Typographic Conventions

<table>
<thead>
<tr>
<th>Type Style</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Example</strong></td>
<td>Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Textual cross-references to other documents.</td>
</tr>
<tr>
<td><strong>Example</strong></td>
<td>Emphasized words or expressions.</td>
</tr>
<tr>
<td><strong>EXAMPLE</strong></td>
<td>Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.</td>
</tr>
<tr>
<td><strong>Example</strong></td>
<td>Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.</td>
</tr>
<tr>
<td><strong>Example</strong></td>
<td>Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.</td>
</tr>
<tr>
<td><code>&lt;Example&gt;</code></td>
<td>Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.</td>
</tr>
<tr>
<td><code>EXAMPLE</code></td>
<td>Keys on the keyboard, for example, F2 or ENTER.</td>
</tr>
</tbody>
</table>
Document History

Q1 2016

Table 1: The following table summarizes changes to this guide.

<table>
<thead>
<tr>
<th>What's New</th>
<th>Description</th>
<th>More Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Added content to section 2.3.2</td>
<td>Updated the section procedure to include selection of 'Admin access to MDF OData API' permission</td>
<td>Enabling Role-Based Permissions</td>
</tr>
<tr>
<td>First Release of Continuous Performance Management</td>
<td>This guide provides information on configuring and using Continuous Performance Management.</td>
<td>What is Continuous Performance Management?</td>
</tr>
</tbody>
</table>
# Table of Contents

1. **What is Continuous Performance Management?** ................................................................. 6

2. **Enabling Continuous Performance Management** .......................................................... 7
   2.1 Provisioning Opt-in ............................................................................................................... 7
   2.2 Initializing CPM .................................................................................................................... 7
      2.2.1 Enabling Permissions for MDF File Initialization ......................................................... 7
      2.2.2 Initializing the MDF files ............................................................................................ 8
   2.3 Enabling Roles-Based Permissions ..................................................................................... 8
      2.3.1 Creating User Groups .................................................................................................. 9
      2.3.2 Enabling Role-Based Permissions .............................................................................. 9
   2.4 Setting Up the Mobile Application for CPM ...................................................................... 14
      2.4.1 Adding a New Profile in the Mobile Application ...................................................... 16

3. **Configuring CPM for Use** .................................................................................................... 21
   3.1 1:1 Meeting Configuration .................................................................................................. 21
   3.2 Notification Configuration ................................................................................................... 22

4. **Using Continuous Performance Management** ................................................................... 23

5. **1:1 Meeting View** ................................................................................................................ 24
   5.1 Activity ................................................................................................................................. 26
      5.1.1 Adding an Activity ...................................................................................................... 26
      5.1.2 Adding Comments with Flags ................................................................................... 27
      5.1.3 Adding Achievements ................................................................................................. 27
   5.2 Topics ................................................................................................................................... 28
   5.3 Applying Filters to Activities and Topics ........................................................................... 28
   5.4 Manager’s Access to 1:1 Meeting View of Employees ....................................................... 29
   5.5 Coaching ............................................................................................................................. 30
   5.6 End 1:1 Meeting .................................................................................................................. 31
   5.7 Viewing Content from Past Meetings within the Solution .................................................. 31
   5.8 Notifications ....................................................................................................................... 31

6. **Annual Summary View** ....................................................................................................... 33
   6.1 Adding Achievements ......................................................................................................... 35
   6.2 Manager’s Access to Annual Summary View of Employees .............................................. 35

7. **Ad-hoc Reporting** ................................................................................................................. 37
   7.1 Configuring the Reports module ........................................................................................ 37
   7.2 Creating an Ad-hoc report ................................................................................................... 37
7.3  Applying Filters to Ad-hoc Reports ................................................................. 40

8   Integration with Goal Management .................................................................. 44
# What is Continuous Performance Management?

Performance is not something measured once a year. To truly impact performance positively, employees and managers should have regular check-ins to ensure employees are working on the right things in the right way. Continuous Performance Management (CPM) is a solution that enables you to get quick feedback on your work through frequent and structured conversations with your manager. As a manager, it helps you track your team members' progress effortlessly and offers you a simple way to provide coaching advice.

Key features of Continuous Performance Management:

- **Better tracking of things you work on**: Capture and track your activities and achievements in real-time to let your manager get a better visibility of what you are working on.

- **Structured and meaningful one-on-one discussions**: The list of all your activities and achievements are available in the application. It guides your conversation with your manager, making sure all the important topics are discussed, and helps you focus on ways to improve your future performance.

- **Links activities to your Goal Plan**: The Continuous Performance Management feature is integrated with Goal Management, so you can be sure that your work is always aligned to your performance objectives.

- **Helps you coach your team members**: Coaching also plays a big role in improving employees' performance. As a manager, you can use the feature to coach your employees and boost their professional growth.

## 1.1 About this Document

This guide provides a complete, step-by-step approach to how you can configure the Continuous Performance Management solution in the application. The guide also provides detailed explanation for using the Continuous Performance Management solution.
2 Enabling Continuous Performance Management

CPM is technically a Provisioning Opt-in feature. Once CPM is enabled in your application instance, you can then set it up for use via the Admin center. The CPM setup involves Metadata Framework (MDF) file initialization, assignment of role-based permissions, and configuration of the mobile application.

2.1 Provisioning Opt-in

Contact Cloud Product support to enable the 'Enable Continuous Performance Management' switch in Provisioning, which also involves enabling the switches - 'Enable Generic Objects', 'Role-based Permission' and 'Enable the Attachment Manager' in Provisioning.

Note

Enabling the 'Role BasedPermission' switch will disable your Admin domains.

2.2 Initializing CPM

CPM has been designed using a platform known as 'Metadata Framework' or MDF. In order to use the solution, you must first import the MDF entity files to ensure that you can appropriately use functions such as selecting 'activity status' values, flagging a comment, or triggering notifications. The MDF files are essentially loaded to support the application. It is important to note that you must have the permissions for the 'Import and Export Data' and 'OData API Metadata Refresh and Export' views to load the MDF files. If not, enable the access permissions before you proceed.

2.2.1 Enabling Permissions for MDF File Initialization

Check your Admin role permissions, and ensure that data import and Export, and OData API Metadata Refresh and Export permissions are enabled.

Procedure

1. Launch the application, and log in as Admin, and navigate to Admin Center.
2. In the Tool Search field, search for Manage Permission Roles. The Permission Role List page appears.
3. Select the Admin role. The Permission Role Detail page appears.
4. Under Permission settings, click Permission. The Permission settings dialog box appears.
5. Under User Permission, select the data import, export, and refresh permissions:
   o Click Metadata Framework and select the check boxes for Manage Data and Import Permissions on Metadata Framework.
   o Click Manage Integration Tools and select Access to OData API Metadata Refresh and Export.
6. Click Done and Save Changes.
You have successfully enabled the permissions needed to initialize the MDF file.

2.2.2 Initializing the MDF files

After you ensure that your Admin role has the necessary permissions, you can proceed with loading the MDF files.

Procedure

1. Navigate to the Admin Center page. The CSV files are pre-loaded in Success Store.
2. In the Tool Search field, search for Import and Export Data. The Import and Export Data page appears.
3. From the drop-down menu, select Import Data, select Success Store.
4. Select Continuous Performance Activity Priority and click Import. A confirmation message appears.
5. Repeat the previous step and import Continuous Performance Activity State, Continuous Performance Continuous Performance Activity Status, Continuous Performance Feedback Flag, Continuous Performance Other Topic Status, and Continuous Performance Notifications.
6. Refresh the API metadata in your instance - in the Tool Search field, search for OData API Metadata Refresh And Export and on the page, and click Refresh.
The MDF files have been successfully initialized in your application instance.

2.3 Enabling Roles-Based Permissions

Once the MDF files have been initialized, the next step is to identify the users you want to provide access to and then enable the role-based permissions required for accessing CPM.
2.3.1 Creating User Groups

Identify the users to whom you want to provide CPM access. You can either use an existing user group or create a new user group for granting the permissions needed for accessing CPM. Here's how you can create a new user group for CPM.

Procedure

1. Navigate to the Admin Center page.
2. In the Tool Search field, search for Manage Permission Groups. The Manage Permission Groups page appears.
3. Click Create New. The Permission Group dialog box appears.
4. Under the Definition tab, enter a relevant Group Name.
5. Create People Pool (add categories to narrow down your selection) under Choose Group Members and Exclude these people from the group sections, either to add or to remove users from the group, and then click Done.

Example

If you need users only from the 'Talent Management' department of your US office, here's how you create your user group - In People Pool under the Choose Group Members section, select Country in the drop-down list and in the Search Results dialog box, search and select USA, and click Done. Next, for including users only from Talent Management department, click Add another category, select Department, and in the Search Results dialog box, search and select Talent Management and then click Done. Likewise, you can create multiple People Pools with users from multiple categories, either to include or to exclude the members from your user group.

You can create one or more user groups as needed, and grant them CPM access.

Note

If you want to know the total number of users in a group, check the corresponding Active Membership field.

2.3.2 Enabling Role-Based Permissions

The final step is to enable the role-based permissions that you need for accessing CPM. Again, you can either use an existing role or create a new role, enable all the CPM access-related permissions, and associate the role with the CPM user groups.

Note

Some permissions may only be applicable to administrators and/or manager role.
Procedure

1. Navigate to the Admin Center page.
2. In the Tool Search field, search for Manage Permission Roles. The Permission Role List page appears.
3. Click Create New and on the Permission Role Detail page, enter Role Name, and under Permission settings, click Permission.

5. Scroll down to Administrator Permissions, click Metadata Framework, and select Read/Write Permission on Metadata Framework and Admin access to MDF OData API.

Note

The permission for Admin access to MDF OData API must be enabled for both employee and manager roles to ensure that the Edit and Delete buttons are available while using Continuous Performance Management via the Web client.
6. Then, scroll up and click Continuous Performance Management, and select Access to Continuous Performance Management.

7. Only for administrators: select Access to Administrative Configuration Page as well.
8. **Only for managers:** under **User Permissions**, click **General User Permission**, and select **Organization Chart Navigation Permission**.

9. Click **Done**. You have enabled all the permissions needed to access CPM.

10. Next, associate the role-based permission with a corresponding user group - on the **Permission Role Detail** page, scroll down to the **Grant this role to** section and click the **Edit Granting** link of the user group.

    **Note**

    If you do not find an existing permission or user group, then click **Add**.
11. On the **Grant this role to** dialog box, select **Permission Group** from the dropdown list and then click **Select**.

12. On the **Groups** dialog box, select the corresponding user group, and click **Done**.

13. On the **Grant this role to** dialog box, click **Done**, and on the **Permission Role List** page, click **Save Changes**.
You have successfully enabled the permissions required for accessing the CPM solution and associated the permissions the user groups (employees and their managers) need for accessing CPM. You will now find 'Continuous Performance' in the main navigation drop-down list.

2.4 Setting Up the Mobile Application for CPM

Now that you have enabled the CPM feature in your application, you are a few steps away from accessing it on your SAP SuccessFactors mobile application for iOS (version 8.0 and above) or Android (version 4.0 and above). If you do not have the mobile application yet, you can download its latest version from iTunes or Google Play, respectively.

Then all you need to do is turn on the org chart and continuous performance options via the Admin center, and enable mobile access for your role using role-based permissions.

Enabling org chart and continuous performance options for your mobile app:

1. Navigate to the Admin Center page.
2. In the Tool Search field, search for Enable Mobile Features. The Enable Mobile Features tab on the Mobile Settings page appears.
3. In the Mobile Specific section, under Mobile Features, select Org Chart, and on the Confirmation pop-up window, click Turn On.
4. Next, in the Modules section, under Talent, select Goals and Continuous Performance, and on the Confirmation pop-up window, click Turn On.
5. Click Save Changes.

You've successfully enabled the mobile features for your profile.
Enabling mobile access for your role:

1. Navigate to the Admin Center page.
2. In the Tool Search field, search for Manage Permission Roles. The Permission Role List page appears.
3. Click a permission role for which you enabled CPM. The Permission Role Detail page appears.
4. Under Permission settings, click Permission. The Permission settings dialog box appears.
6. **Only for managers:** to view the 'Team' tab in the mobile application, select Organization Chart Navigation Permission as well.
7. Click Done, and on the Permission Role Detail page, click Save Changes.

You can now access the CPM feature on your mobile app. It appears as a Continuous Performance tile when you launch the mobile app.

### Note

**For managers:** If you are not able to view the 'Team' tab in your mobile application, a possible reason could be that the Provisioning option 'Limit org chart access to succession org chart users' is enabled for your application instance. If so, you can

- Either go to Admin Center > Manage Permission Roles > Permission > User Permissions > Succession Planners, and select Succession Org Chart Permission.
2.4.1 Adding a New Profile in the Mobile Application

The SAP SuccessFactors mobile application enables you to create and store multiple profiles on your mobile application, which means you can log in to your mobile application as a different user, without removing your existing profile from the application.

PS: The ability of adding multiple profiles on the mobile application is particularly useful if you are interested in testing the CPM solution in a Preview environment, while preserving your existing profile that may be tied to your Production instance.

Procedure

Adding an additional profile to your mobile application:

1. Launch the SAP SuccessFactors mobile app, and tap More.
2. Tap Settings, and enable Multiple Profiles.

⚠️ Caution

Do not enable Shared Device.

3. On the top-left corner of the app, tap More, and tap Sign Out. The Multiple Profiles screen appears.
4. Select your existing profile, and on the top-left corner of the screen tap Edit, add a nickname to distinguish your current profile and tap Save.

5. On the Multiple Profiles screen, tap Add Profile. An activation code appears on the Activate screen. Now, leave the mobile app at this screen, and perform the web application-related steps.
6. Next, you need to activate the new profile - launch the web application, and log in using the profile you want to add to your mobile application.

*Note*

If you are testing the CPM solution on a Preview environment, and you need to add your preview environment’s profile in the mobile application, then launch the Preview instance (as provided by your HR) of the application.

7. On the top-right corner of the screen, click your username, and select *Options*.

![Options page](image)

8. On the *Options* page, click the *Mobile* tab, enter the *Activation code* as it appears on your mobile device (see Step 5), and click *Save*.

9. Come back to your mobile application and complete the profile addition - under the activation code, tap *Activate*.
10. On the **User License** screen, only if you agree to the license terms and the data privacy terms, then select both the options, and tap **I Accept**.

A new profile has been added on your mobile application. You can add a nickname to your new profile. To toggle between multiple profiles, sign out from one profile and sign in to the other.
3 Configuring CPM for Use

Using the administrative console (the 'Continuous Performance Management Configuration' page), you can configure various items under 1:1 Meetings and Notifications. To open the administrative console, navigate to the Admin Center page, and in the Tools Search field, search for Continuous Performance Management. As noted in the earlier section, this administrative console is controlled by role-based permissions and only those with an Admin role should be given access.

### 3.1 1:1 Meeting Configuration

Under the **1:1 Meetings** section, you can configure the label for activity status and other topic, the icon color for the activity status and the flag color for comments.

You can configure the following items for 1:1 Meetings:

- Change the default Label for *Activity Status* and *Other Topic*.
- Click **Localize** and you can update the **Label** in different languages.
- Under **Icon Color** or **Comment Flag Color**, click the **Color Palette** icon to customize the color corresponding to each activity status and the comment flag color.
3.2 Notification Configuration

Currently, in CPM, you have two conditions that trigger notifications. The first condition is that you, as an employee, have not updated your 1:1 meeting view within a defined number of days. The second condition is that you, as a manager, have not met with employee(s) reporting to you within a defined number of days. You can configure the conditions using the administrative console. Once triggered, you will receive notifications both in your mobile app and on the web application (the 'To Do' tile on your home page).

Configuring notifications in your application instance:

- Select the check box to trigger notification to employee if the number of days since the last 1:1 meeting update is equal to or greater than the field value. You can set the field value.
- Select the check box to trigger notification to manager if the number of days since the last 1:1 meeting with employee is equal to or greater than the field value. You can set the field value.

**Note**

For the number of days, you must set a value either equal to or greater than 1. Negative or decimal numbers are not permitted.
4 Using Continuous Performance Management

CPM consists of two main views - the 1:1 Meeting view and the Annual Summary view. The 1:1 meeting view allows you to surface the key activities you are working on, create topics you wish to discuss with your manager, and receive coaching advice from your direct manager. The Annual Summary view allows you to capture your most celebrated achievements in real-time.

Primary features and functions associated with Continuous Performance:

- Create activities to instantly record your efforts, and provide visibility into what you are working on
- Capture your achievements in real-time, using the 'Annual Summary' view or by tagging them as an 'Achievement' in 'Activities' under the '1:1 Meeting' view
- Link your activities and achievements directly to the performance goals in your default performance goal plan
- Structure your 1:1 meetings - with your manager or with the employees reporting to you
- Trigger notifications if your 1:1 meetings have not occurred or employees reporting to you haven’t updated their status, over a period set by you
- Create topics for discussion in 1:1 meetings that could be outside of what you are working on, but is important to the overall engagement
- If you've been recently transferred in as the manager of a team, you get access to the employees' existing and previous 1:1 meetings
- Provide coaching advice to the employees reporting to you
- End the 1:1 meetings after your discussions, and track the entire content of the meeting in meeting history
- In the Annual Summary view, view your achievements grouped by time or by goal
- Generate reports with ad-hoc reporting
- Access the feature via the web, and on your mobile application (iOS and Android)
5  1:1 Meeting View

Most of the actions in CPM are performed in the 1:1 meeting view. As employees, you can create activities, assign a status for the activities, and link the activities to your performance goals. In addition, you or your manager can add comments to your activities and flag the comments which are deemed important. You can also use comments to add achievements to your activities that have a long duration, by tagging the comment as an achievement.

The 1:1 meeting does not always need to revolve only around things you are working on. Your performance and professional engagement also depend on discussing topics that may or may not be within the boundaries of your role. You can surface such topics for discussion during a 1:1 meetings using ‘Topics’ in CPM. At the conclusion of a 1:1 meeting, you or your manager can end the meeting in the application and capture a snapshot of the contents of the entire meeting. You and your manager can view the history of your meetings at any time for reference.

The final dimension to the 1:1 meeting view is coaching. Your manager can add one thing you did well and one thing you can improve upon to help keep you performing better.

Accessing your 1:1 Meeting view via the web application:

- Log in to the web application, and navigate to the Continuous Performance module. Your 1:1 Meeting view appears.
Accessing your 1:1 Meeting view via the mobile application:

1. Launch the SAP SuccessFactors application.

2. On the Me tab, tap the Continuous Performance tile. Your 1:1 Meeting view appears.
5.1 Activity

You can create an activity to record the things that you are working on. Activities can be personal to you, and they can be easily linked to one of your performance goals. For example, you might be working on a big presentation to land a new client or contract. That activity might very well have relevance to your performance goal of increasing revenue for the company by some percentage. The things you are working on may or may not be related to a goal. It only depends on the activity.

5.1.1 Adding an Activity

You can create an activity using the 1:1 Meeting view, and link your activities to your goals in your default goal plan.

1. Note
   Set your performance goal plan permissions, considering the fact that your CPM related permissions are enabled. Only then, you will be able to properly link your activities to the goals in your default goal plan.

Creating an activity from the mobile application, or via the web:

1. On the 1:1 Meeting view screen, tap/click the Activities tab.
2. Tap/click the add icon.
3. Enter an activity name.
4. Select an activity status from the dropdown list.
   - High: the activity is a high priority item, something you must attend to immediately
   - Medium: the activity is a priority but it could wait a day or two
   - Low: the activity should be taken up as and when you have time for it
   - Paused: the activity is currently on hold
   - Cancelled: the activity is no longer being worked upon, but the details are preserved
   - Complete: the activity has been successfully completed
5. Link your activity to one of your performance goals from your default goal plan.
6. Tap/click Create.

You have successfully created an activity in the 1:1 Meeting view. You can edit or delete the activities.

1. Note
   Currently, only you can add activities in your profile. Your manager can view and add comments to the activities you create, but your manager cannot create activities on your behalf.
5.1.2 Adding Comments with Flags

Whether you are an employee or a manager, you can use Comments to exchange ideas on an activity via the application. Users may also flag the comments to signify their importance.

Adding comments to an activity from the mobile application, or via the web:
1. On the 1:1 Meeting view screen, tap/click the Activities tab.
2. Under an activity, tap/click the Add Comment link.
3. Enter your comment in the Add Comment text box.
4. If your comment is significant, then tap/click the flag icon to flag your comment.
5. Tap/click Save.

The comment appears under the activity. You can edit or delete the comment, remove the flag, or change the color of the flag as described in section 3.1:1 Meeting Configuration.

5.1.3 Adding Achievements

Within the comments in 1:1 Meeting view, you can also add your achievements, in a similar way you add a comment. This feature may be used in cases where you have an activity with a long duration, and you have achievements that occur throughout the lifespan of that single activity. This allows you keep the activity ‘active’ while continuing to link achievements to it. The achievements you added in 1:1 meeting view are also visible in the Annual Summary view.

Adding achievements to an activity from the mobile application, or via the web:
1. On the 1:1 Meeting view screen, tap/click the Activities tab.
2. Under an activity, tap/click the Add Comment link.
3. Enter details of your achievement in the Add Comment text box.
4. Tap/click the achievement icon to mark the comment as an achievement.
5. Tap/click Save.

The achievement appears as a comment under the activity. You can edit or delete achievements.
5.2 Topics

Sometimes you may need to discuss with your manager, things that are beyond the scope of your current activities. In addition, there may be things that can help you as an employee to do your job better—like needing that ergonomically correct chair to support your posture or the need to discuss working more flexible hours. Regardless of what it is, these are things that you need to talk to your manager about, and such things are captured under Topics.

Creating Topics in 1:1 Meeting view from the mobile application, or via the web:

1. On the 1:1 Meeting view, tap/click the Topics tab.
2. Tap/click the icon.
3. Add Topic Name.
4. Select a status:
   a. Open: Topic is open and needs to be resolved
   b. Closed: You have discussed it with your manager, and it is resolved
5. Tap/click Save.

You have successfully created a topic for discussion for your upcoming 1:1 meeting with your manager. You can edit or delete the topics you add.

Note
Currently, only you can add topics that you wish to discuss with your manager. Your manager can view or add comments to the topics you create, but your manager cannot add topics on your behalf.

5.3 Applying Filters to Activities and Topics

The Filter in CPM helps you refine your search based on the status of the activities or the topics that you consider.

- If you apply Filter on the Activities tab, you can refine your search depending on the activity statuses you select from: High, Medium, Low, Paused, Cancelled, and Complete.
- If you apply Filter on the Topics tab, you can refine your search depending on the topic statuses you select from: Open, Closed, and Achievement.

Applying a filter in your search:

1. On the Activities tab or on the Topics tab, tap/click the filter icon.
2. On the pop-up window, select the filter check boxes you want to include, and click OK.

Filtered activity or topic records will appear.
5.4 Manager’s Access to 1:1 Meeting View of Employees

As a manager, CPM helps you gain immediate visibility into what your employees are working on and the topics that they need to discuss during a one-on-one meeting. With this visibility, you can conduct more structured, efficient, and well-informed one-on-one meetings - to ultimately help your employees perform better over time.

Accessing employee’s 1:1 Meeting view via the web application (Home page v12 / Home page v3):

1. Log in to the web application, and navigate to the Home page.
2. For Home page v12 under My Team, click the team member you want to view; and for Home page v3, under My Team, within the Manage My Team tile, click the team member you want to view.

3. For Home page v12, the tile flips to display the employee’s details, and click Actions; and for Home page v3, on the pop-up window with employee details, click Take Action.

Note

For Home page v3, the My Team pop-up window also provides you a summary of the activities, the employee is working on.
4. Click **1:1 Meeting**.

The 1:1 Meeting view of the selected employee appears.

**Accessing employee’s 1:1 Meeting view via the mobile application:**

1. Launch the SAP SuccessFactors application.
2. Tap the **Team** tab at the bottom of the app.
3. Swipe left for the member of your team you want to view.
4. Tap the **Take Action** button, and select the **1:1 Meeting** view.

The 1:1 Meeting view of the selected employee appears.

**Tasks you can perform on your employees 1:1 Meeting view:**

- Under the **Activities** tab, you can view the activities the employee has been working on, along with the comments and achievements that have been linked to the activities. You can also add comments as described in section 5.1.2 Adding Comments with Flags.
- Under the **Topics** tab, you can view the topics your employee wants to discuss with you in the upcoming 1:1 discussion.
- Under the **Coaching** tab, you can provide coaching advice to your employee as explained in section 5.5 Coaching.

### 5.5 Coaching

Timely guidance and feedback from managers can greatly improve the performance of the employees. As a manager, Coaching in CPM offers a simple framework for you to provide constructive feedback or advice to your employees, which motivates them and helps them improve at their job.
Adding Coaching advice for an employee reporting to you from the mobile application, or via the web:

1. Navigate to the 1:1 Meeting view screen of the employee you want to view, and tap/click the Coaching tab.
2. Enter one thing that the employee did well.
3. Enter one thing that the employee can improve.
4. Tap/click outside the text box to save your changes.

You have successfully added coaching advice for your employee.

5.6 End 1:1 Meeting

Once you and your manager have completed your 1:1 meeting, one of you can end the meeting by clicking or tapping the End 1:1 Meeting button. Once you end the meeting, CPM takes a snapshot of the content from the meeting as it appeared during your discussion. If at any time in the future you or your manager want to revisit the content of your meeting or your points of discussion, you can do it with ease.

Ending the meeting is also considered a confirmation that the meeting occurred. Thus, each time you log into the SAP SuccessFactors app, you will see the number of days since your last 1:1 meeting.

5.7 Viewing Content from Past Meetings within the Solution

Continuous Performance Management allows you to quickly review content from all your past meetings - as far back as the previous month. All you need to do is click/tap the history icon, and click/tap the meeting details you want to review. A snapshot of your selected 1:1 meeting appears. Tap/click Close to exit the past meeting record.

In case you want to access specific meeting content from time periods beyond the previous month, you can use Ad-hoc reporting.

5.8 Notifications

Once you configure the CPM notifications using the Continuous Performance Management Configuration page, you will be notified about your pending tasks on the web application and on your mobile application.

Here’s an example on how the ‘To Do’ section of your Home page, on the web application, displays the notification for your pending tasks:
6 Annual Summary View

The Annual Summary view lets you quickly and easily capture the things you, as employees, have achieved in your workplace. Traditionally, you had to wait until the end of the year to record all of the things you’ve done to justify any request for a merit increase or promotion. With this view, you can capture your achievements when they actually occur—in real time!

Accessing your Annual Summary view via the web application:
1. Log in to the web application, and navigate to the Continuous Performance module.
2. Click the Annual Summary tab.

Accessing your Annual Summary view via the mobile application:
1. Launch the SAP SuccessFactors application.
2. On the Me tab, tap the Continuous Performance tile.
3. Tap the menu toggle icon on the upper-right corner of the app, and tap Annual Summary. Your Annual Summary view appears.
The Annual Summary view groups your achievements, by time and by performance goal, which allows your manager to see the number of your achievements that are directly linked to goals, and the number of achievements you accumulate each month.

### 6.1 Adding Achievements

You can add achievements to your activities in 1:1 Meeting view. However, you may also have achievements that have no relationship to your activities. For example, you may volunteer to do something as part of a corporate initiative around volunteerism, or you might have stepped in at the last minute to close a sales deal. Such participation may not be noted as an activity, but it certainly can count as an achievement.

Adding achievements in Annual Summary view from the mobile application, or via the web:

1. On the Annual Summary view, tap/click the add icon.
2. In the Achievement Name text box, describe your achievement.
3. Select the Achievement Date.
4. Link to an activity (if relevant).
5. Tap/click Save.

You have successfully added an achievement in the Annual Summary view.

### 6.2 Manager’s Access to Annual Summary View of Employees

As a manager, you can currently use the Annual Summary view to see the achievements of the employees reporting to you, and add your comments to the achievements.

Accessing an employee’s Annual Summary view via the web application (Home page v12 / Home page v3):

1. Log in to the web application, and navigate to the Home page.
2. For Home page v12 under My Team, click the team member you want to view; and for Home page v3, under My Team, within the Manage My Team tile, click the team member you want to view.
3. For Home page v12, the tile flips to display the employee's details, and click Actions; and for Home page v3, on the pop-up window with employee details, click Take Action.

4. Click Annual Summary.

The Annual Summary view of the selected employee appears.

Accessing employee's Annual Summary view via the mobile application:

1. Launch the SAP SuccessFactors application.
2. Tap the Team tab at the bottom of the app.
3. Swipe left for the member of your team you want to view.
4. Tap the Take Action button, and select the 1:1 Meeting view.
5. Tap the menu toggle icon on the upper-right corner of the app, and tap Annual Summary.

The Annual Summary view of the selected employee appears.
7 Ad-hoc Reporting

You can create ad-hoc reports to track details such as the list of completed activities, the achievements year to date, the total number of one-on-one meetings between employee and manager, etc. To generate the ad-hoc reports you need to have access to the Reports module in your application.

7.1 Configuring the Reports module

You should enable the Reports module for accessing it in your application instance.

Procedure

1. Launch the application, log in as Admin and navigate to the Admin Center page.
2. In the Tool Search field, search for Manage Permission Roles.
3. On the Permission Role List page, select the permission role created for managers. The Permission Role Detail page appears.
4. Under Permission settings, click Permission.
5. In the Permission settings dialog box, under User Permissions, click Reports Permission.
6. Select Create Ad-Hoc Report, and ensure that Continuous Performance Management is selected.
7. Select Run Ad-Hoc Report, and ensure that Continuous Performance Management is selected.
8. Click Done.
9. On the Permission Role Detail page, scroll down to the Grant this role to section, and ensure that the role is associated with the group you've created for CPM managers.
10. Click Save Changes.

The ad-hoc reporting module is now accessible in the application.

7.2 Creating an Ad-hoc report

You can easily generate ad-hoc reports on Continuous Performance Management.
Procedure

1. Launch the application, and navigate to the Reports module.
2. Click the Analytics tab, and under Reports, click Ad Hoc Reports.
4. For the Report Type field, select Single Domain Report.
5. From the Report Definition Type dropdown list, select Continuous Performance Management, and click Create.

7. To include the employees to be considered while generating the report, click the People tab, and under Define Report Scope, click Refine Criteria.

8. In the Define Team dialog box, select Team Manager, select Team Reporting Type and click OK.

9. Then, to configure the fields that you need in your ad-hoc report, click the Columns tab.

10. In the Edit Columns section, click Select Columns. The Select Columns dialog box appears.
11. Select the fields you need as columns in your report, and click Save. You have successfully created your ad-hoc report.

12. Next, to run the report, click Back to Ad Hoc Reports List, and next to the Report Name, click the drop-down list, and select Run Report.

13. On the Execute <Report Name> pop-up window, select the type of output you want to generate, and click Generate Report.

Your ad-hoc report will be generated. You can download the file in PDF, CSV, Excel, or PPT format for later use.

7.3 Applying Filters to Ad-hoc Reports

You can generate customized ad-hoc reports by applying filters to the fields in your report. You can create and apply one or more filter groups, to every ad-hoc report you generate.
Procedure

1. Launch the application, and navigate to the Reports module.
2. Click the Analytics tab, and under Reports, click Ad Hoc Reports.
3. For an existing Continuous Performance Management report, click the corresponding dropdown list, and select Edit. The General Info tab of the report appears.

4. Navigate to the Filters tab. By default, one filter group already exists.

5. To configure the filters using the existing ‘Filter Group’, click Refine Criteria. The Select Filter dialog box appears.
6. Under *Filters*, select a field (that appears as a ‘column’ in your report) on which you want to apply the filter. The *Define <Field name> Filter* dialog box appears.
7. Configure the filter either **By My Selection** or **By Rule**, select relevant options, and click **Done**.

8. Repeat steps 6 and 7 to apply as many filters as you want.

9. On the **Select Filter** dialog box, click **Done**.

You have successfully applied filters to your ad-hoc report.

**Note**

You can generate an ad-hoc report on your existing activities or on your 1:1 meeting history by applying filter to the Snapshot fields: **Activity Snapshot** and **Other Topic Snapshot**.

- To generate a report on 1:1 meeting history, set the filter as true.
- To generate a report on existing activities in the current 1:1 meeting, set the filter as null or false.
8 Integration with Goal Management

You can link the achievements that you add via the Continuous Performance Management solution to your default performance goal plan. It enables you and your manager to directly view the continuous performance-based achievements in your default goal plan.

Contact SAP support to integrate Continuous Performance in your Goal Plan using the XML template. After the integration, you will be able to view the CPM-based achievements in your default goal plan.

Prerequisites

- Goal Management (GM v12) should be correctly configured, as described in the Implementation guide for Goal Management
- The product edition is either Enterprise or SPRAC

Configuration

To integrate continuous performance with Goal Plan, you need to contact the Cloud Product Support team. They will configure a switch in your goal plan via the XML template as follows:

1. Log in to Provisioning, go to the Company Instance, and under Managing Plan Template, click Import/Update/Export Objective Plan Template.
2. Download the Goal Plan template and open the XML file.
3. In the file, search for the XML element 'obj-plan-name' to find the location for inserting the CPM-related XML element, switches.
4. Insert 'switches' after 'obj-plan-name', in the following sequence:

   <obj-plan-name> < obj-plan-name/>
   <obj-plan-desc> < obj-plan-desc/>
   <obj-plan-lastmodified> < obj-plan-lastmodified/>
   <obj-plan-start> < obj-plan-start/>
   <obj-plan-due> < obj-plan-due/>
   <obj-plan-numbering> < obj-plan-numbering/>

   <switches>
   <switch for="continuouspm-integration" value="on"/>
   </switches>

   Note

   After 'obj-plan-name', all the elements in the above sequence are optional, and may or may not exist in your XML template. So, for the ones that exist, ensure that they appear in the defined order.

5. Upload the Goal Plan template without changing the file name. The existing template is replaced by the updated version.

   Your CPM-based achievements will now be available in your default goal plan. For more information on goal plan template, please refer to the Goal Management Implementation guide.