name* for an inactive user.

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.

ⓘ 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.

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.

5 AI-Assisted Writing in Continuous Performance Management

The AI-assisted writing tool is an interactive tool that uses generative AI capabilities to assist employees with their writing tasks. While writing content in the SAP SuccessFactors applications, employees can leverage the features of the AI-assisted writing tool to enhance multiple aspects of their writing, such as clarity, conciseness, and tone.

In Continuous Performance Management, the tool provides support in all free text area. Users can access certain actions in the menu that appears after selecting the text. In the mobile experience, the AI-assisted writing currently is only available on Continuous Feedback screens.

The following is a summary of the capabilities offered by the AI-assisted writing tool:

- Uses language processing capabilities to understand the context of a sentence and suggest enhancements in grammar, spelling, vocabulary choices, and phrasing.
- Ensures improved readability and a consistent tone (professional, personable, or constructive) to suit the communication needs for different audience groups in the organization.
- Provides the options to communicate a message in fewer or more words and transform paragraphs to bulleted lists.
- Provides additional actions in the context of the tasks that users perform in their SAP SuccessFactors applications.

The following table outlines the available actions in the AI-assisted writing tool.

Note

To use the AI-assisted writing you have a license for SAP AI Units. For more information about SAP AI Units license, please contact your account executive.

Action	Description
Enhance Writing	Suggests enhancements in grammar, spelling, vocabulary choices, and phrasing in the context of the selected line or paragraph.
Change Tone	Provides options to change the tone of the selected line or paragraph to professional, personable, or constructive to suit the communication needs for different audience groups in the organization.
Make Shorter	Shortens a selected line or paragraph to convey the message more concisely.
Make Longer	Rewrites a selected line or paragraph by adding more words to provide a detailed explanation based on the original content.
Make Bulleted List	Converts a selected line or paragraph into a bulleted list to simplify complex information, and enhance readability by breaking it down into easy-to-read points.

Action	Description
Analyze Text	Performs a safety scan on each text box, prompt entry, or Generative AI output in order to detect bias, and suggest replacement text for any language flagged as potentially biased, discriminatory, or harmful.
Translate	Translates the written text into the target language chosen by the user. The following capabilities are supported with this action: • Translation from en-US (US English) to all 46 languages supported in SAP SuccessFactors. • Full translation between the following languages: English (US), German, French, Spanish, Portuguese, Chinese (Simplified) and Japanese.
Make Feedback Actionable	Only available when users are giving responses to feedback questions. It provides tailored suggestions for actions that can be taken moving forward.

Note

For information about the languages supported by the AI-assisted writing tool, refer to SAP Note [3396784](#) .

Related Information

[Enabling AI-Assisted Writing](#)
[User Feedback on AI Features](#)

5.1 Enabling AI-Assisted Writing

Enable AI-assisted writing, including [Translation](#) and [Text Analyzer](#) features in SAP SuccessFactors applications to help users enhance the quality of their writing.

Prerequisites

- You've purchased the AI units license. For more information about AI units license, please contact your Account Executive.
- You have the  [Administrator](#)  [Manage AI Capabilities](#)  [AI Services Administration](#)  permission.
- Users have the  [User Permissions](#)  [AI Access](#)  [Assisted Writing](#)  permission.

Procedure

1. Go to ► [Admin Center](#) ► [AI Services Administration](#) ►.

2. In [Global Features](#), enable the [Assisted Writing](#) switch.

Allows users to access the [Enhance Writing](#), [Change Tone](#), [Make Shorter](#), [Make Longer](#), and [Make Bulleted List](#) actions, and other module-specific actions (if applicable) in the assisted writing menu.

3. Under [Assisted Writing](#), you can enable additional switches as needed.

Ensure that the [Assisted Writing](#) switch is enabled before proceeding.

- a. Choose the [Translation](#) switch.

Allows users to access the [Translate](#) action in the assisted writing menu to convert their content into a target language.

- b. Choose the [Text Analyzer](#) switch.

Allows users to access the [Analyze Text](#) option in the assisted writing menu to review their text for bias, discriminatory, or harmful language.

Note

The [Translate](#) and [Analyze Text](#) options appear in the assisted writing menu only when their respective toggles are enabled.

Next Steps

Users can view the AI-assisted writing tool icon when they navigate to the text input area and use the options in the assisted writing menu to enhance their writing.

Related Information

[Accessing the AI Services Administration Page](#)

6 Continuous Performance Management Email Notifications

You can enable Continuous Performance Management to send emails so that users and administrators receive timely updates about Continuous Performance Management. The emails alert employees to changes that require attention, like pending tasks.

You can enable and configure email notifications in ► [Admin Center](#) ► [Email Notification Templates Settings](#) ►.

The email notifications listed below, if enabled, are triggered when certain actions linked to the notifications occur.

- Activity Update Notification
- Continuous Feedback Received Notification
- Continuous Feedback Responded Request Notification

Note

This email is only received by managers on feedback requests that they make for their direct reports.

- Continuous Feedback Request Notification
- Multiple Roles 1:1 Meeting Invitation
- Multiple Roles 1:1 Meeting Invitation Accepted
- Delivery Status of Multiple Roles 1:1 Meeting Invitations: When any failed delivery happens, the email will be sent.
- Channel Deletion Notification to Owners
- Channel Deletion or Move Notification to Participants

The following notifications aren't run on actions taken, but tied to the provisioning job:

- Delivery Status of Multiple Roles 1:1 Meeting Invitations: When you bulk send more than 40 invitations at once, a Provisioning job is triggered to perform the task. After the job completes, the email will be sent.
- Channel Deletion Notification to Administrators: When you delete more than 50 channels at once, a Provisioning job is triggered to perform the task. After the job completes, the email will be sent.

6.1 Enabling Feedback and Feedback Response Emails

You can enable email notifications for users when they receive feedback or responses to their feedback requests.

Prerequisites

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

Note

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

Context

The *Continuous Feedback* page displays ad-hoc feedback messages an employee receives from others. You can also enable email notifications for users when they receive feedback or responses to feedback requests.

Procedure

1. In *Admin Center*, go to *Email Notification Templates Settings*.
2. Choose an email notification to view its template details.
 - *Continuous Feedback Received Notification* (notifies about received feedback)
 - *Continuous Feedback Responded Request Notification* (notifies managers about responses to their requests for feedback on their direct reports)
3. Review the default template in the details panel. Customize the content if needed. If you want to add tokens, only use those supported for each template.
 - The default *Continuous Feedback Received Notification* includes the feedback provider's name, receiver's name, and a link to the feedback details page. Supported tokens for this template include: `[[FEEDBACK_RECIPIENT]]`, `[[FEEDBACK_GIVER]]`, `[[ALONG_WITH_OTHER_FEEDBACK_RECIPIENT]]`, `[[RECEIVED_FEEDBACK_LINK]]`, `[[TOPIC_NAME]]`, and `[[TOPIC_DESCRIPTION]]`.
 - The default *Continuous Feedback Responded Request Notification* includes the feedback requester's name, respondent's name, and a link to the feedback details page. Supported tokens for this template include: `[[FEEDBACK_REQUESTER]]`, `[[FEEDBACK_REQUESTEE]]`, `[[RECEIVED_FEEDBACK_LINK]]`, `[[FEEDBACK_REQUEST_DATE]]`, `[[TOPIC_NAME]]`, and `[[TOPIC_DESCRIPTION]]`.
4. Select the checkbox for each email notification you want to activate. Then choose *Save Notification Settings*.

Results

Users receive email notifications when they get feedback or responses to their feedback requests.

6.2 Enabling Feedback Request Emails

You can enable email notifications for users when they receive requests to provide feedback about others.

Prerequisites

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

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 users receive a feedback request, the system displays the request on the home page. You can also enable the email notification to serve as an additional reminder.

Procedure

1. Go to ► [Admin Center](#) ► [Tools](#) ► [E-mail Notification Template Settings](#) ►.
2. Select [Continuous Feedback Request Notification](#) to view the template details.
3. Review the default template settings in the details panel. By default, the email includes the feedback requester's name, request respondent's name, feedback receiver (subject user of the feedback)'s name, and a link to the feedback request details. You can customize the template for your organization. If you add tokens, use only the supported tokens: `[[FEEDBACK_REQUESTEE]]`, `[[FEEDBACK_REQUESTER]]`, `[[REQUEST_SUBJECT_PERSON]]`, `[[TOPIC_NAME]]`, `[[TOPIC_DESCRIPTION]]`, `[[FEEDBACK_REQUEST_LINK]]`, and `[[RECIPIENT_USERNAME]]`.
4. Select the checkbox for this email notification to activate it. Then choose [Save Notification Settings](#).

Results

Users receive email notifications when they receive a feedback request.

6.3 Enabling Continuous Performance Management Activity Update From Manager Emails

You can enable Continuous Performance Management to send emails 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 email notification to the employee when the employee receives a manager update or comment. This helps employees receive manager guidance immediately. To send this email notification, enable it on the email templates configuration page, and configure it as an Intelligent Services event.

Note

- The [Activity Update Notification](#) is only supported for the direct manager to direct report relationship.
- The [Activity Update Notification](#) isn't triggered for the multiple roles functionality. For example, when the [Meeting Channel](#) owner in the shared channel adds an update to the subject's [Activity](#), no notification is triggered from this action.

Procedure

1. Sign in as an administrator and go to ► [Admin Center](#) ► [Tools](#) ► [Email Notification Templates Settings](#) ►.
2. Select [Activity Update 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.
3. Choose [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](#).
6. To save, choose ⋮ [Additional Options](#) and [Save Flow](#).

Results

Employees receive notification emails whenever their managers add updates to their activities.

6.4 Enabling Continuous Performance Management Multiple Roles 1:1 Meeting Invitation Emails

If you use the multiple roles functionality, you can enable Continuous Performance Management to send email notifications to employees when other employees invite them to a 1:1 meeting channel.

Prerequisites

- Continuous Performance Management is enabled.
- [Enable Multiple Role Support](#) is enabled on [Features Configuration](#) section of the [Continuous Performance Management Configuration](#) in the [Admin Center](#).
- [Enable Meeting Notes](#) is enabled on [Features Configuration](#) section of the [Continuous Performance Management Configuration](#) in the [Admin Center](#).

Context

By default, an employee 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. In [Admin Center](#), go to [Email Notification Templates Settings](#).
2. 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.
3. Choose [Save Notification Settings](#).
4. To activate the multiple role channel event that triggers the email notification, go to ► [Admin Center](#) ► [Intelligent Service Center](#) ►.
5. Select [Multiple Role Channel Event](#).
6. Choose ⋮ [Additional Options](#) and then [Save Flow](#).

The system adds a new flow rule.

Results

Employees receive email notifications upon getting a new meeting-space invitation.

Related Information

[Continuous Performance Management Email Notifications \[page 78\]](#)

6.5 Enabling Continuous Performance Management Reply Emails When Employees Accept a Multiple Roles 1:1 Meeting Invitation

If you use multiple roles functionality, you can enable Continuous Performance Management to send emails to employees when their 1:1 meeting channel invitation is accepted by other employees.

Prerequisites

- Continuous Performance Management is enabled.
- [Enable Multiple Role Support](#) is enabled on [Features Configuration](#) section of the [Continuous Performance Management Configuration](#) in the [Admin Center](#).
- [Enable Meeting Notes](#) is enabled on the [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. In [Admin Center](#), go to [Email Notification Templates Settings](#).
2. 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.
3. Choose [Save Notification Settings](#).
4. To activate the multiple role channel event that triggers the email notification, go to [Admin Center](#) [Intelligent Service Center](#).
5. Select [Multiple Role Channel Event](#).

The [Multiple Role Channel Event](#) details view is shown.

6. Choose **...** *Additional Options* 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

[Continuous Performance Management Email Notifications \[page 78\]](#)

6.6 Delivery Status of Continuous Performance Management Multiple Roles 1:1 Meeting Invitations

The **Delivery Status of Multiple Roles 1:1 Meeting Invitations** email is for channel invitation senders. They receive the email if the results of their mass invitation delivery can't be immediately displayed in the *Continuous Performance* page or if any delivery fails.

The *Delivery Status of Multiple Roles 1:1 Meeting Invitations* notification setting is enabled by default in *Email Notification Templates Settings* admin tool. You can't disable it but you can modify the email content to suit your needs.

The **Delivery Status of Multiple Roles 1:1 Meeting Invitations** email template supports two tokens:

- `[[INVITER_NAME]]`: The name of the channel inviter.
- `[[RESULTS]]`: A list of invitation recipients who successfully received the message. If there are any failed deliveries, the email also displays a list of recipients who didn't receive the message.

6.7 Enabling Continuous Performance Management Channel Deletion Emails

You can enable Continuous Performance Management to send emails to employees when their channels are deleted or moved. You can also enable an email that announces the result of the channel deletion job requested by an admin user.

Context

The email notifications are enabled by default. They use preset templates:

- *Channel Deletion Notification to Owners*: Notifies channel owners when the administrator deletes a channel for them. Tokens included in this email are `[[RECIPIENT_NAME]]` and `[[USER_NAME]]`. The former is populated with the channel owner name, the latter the participant name.
- *Channel Deletion or Move Notification to Participants*: Notifies channel participants that a channel is deleted or moved to *Hidden Channels* because the channel becomes ownerless after the owner leaves it, or the administrator removes the owner from it. Tokens included in this email are `[[RECIPIENT_NAME]]` and `[[USER_NAME]]`. The former is populated with the channel participant name, the latter the owner name.
- *Channel Deletion Notification to Administrators*: Informs administrators of the deletion result of each channel. A deletion job will run in Provisioning when more than 50 channels need to be deleted at once. If an administrator chooses to delete 50 or fewer, the result immediately pops up in a message, then the system won't send the email. Tokens included in this email are `[[RECIPIENT_NAME]]`, `[[REQUEST_DATE]]`, `[[REQUEST_TIME]]`, and `[[RESULTS]]`. They are populated respectively with the administrator name, the deletion job request date, the deletion job request time, and the list of deleted or not deleted channels with the names of their owner and participant.

Procedure

1. Go to ► [Admin Center](#) ► [E-Mail Notification Templates Settings](#) ►.
2. Choose a email notification and review the settings and content of the email.
3. (Optional) Adjust the email content based on your business need.
4. Save your changes.
5. (Optional) If you want to turn off a notification, deselect the corresponding checkbox.

7 Continuous Performance Management APIs to Support Activities and Achievements

Public, REST APIs are available on the SAP Business Accelerator Hub for building extensions and integrations for activities and achievements.

Representational State Transfer (REST) APIs have been developed for Continuous Performance Management (CPM) to support activities and achievements. These actions include:

- Activities
 - Get Activities
 - Post Activities
 - Get Activity Record ID
 - Patch Activity Record ID
 - Delete Activity Record ID
- Activity Updates
 - Get Activity Updates
 - Post Activity Updates
 - Patch Activity Updates
 - Delete Activity Updates
- Activity Status
 - Get Activity Status
- Achievements
 - Get Achievements
- User Permission
 - Get User Permissions

These APIs get activity with pagination , Goals, and Achievements, as well as get permission for Activities and Achievements.

📌 Note

In Continuous Performance Management (CPM), an Achievement is considered as an Activity, but tagged as an Achievement. Create, read, update, and delete operations for achievements are supported through the Activity APIs.

There's an additional OData v4 API for Continuous Feedback available on the SAP Business Accelerator Hub.

Related Information

[Continuous Performance Management REST APIs on the SAP Business Accelerator Hub](#) 

[SAP Business Accelerator Hub for Continuous Feedback OData v4 API](#) 

8 Integrating with Other SAP SuccessFactors Modules

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

CPM and the Reimagined Home Page Experience

The 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 are visible for the user by going to Admin Center Manage Home Page Quick Actions .
Activity Cards	Shows recent activities on the home page of the user.	<i>Activity</i> 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 <i>Activity</i> 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.

Note

The *Activity* card does not support multiple role functionality. An *Activity* card is shown only when a manager makes an update and not

Feature	Comments
	when another channel owner makes an update.

CPM Integration

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

8.1 Integrating with Goal Management

If you're using the legacy Goal Management, you can view Continuous Performance Management achievements on the goal plan page. If you're using the latest Goal Management, you can view activities on the goal details page.

Prerequisites

- The *Enable Goal Management Access Permission* setting is enabled in the *Goal Management Feature Settings* admin tool.
- Users have the permission to view or edit achievements and activities under ► *User Permissions* ► *Continuous Performance Management* .
- Users have the permissions to access and use Goal Management.

Context

- In the *Activities* view of *Continuous Performance* page, users can create performance goals and development goals and link them to activities. The goals and linked activities are automatically synced to and displayed in the goal module page.

Note

If you're using the legacy Goal Management, only achievements (completed activities marked as achievements) can be displayed in the goal module page.

- In the latest Goal Management page, users can create activities under goals. They can track the progress of these activities towards goals in the *Activities* view of *Continuous Performance* page.

→ Remember

When adding activities from Goal Management, the [Create Activity](#) button is only available to an employee and their direct manager in the goal details page.

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

Functionality	Integration with the latest Goal Management	Integration with the legacy Goal Management (GM v12)
Create and view activities directly from with the goal plan	Yes	No
Continuous Feedback visible on the goal plan	No The goal details page provides link to activity details page which shows feedback information.	Yes
Achievements visible on the goal plan	Yes Activities in any status are visible, including achievements (completed activities marked as achievements).	Yes
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.

📘 Note

The following steps are required only for customers who're using the legacy Goal Management. The integration between the latest version of Goal Management and Continuous Performance Management is automatic. The [Linked Activities](#) section is always available on the goal details page.

Procedure

1. Go to ► [Admin Center](#) ► [Manage Templates](#) ►
2. Select the [Goal Plan](#) tab, and select the goal plan template in which you want to display Continuous Performance Management achievements or activities.
3. Choose the [General Settings](#) tab and select [Display Continuous PM Achievements on your goal plan](#) checkbox. If you've enabled the latest Goal Management, this option is automatically on and invisible from UI.
4. Save your changes.

Results

- For the legacy Goal Management: The [CPM Achievements](#) column is available on the [Goal Plan](#) page.

Note

The number of Continuous Performance Achievements linked with each goal appears in the [CPM Achievements](#) column on the [Goal Plan](#) page. When you choose the count under the [CPM Achievements](#) column, a pop-up window lists out the details of the linked achievements (completed activities), along with the feedback on the achievements. Please note that you can search for the linked achievements only by their title, not by any other metadata.

- For the latest Goal Management: The [Linked Activities](#) section is displayed on the goal details page. By selecting an activity name, you opens the activity details page.

Related Information

[Goals Management Overview](#)

8.2 Integrating with 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 are linked to and shown on performance form goals.

Prerequisites

- SuccessFactors Performance Management v12 Acceleration
- Role-based permissions to access Performance Management.
- Role-based permissions to access Continuous Performance Management.
- You've granted users with the [View](#) permission of [Achievement](#) under [User Permissions](#) for [Continuous Performance Management](#) in [Manage Permission Roles](#).
- Goal Management and/or Career Development planning is enabled.

Context

Performance Management is part of the SAP SuccessFactors Performance & Goals bundle of applications. Using Performance Management, employees and managers work together to assess employees' work performance, including their goal achievements and competencies. By integrating with Continuous Performance Management

achievements and feedback on the achievement can be created and shared automatically with the performance form.

- If the [Activity](#) is marked as an [Achievement](#), then the [Feedback](#) can be displayed under the [Achievement](#) tab in the performance form.
- Only [Feedback](#) linked to activities marked as an [Achievement](#) will display in the performance form.

For an [Achievement](#) to display in the goal section of the performance form, the following criteria must be met:

- The system default [Goal Plan](#) must be linked to the goal section of the [Performance Form Template](#).
- The [Achievements](#) tabs must be enabled in the [Form Template Settings](#).
- The activity from which the [Achievement](#) was created MUST be linked to a goal from the default goal plan.
- The [Achievement](#) creation date must be within the start and end dates selected for the performance form. For example, a [Performance Goals](#) form begins 1 July and ends in 31 July. If an achievement for the goal is dated 1 August, then that achievement isn't included in the form.

For the [Feedback](#) to display in the goal section of the performance form of the [Performance Form Template](#), all of the previous criteria for showing the [Achievement](#) must be met as well as these additional settings:

- The [Display Achievements Feedback for Performance/Development Goal Achievements](#) must be enabled in [Form Template Settings](#).
- The [Feedback](#) must be linked to an [Activity that](#) has been marked as [Achievement](#).

Note

The linking of the [Activity](#) to the [Goal](#) is dynamic on the [Performance Form](#). If the link to the goal is removed from the [Activity](#) (from which the [Achievement](#) is created), that achievement is no longer shown in the [Achievements](#) tab for that goal.

Note

Achievements and Feedback aren't shown in the Performance Form PDF/Print Views. As a work-around, using the browser print to PDF options does show the Achievements and Feedback.

Procedure

1. Go to  [Admin Center](#)  [Tools](#)  [Form Template Settings](#)  and select these performance form templates to integrate settings:
 - a. [Enable Achievements tab in Performance Goal Section](#)
 - b. [Display Achievement Feedback for Performance Goal Achievements](#)
 - c. [Enable Achievements tab in Development Goal Section](#)
 - d. [Display Achievement Feedback for Development Goal Achievements](#)
2. 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 permission to view your achievements.

Related Information

[Managing the Performance Form After it is Launched](#)

8.3 Integrating with the Career Development Plan

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

Prerequisites

- 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.

8.4 Integrating with Compensation

You can link achievements to a Compensation template.

Prerequisites

- 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 .
2. Select a [Compensation Plan](#) template.
3. Go to , and select [Allow access to the 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.

8.5 Integrating with Calibration

The achievements that are created from Continuous Performance Management can show in Calibration sessions.

Prerequisites

- 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.

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.

8.6 Integrating with Talent Intelligence Hub

You can enable Talent Intelligence Hub to use AI-assisted capabilities to recommend relevant skills for your employees' Growth Portfolios. These recommendations are based on data from your employees' activities, achievements, and feedback in Continuous Performance Management.

Prerequisites

- You've purchased the AI units. For more information, please contact your Account Executive.
- You've implemented Continuous Performance Management.
- You've implemented Talent Intelligence Hub and have enabled the Growth Portfolio.
- You have the ► [Administrator Permissions](#) ► [Manage AI Capabilities](#) ► [AI Services Administration](#) ► permission.
- Employees must have the set of permissions to access Continuous Performance and Continuous Feedback, as well as permissions for activities, achievements, and feedback for that data to be shared with the Talent Intelligence Hub.

Procedure

1. Go to [AI Services Administration](#) admin page. In the Talent Intelligence Hub section, enable the [Assisted Skill Recommendations Using Continuous Performance Management Data](#) setting.
2. Grant employees the ► [User Permissions](#) ► [AI Access](#) ► [Assisted Skill Recommendations Using Continuous Performance Management Data](#) ►, so that they can receive skill recommendations based on their own activities, achievements, and feedback data.

Related Information

[Recommending Skills Based on Continuous Performance Management Data](#)

8.7 Continuous Performance Management on the Home Page

Continuous Performance Management is part of SAP SuccessFactors Performance & Goals and includes the following content on the 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.	- Latest - Icon in toolbar - Legacy - Tile in Quick Actions section	Always shown, based on system configuration and user permission. Once the Create Activity quick action is enabled, it's visible to all users, regardless of whether they have Edit activity permission granted to them. Note If a user doesn't have the Edit activity permission, but tries to create an activity on the home page card, they won't be able to save the activity	- Continuous Performance Management is enabled. - You have Access Continuous Performance Data permission. - You have View and Edit Activity permissions. - It's enabled in the Manage Home Page tool.	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	• Latest - Icon in toolbar • Legacy - Tile in Quick Actions section	Always shown, based on system configuration and user permission.	• Continuous Performance Management is enabled. • You have Limit about whom feedback can be requested permission. • You have Access Continuous Feedback Data permission. • You have Request feedback from others permission. • It's enabled in the Manage Home Page tool.	Yes
Give Feedback	Enables you to provide feedback to others directly from the home page.	• Latest - Icon in toolbar • Legacy - Tile in Quick Actions section	Always shown, based on system configuration and user permission.	• Continuous Performance Management is enabled. • You have Access Continuous Feedback Data permission. • You have Give Continuous Feedback permission. • It's enabled in the Manage Home Page tool.	Yes

Name	Description	Where Shown	When Shown	Prerequisites	On Mobile?
<i>Activity</i>	Displays any activities that have been updated recently. For example, if your manager adds a comment to an activity, it appears on the home page.	• Latest - <i>Needs Attention</i> • Legacy - <i>For You Today</i>	Appears when any comments are added to one of your activities Disappears when you view the update on the card or after 30 days, if no action is taken.	• Continuous Performance Management is enabled. • Intelligent Services is enabled.	Yes
<i>Feedback Request</i>	Alerts you to a request for providing feedback	• Latest - <i>Needs Attention</i> • Legacy - <i>For You Today</i>	Appears when someone requests you to provide feedback. Disappears when you take action to respond or when you decline the request on the card.	• You have Access Continuous Feedback Data permission. • You have Access Continuous Feedback Page permission. • You have Give Continuous Feedback permission. • The requester has Request Feedback from others permission. • The requester has Limit about whom feedback can be requested permission.	Yes (only appears in the latest Home screen.)

9 Integration with Other Applications

9.1 Integration with Microsoft 365

9.1.1 Continuous Performance Management Quick Actions in the SAP SuccessFactors App

Learn about Continuous Performance Management quick actions available through the SAP SuccessFactors app in Microsoft Teams.

Prerequisites

- You've enabled the SAP SuccessFactors app for Microsoft Teams.
- You have a Performance & Goals license.
- Continuous Performance Management is enabled.
- The corresponding quick action is enabled in both *Manage Home Page* and *Work Tech Configuration* admin tools.
- Users have the ► *User Permissions* ► *Continuous Performance Management User Permission* ► *Access Continuous Performance Data* ► and *Access Continuous Feedback Data* permissions.
- Users have the ► *User Permissions* ► *General User Permission* ► *User Search* ► permission and are included in the target population. The *Exclude granted users from having the same access to themselves* option must not be selected. The defaultLocale field must be configured in the user API.

Quick Actions

Name	Description	Additional Prerequisites
<i>Request Feedback</i>	Allows users to send feedback requests directly from Teams.	• The Continuous Feedback feature is enabled. • Users have the ► <i>User Permissions</i> ► <i>Continuous Performance Management User Permission</i> ► <i>Request feedback from others</i> ► permission.
<i>Give Feedback</i>	Allows users to provide feedback for others directly from Teams.	• The Continuous Feedback feature is enabled. • Users have the ► <i>User Permissions</i> ► <i>Continuous Performance Management User Permission</i> ► <i>Give Continuous Feedback</i> ► permission.

Name	Description	Additional Prerequisites
Create Activity	Allows users to create activities and link them to relevant performance or development goals.	- To link activities to performance or development goals: you've enabled the latest Goal Management or Development Goals. - Users have these permissions: - Permission to view and edit the item Activity under User Permissions > Continuous Performance Management > - Permission to view and edit the item Achievement under User Permissions > Continuous Performance Management > - To link activities to performance goals: User Permissions > Goals > Goal Management Access > - To link activities to development goals: User Permissions > Career Development Planning > Career Development Plan (CDP) Access Permission >

Important Notes

- [Create Activity](#) doesn't support multiple roles. Activities created in Teams only appear in a user's channel with their line manager.
- When using [Create Activity](#), users might be asked to log in to their SAP SuccessFactors account in Teams. The experience is consistent with your current SAP SuccessFactors authentication process in a web browser. The frequency at which users are asked to log in depends on their current IDP session timeout period.
- In delegated access scenarios, feedback can't be requested from or sent to users who haven't connected their accounts for user mapping in Teams.

Related Information

[Enabling the SAP SuccessFactors App for Microsoft Teams](#)

[How-To Video: Request and Give Feedback in Microsoft Teams](#)

[How-To Video: Create Activity in Microsoft Teams](#)

[Enabling Continuous Performance Management from the Admin Center](#)

[Configuring Continuous Feedback](#)

9.1.2 Continuous Performance Management Notification Cards in the SAP SuccessFactors App

Learn about Continuous Performance Management notification cards users can receive in Microsoft Teams.

Prerequisites

- You've enabled the SAP SuccessFactors app for Microsoft Teams.
- You have a Performance & Goals license.
- Continuous Performance Management is enabled.
- Users have the [User Permissions > General User Permission > User Search](#) permission and are included in the target population. The *Exclude granted users from having the same access to themselves* option must not be selected. The defaultLocale field must be configured in the user API.

Cards

Name	Description	When Received	Additional Prerequisites
Feedback Request	Displays the feedback requestor and feedback topic. Allows users to give feedback inside Teams.	Someone sends a feedback request to users.	The Continuous Feedback feature is enabled.
New Feedback	Displays the feedback provider and feedback topic. Allows users to view more details about the feedback inside Teams. Takes users to their SAP SuccessFactors system to check feedback details.	Someone provides feedback for users.	
Activities	Displays basic information about an activity that has been recently updated.	A manager adds comments to one of the users' activities.	N/A

Related Information

[Enabling the SAP SuccessFactors App for Microsoft Teams](#)

9.2 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

[Integrating SAP SuccessFactors with Qualtrics](#)

[In-App Survey Integrations for Continuous Performance Management](#)

10 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 HCM suite. Please refer to the central guide for details.

📘 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 each 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](#)

11 Data Extraction Options for Continuous Performance Management

Details of the options for exporting or extracting data and forms from Continuous Performance Management.

Overview

- You're responsible for exporting all data, setting filter parameters, processes, users reporting permission, and validating that the export contains the required information.
- The user exporting data must have full reporting permissions for all of the divisions departments, locations, and so on, to ensure all of the information is included in the report.
- To generate reports, permission access to the [Reports](#) module is required. Follow the steps described in the topic [Permissions Required for Using Story Reports](#) to assign the necessary permissions for reporting.
- The reporting functionality is designed to be used for human readable content and shouldn't be used for data dumps.
- Some reports may not export data for inactive users.
- System performance issues occur when huge amounts of data are processed. Run those kinds of reports outside of business hours of the region where the SAP SuccessFactors data center is located.
- Sometimes it is necessary to breakdown reports by year, division, department, and so on for an exported spreadsheet to successfully download.
- Very large output files are difficult for a user's local computer to handle.

Extended User Information

It's possible to export the [Extended User Information](#), which consists of supplemental data about users in your SAP SuccessFactors system. This information is beyond the basic user information such as name, job title, and department. Extended user information includes personal information, rating data (Performance, Potential, Competency, Objective) and background information. For more information on this topic and for a detailed procedure on how to export the [Extended User Data](#), refer to [Exporting Extended User Information](#).

Reports

You can track details such as the list of completed activities, achievements year to date, and total number of 1:1 meetings between employee and manager. To run a report on Continuous Performance Management, refer to [Enabling Story Reports](#).

OData and REST APIs

APIs enable you to review, create, update, and delete operations for the Continuous Performance Management related entities. For more information, refer to the topic [ContinuousFeedback.svc](#) and the topic [Continuous Performance Management APIs to Support Activities and Achievements \[page 86\]](#). Technical information can also be found on the **SAP Business Accelerator Hub**.

Related Information

[SAP Business Accelerator Hub for SuccessFactors APIs](#) 
[Schema Joins Available for Story Reports](#)

Change History

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

1H 2026

Type of Change	Description	More Info
Changed	We deleted information about the Feedback Requests notification on the To-Do Panel, as this feature is no longer available as of 1H 2026. There is already a replacement feature on the Home Page cards.	
Changed	New tokens are available for use in Continuous Feedback email notifications.	Enabling Feedback and Feedback Response Emails [page 78] Enabling Feedback Request Emails [page 80]
Changed	AI-assisted writing is available on Continuous Feedback screens in mobile apps.	AI-Assisted Writing in Continuous Performance Management [page 75]
New	You can configure the landing tab of the Activities page for all users in your instance.	Setting Landing Tab for Activities View [page 23]
New	We added a topic about requesting feedback on the activity details page.	Requesting Feedback on Activities [page 56]
Changed	We made user experience enhancements to the workflows of requesting and providing feedback.	Giving Feedback [page 70] Requesting Feedback [page 71] Requesting Feedback on Activities [page 56]
Changed	We made enhancements to the meeting and meeting history user experience.	Meeting View [page 62]
Changed	We added a permission ► User Permissions ► Continuous Performance Management User Permission ► Edit Discussion Topics and Meeting Notes in Meeting History ►.	Role-Based Permissions for Continuous Performance Management [page 15]

Type of Change	Description	More Info
Changed	We added three feature settings in the <i>Continuous Performance Management Configuration</i> tool. • <i>Enable Managers to View All Feedback for Direct Reports</i> • <i>Enable User-Controlled Goal Visibility in Feedback Requests</i> • <i>Include Inactive User Data in Story Reports</i>	Enabling Features in Continuous Performance Management [page 27]

2H 2025

Type of Change	Description	More Info
January 16, 2026		
Changed	If you're a manager, the <i>Suggested People</i> list in the <i>Give Feedback</i> dialog includes up to five randomly selected direct reports who are part of your role's target population. If you don't have direct reports, suggestions are randomly selected from your peers.	Giving Feedback [page 70]
November 21, 2025		
Changed	In the <i>Give Feedback</i> dialog, users can be selected as feedback receivers only when they have been granted the <i>User Permissions</i> > <i>Continuous Performance Management User Permission</i> > <i>Access Continuous Feedback Data</i> and <i>Access Continuous Feedback Page</i> permissions.	Giving Feedback [page 70]
October 3, 2025		
Changed	The AI-assisted writing tool is available in more text areas in Continuous Performance Management.	AI-Assisted Writing in Continuous Performance Management [page 75]
Changed	We now provide activity search support in the <i>Feedback Details</i> page.	Continuous Feedback [page 66]
New	Users can share their activities across multiple channels that they participate in, if the feature setting <i>Enable Cross-Channel Activity Sharing</i> is enabled in <i>Continuous Performance Management Configuration</i> tool.	Sharing Activities Across Channels [page 55] Enabling Features in Continuous Performance Management [page 27]

Type of Change	Description	More Info
New	We added two new topics to provide more details about how to provide and request continuous feedback.	Giving Feedback [page 70] Requesting Feedback [page 71]
Changed	All Continuous Performance Management fields consistently use character counts.	Continuous Performance Management Overview [page 4]
Changed	An employee's Continuous Performance Management data can be transferred from their inactive employment to their active employment in instances that have enabled Employee Central.	Impact of Multiple Employment on Continuous Performance Management [page 42]

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