



SAP SuccessFactors

Performance & Goals

2H 2024 Release Briefing

By Jesper Nielsen



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SuccessFactors Experience: Since 2014

Jesper Nielsen is a highly experienced consultant with 10+ years of experience with SAP HCM and SuccessFactors.

Jesper holds a professional certification in SAP SuccessFactors Performance & Goals. He also has a Technology Consultant certification for Qualtrics EX.

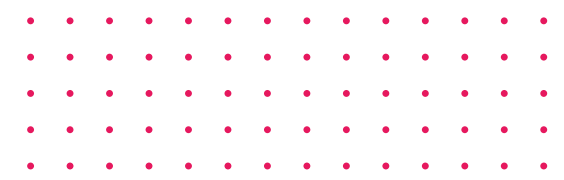


Agenda

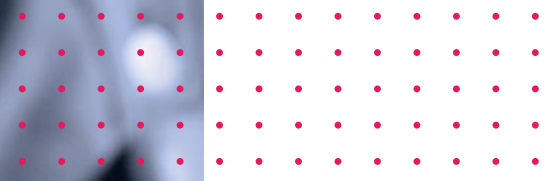
SAP SuccessFactors Performance & Goals

- Most Important Topics
- Other Release Features
- Deep Dive Topic
- Product Road Map





Most Important Topics



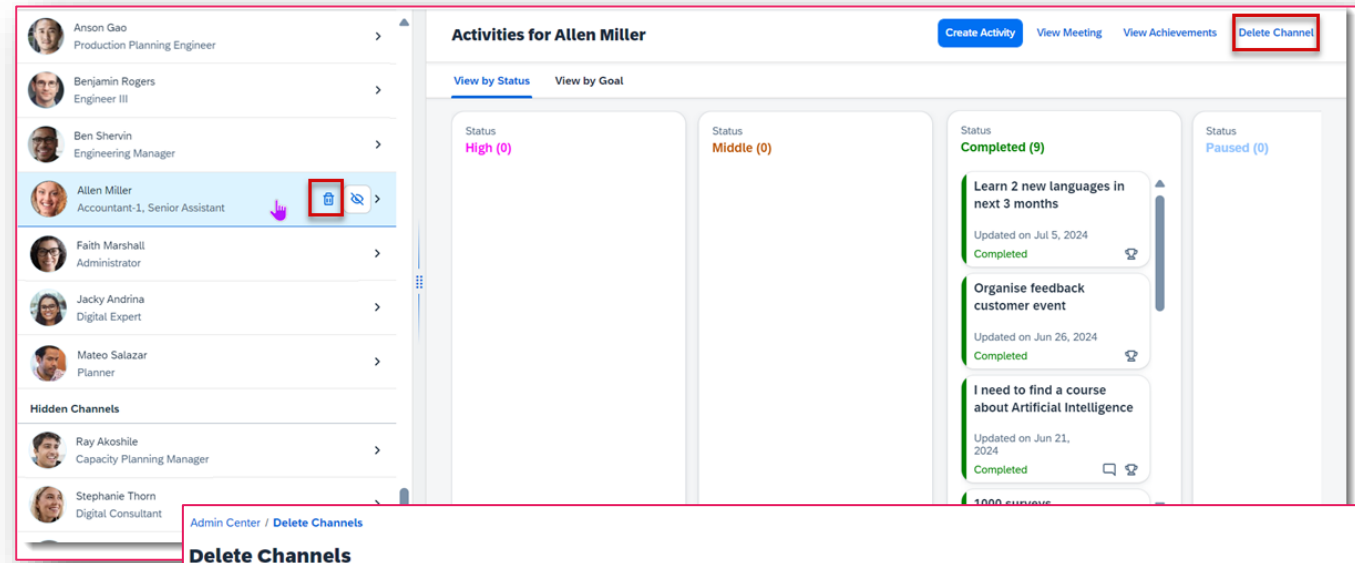
Delete Channels in Continuous Performance Management

- The option to Delete Channels is now available for users. The owners of a channel can now delete it either one-by-one or via bulk deletion.
- Permission can be granted to admins as well, to delete channels for users.
- Only channels that were manually created can be deleted (i.e. channels with Manager and possibly Matrix Manager are not removable).

Type: New

Lifecycle: General Availability

Enablement: Automatically on



Admin Center / Delete Channels

Delete Channels

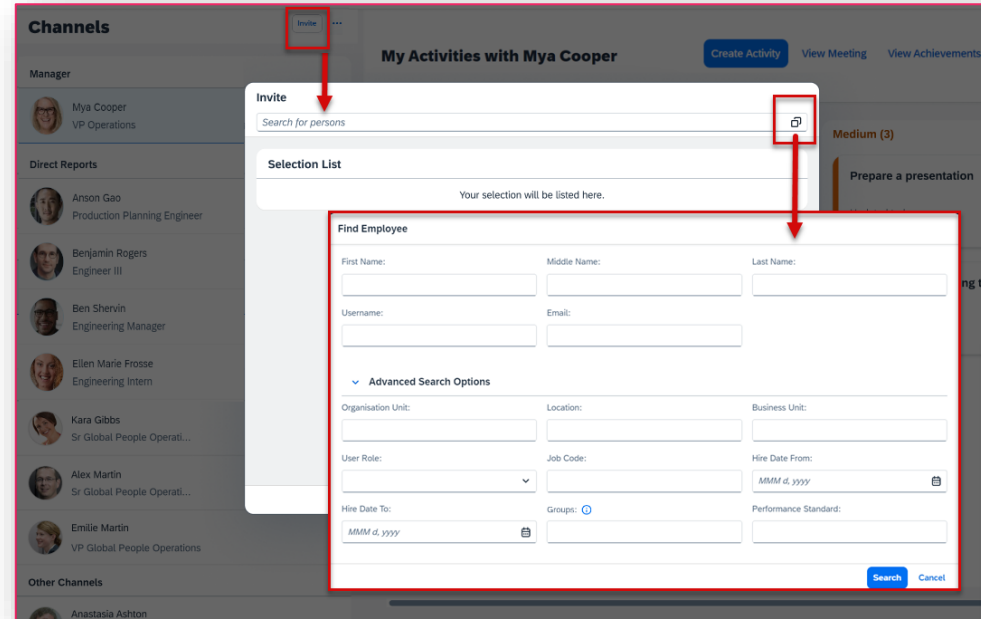
Owner: 244 Items Participant: Search for a participant No Updates After: MMM d, yyyy Search Reset

<input type="checkbox"/>	Owner	Owner's Job Title	Participant	Participant's Job Title	Last Updated on
<input type="checkbox"/>	Anson Gao	Production Planning Engineer	Benjamin Rogers	Engineer III	Jan 24, 2024
<input type="checkbox"/>	Geoff Hill	Production Director	Jada Baker	Program Management Office	Mar 28, 2024
<input type="checkbox"/>	Geoff Hill	Production Director	James Klein	Assembly Manager	Jul 26, 2024
<input type="checkbox"/>	Geoff Hill	Production Director	Jonathon Blake	Engineering Intern	Aug 27, 2024
<input type="checkbox"/>	Geoff Hill	Production Director	Leona Marie Frosse	Engineering Intern	Aug 27, 2024
<input type="checkbox"/>	Geoff Hill	Production Director	Mateo Salazar	Planner	Aug 30, 2024
<input type="checkbox"/>	Geoff Hill	Production Director	Patrick Coburn	Engineer II	Aug 30, 2024

The level of impact is High. We recommend testing this feature and preparing for its adoption.

Bulk Channel Invitations Now Supported in Continuous Performance Management

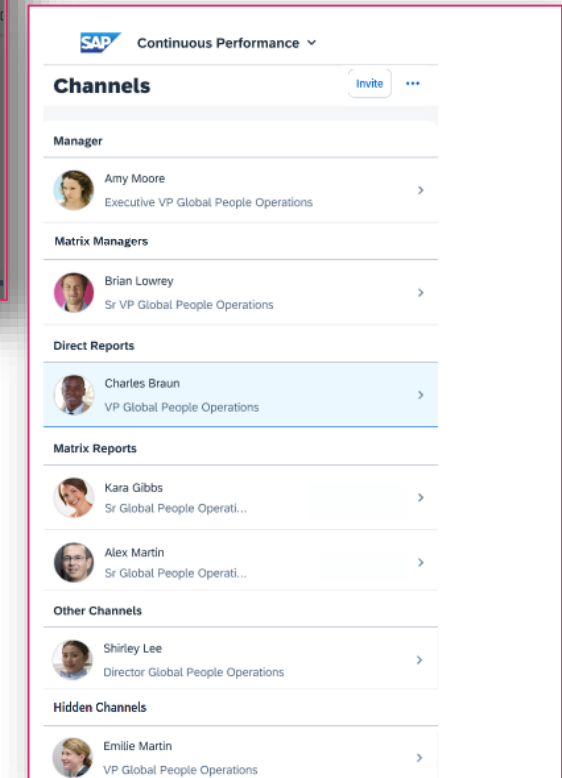
- Users can now bulk create / delete channels to invite/delete multiple channels in one go instead of individually.
- Channels are now grouped by relation type for easier overview.
- Various UI upgrades to navigation, Texts and Icons, etc.



Type: New

Lifecycle: General Availability

Enablement: Automatically on



The level of impact is Medium. We recommend testing this feature and preparing for its adoption.

Continuous Performance Improvements – Automatic Matrix Manager channel creation

- A new switch in Manage Continuous Performance Management is now available, for automatically creating a channel with Matrix Manager(s).
- The options is disabled by default – on enabling it will create channels between all Matrix Managers and their Matrix reports.

Type: New

Lifecycle: General Availability

Enablement: Customer configured

Feature Configuration

i Please be advised, once you enable or disable the feature and receive a confirmation that it was successful, the system performs one additional action (metadata refresh) before your selected configuration can be reflected in the solution.

- Enable "Discussion Topic" ?
- Enable Meeting Notes ?
- Enable Continuous Feedback ?
 - Enable Activity-Feedback Linking ?
 - Disable Deleting Feedback ?
 - Enable Continuous Feedback Outlook Integration (Step 1 of 2) ?
[Download Outlook file](#) (Step 2 of 2)
- Enable Multiple Role Support ?
- Enable matrix managers and matrix reports to be shown as people selections for Channels by default ?
- Enable Attachments on Activities ?

The level of impact is Medium. You can test this feature and decide if you would like to enable in your instance.

Delegation is now available for Performance Forms

- A new delegation feature can now be enabled to allow Managers to delegate Performance Forms to others, effectively replacing them in the route map.
- The same feature can be granted for admins, to allow for managing delegations on behalf of users.
- Be aware that this feature is planned to be released in prod on Dec. 13th, 2024!

Type: New

Lifecycle: General Availability

Enablement: Customer configured

The screenshot displays the 'Settings' page for 'Delegation'. It features a table with the following data:

Initiator	Delegator	Delegatee	Task Type	Task Details	Employee	Status	Valid Period	Actions
Marie Johnson	Carla Grant	Jennifer Lo	Performance Review	2024 Q3 Performance Review	Elena Petrova	Accepted	09/12/2024 - 09/30/2024	Cancel Edit Valid Period
Carla Grant	Carla Grant	Jennifer Lo	Performance Review	2024 Q3 Performance Review	Rahul Ghosh	Pending	09/12/2024 - 09/20/2024	Cancel Edit Valid Period
Carla Grant	Carla Grant	Jennifer Lo	Performance Review	2024 Q3 Performance Review	Xiaoming Zhou	Canceled	09/12/2024 - 09/30/2024	

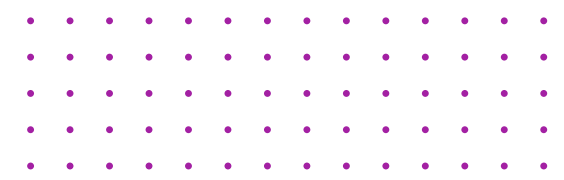
Below the main screenshot is a 'Delegator's View' of the same interface. In this view, the 'Delegator' column is highlighted, and the table shows:

Initiator	Delegator	Delegatee	Task Type	Task Details	Employee	Status	Valid Period	Actions
Sabine Mayer	Sabine Mayer	Carla Grant	Performance Review	2024 Q3 Performance Review	Rahul Ghosh	Pending	09/16/2024 - 09/25/2024	Accept Decline
Marie Johnson	Sabine Mayer	Carla Grant	Performance Review	2024 Q3 Performance Review	John Miller	Accepted	09/20/2024 - 09/21/2024	Go to Task

The level of impact is High. Test this functionality and decide if it's useful to your organization.



Other Release Features



General UX Enhancements to Latest Goal Management

Several UI/UX enhancements are coming with this release. Below are some highlights:

Weights are now displayed for Team Goals.

Activities, Milestones and Comments areas are now collapsible in the Goal Details view.

- And Milestones now show the full details (all columns) without needing to edit.

The level of impact is Low.

Type: New

Lifecycle: General Availability

Enablement: Customer configured

The screenshot displays the 'Manage Team Goals' interface. At the top, there are navigation links for 'My Goal Plan / Manage Team Goals' and a title 'Manage Team Goals'. On the right, there are buttons for 'Create Goal' and 'Assign Goal'. Below the title, there is a 'Goals' section with two goal cards. The first card is 'Increase Customer Retention' with '207 Days Overdue' and a progress indicator of 20%. The second card is 'Increase customer adoption - build the team' with a 'Due Date: Dec 31, 2024' and a progress indicator of 8%. Below the goal cards, there are sections for 'Milestones (2)', 'Linked Activities (33)', and 'Comments (15)'. The 'Milestones (2)' section is expanded, showing a table with the following data:

Milestone description	Start date	Due date	% Complete	Target Min	Target Normal	Target Max	Actual Number	Rating	Weight	Score
Improve user experience and customer satisfaction.	Mar 1, 2024	Dec 31, 2024	20%	1	100	200	20.00	20	10	2

The 'Comments (15)' section is also expanded, showing a comment from 'Carla' that says 'Please check the goal status again. Thanks!'.

Copy Goals on Behalf of Others

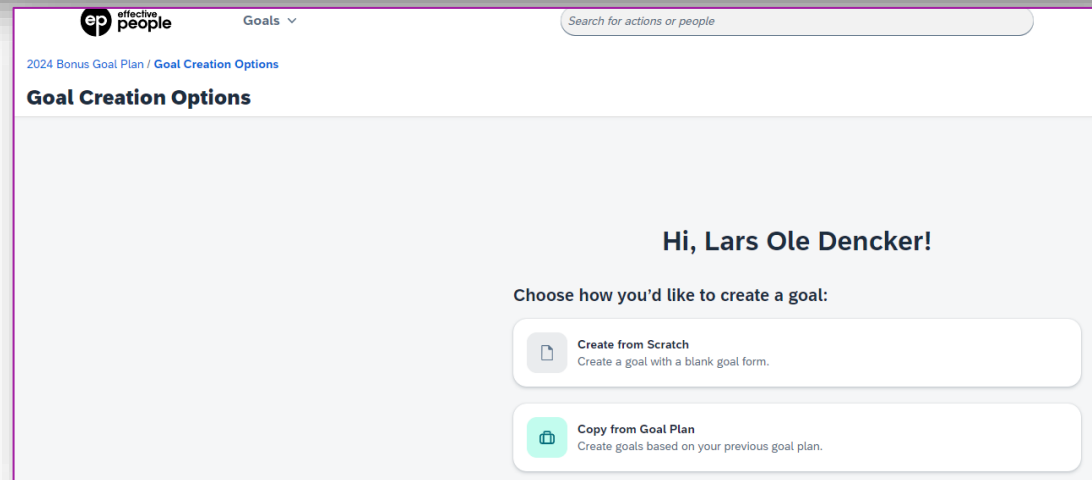
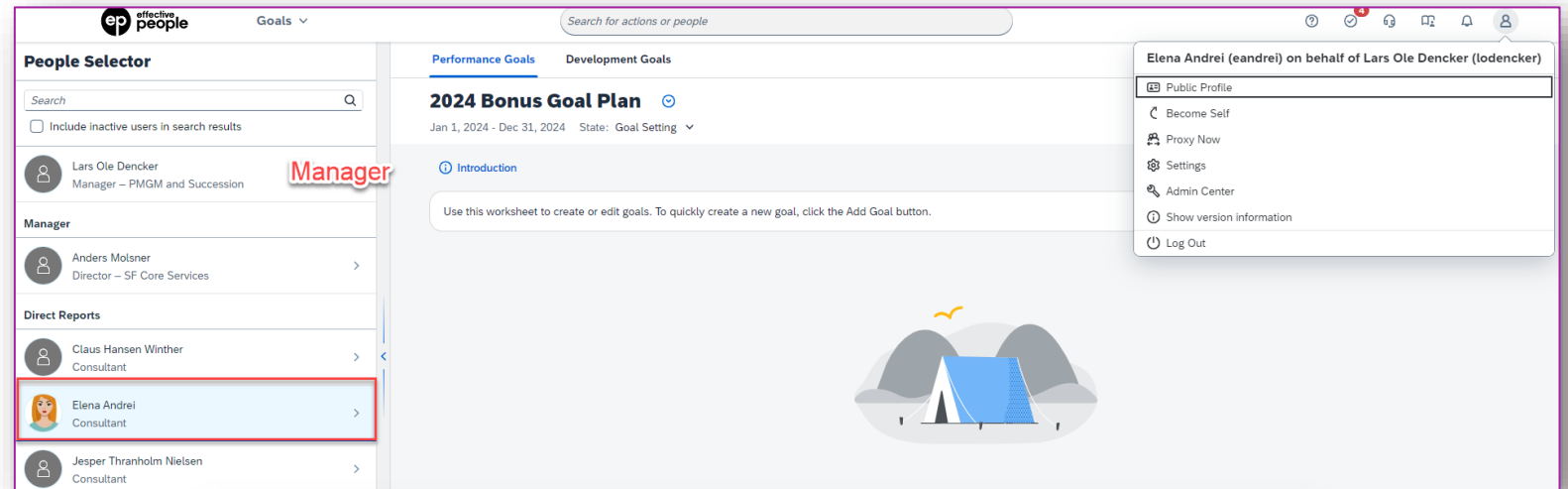
Managers can now navigate to an employee's Goal Plan and copy personal Goals on behalf of that Employee.

The source goal plan can be either a legacy or latest goal plan, but the target goal plan must be a latest one. This means the Copy from Goal Plan option is available only for latest goal plans.

Type: New

Lifecycle: General Availability

Enablement: Customer configured



The level of impact is Low.

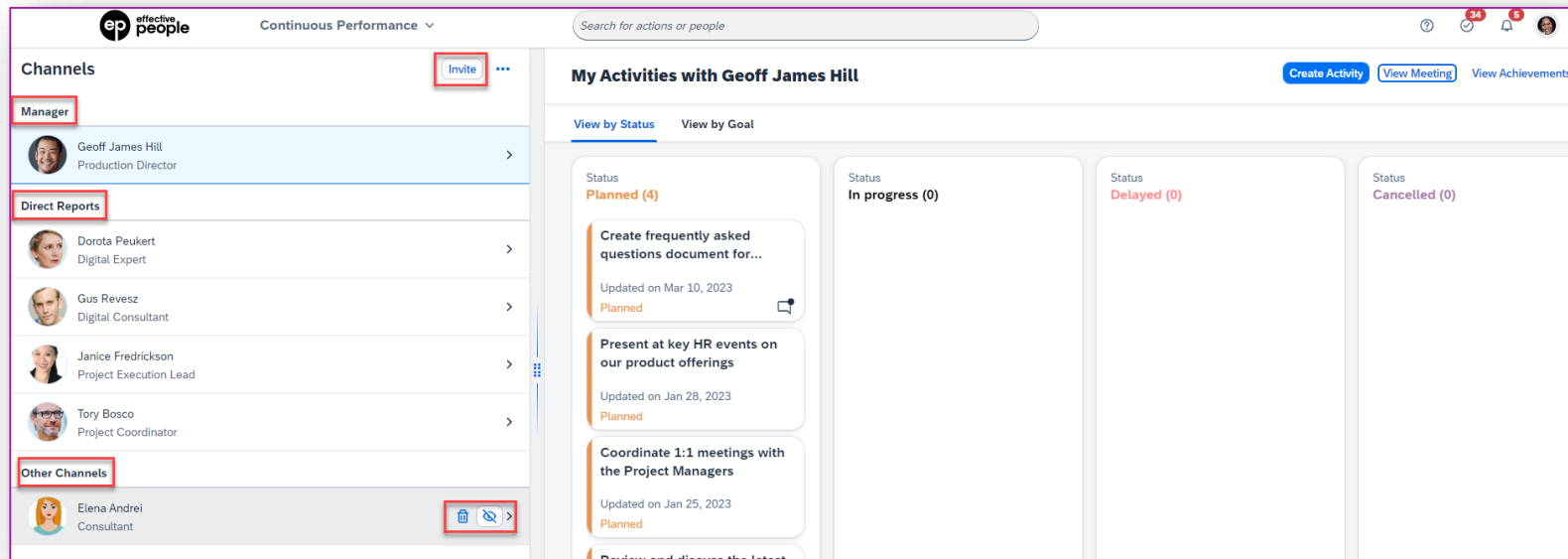
User Experience Enhancements to Continuous Performance Management

- More organized channel list: There's a header Channels to label the list. Within the list, channels can fall into up to six categories
- More consistent avatar experience: Now, the users who have no access to the channel list can see their manager's avatar on the header of Activities view, together with their own one.
- Better-designed navigation: All items on the Channels list are clickable and provide a unified navigation experience.
- Text and icon changes: The icon for deletion of the Declined channel invitations is now a trash bin & the channel invitation icon button is replaced by the text button Invite.

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on



The level of impact is Low. We recommending testing the changes.

Export Calibration Sessions to an XLSX File

You can now export calibration sessions to an XLSX file, which supports up to 16,384 columns. Previously, the exported file was in XLS format, which was limited to 256 columns.

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on

The screenshot shows the 'Calibration' interface. At the top, there is a dropdown menu for 'Name' and a 'Type' field set to 'Microsoft Excel Worksheet'. Below this, a table titled 'Sessions (110)' is displayed. The table has columns for Session, Template Name, Status, # of Subjects, Facilitator, Session Date, Last Mo..., Created by, and Action. The first row is selected, and the 'Export' button in the top right corner of the table is highlighted with a red box. A red arrow points from the 'Export' button to a file icon in the top right corner of the interface, which is labeled 'Performance_Review-09_04_2024-100116.xlsx'.

Session	Template Name	Status	# of Subjects	Facilitator	Session Date	Last Mo...	Created by	Action
<input checked="" type="checkbox"/> 2024 Performance Review Session	CalTemplateEPTalentFlag20230725	In Progress	39	Daniel Cortez		09/04/2024	Daniel Cortez	
<input type="checkbox"/> 2024 Potential Session	ATemplateXLXS	In Progress	40	Daniel Cortez	08/16/2024	09/04/2024	Daniel Cortez	
<input type="checkbox"/> 2024 PDP Calibration Session	2024 PDP Calibration Template	In Progress	23	Daniel Cortez	07/18/2024	09/04/2024	Daniel Cortez	

The level of impact is Low.

New Setting for Configuring Autosave

You can now choose to enable or disable the autosave feature in Calibration by changing the new setting, Enable Autosave, in the Manage Calibration Settings admin tool.

When the option is enabled, changes made in Calibration will be automatically saved after 30 seconds of inactivity. If disabled, users need to manually save any unsaved changes.

Type: New

Lifecycle: General Availability

Enablement: Customer configured

Admin Center > Manage Calibration Settings

Save | Cancel

Permissions | Search and Filter Fields | Global Settings

- Enable Enforce Comment Option In Views?
- Enable Manager Calibration Session?
- Show In-Progress Calibration Ratings In Live Profile?
- Enable Reverse Scale?
- Limit Employee to be included in only one calibration session at a time?
- Enable Calibration Executive Review?
- Launch Calibration from Team Overview of Performance Management?
- Enable Calibration Alert (Beta)?
- Remove "Too New to Rate" from rating options for the rating types from People Profile data?
- Enable Autosave?
- Exclude Rating Sources from Employee Profile Data?
 - Performance Management
 - 360 Reviews
 - Live Profile
 - Calibration

The level of impact is Low.

Turn Off Email Notification for Rating Changes During Session Finalization

You can now turn off the email notification Notify Calibration Rating Changes during Session Finalization under Admin Center → Email Notification Templates Settings.

When you disable this notification, managers will no longer receive emails about changes to their employees' ratings after sessions are finalized.

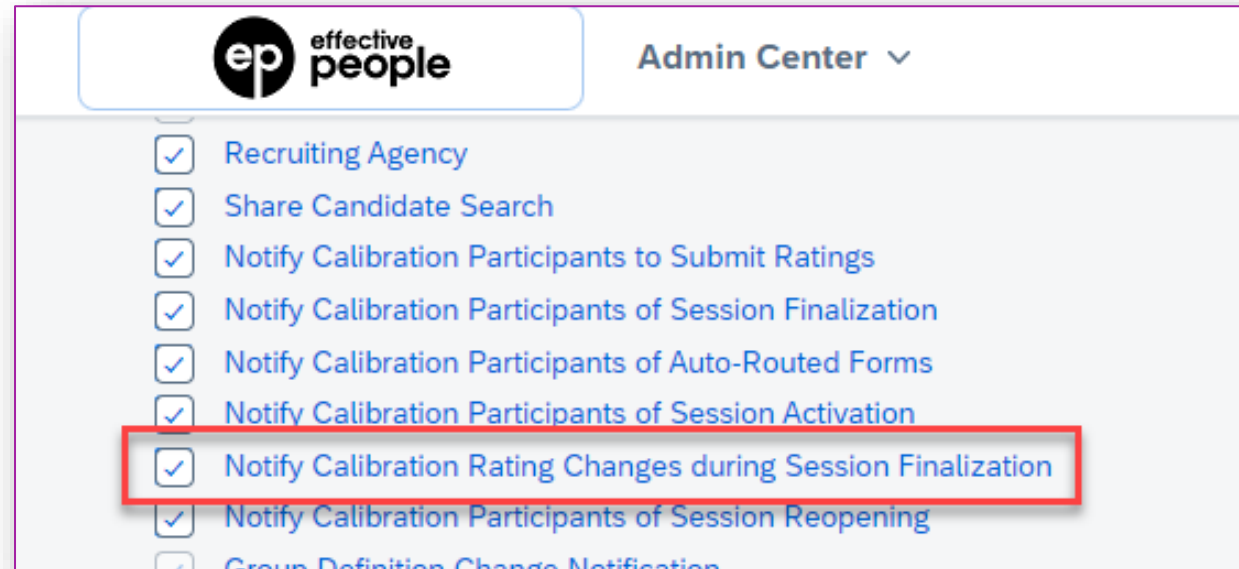
The level of impact is Low. The notification is disabled at a template level. You should verify that the same applies in Email Notif. Template Settings.

Type: New

Lifecycle: General Availability

Enablement: Customer configured

How it looks now (before it was greyed out):



Set Numerical Distribution in Calibration Templates

You can now set numerical distribution guidelines in Calibration templates for ratings from Performance Management forms. Previously, you could only define percentage-based distribution guidelines for ratings.

This feature allows you to specify the target number of subjects you want to assign to each rating.

Type: New

Lifecycle: General Availability

Enablement: Customer configured

The screenshot shows a software interface for configuring calibration templates. It includes tabs for 'Basic Info', 'Data', 'Views', 'Advanced', and 'Executive Review'. The 'Performance' section is active, with a dropdown menu set to 'All Performance Rating 2024'. Below this, there are instructions and a table for setting numerical distribution guidelines.

Set Numerical Distribution (optional)

Total Number	Sustainable Exceeded		Partially Exceeded		Exactly Achieved		Partially Achieved		Not Achieved		Delete
	Operator	Number	Operator	Number	Operator	Number	Operator	Number	Operator	Number	
5	=	1	ranges from	1 to 3	ranges from	1 to 3	ranges from	0 to 1	ranges from	0 to 1	X
6	=	1	=	2	=	2	=	1	=	0	X
7	=	1	=	2	=	3	=	1	=	0	X
8	=	2	ranges from	1 to 3	ranges from	1 to 4	ranges from	1 to 3	ranges from	0 to 1	X

The level of impact is Low. Consider if relevant to your organization.

Link and Unalign Goals

Goal Linking between Goal Plans is now available, allowing users to link Goals on their plan to other users Goals.

Once created these links are displayed on the Goal Alignment Chart.

This feature increases visibility on collaboration by highlighting connection between users Goals.

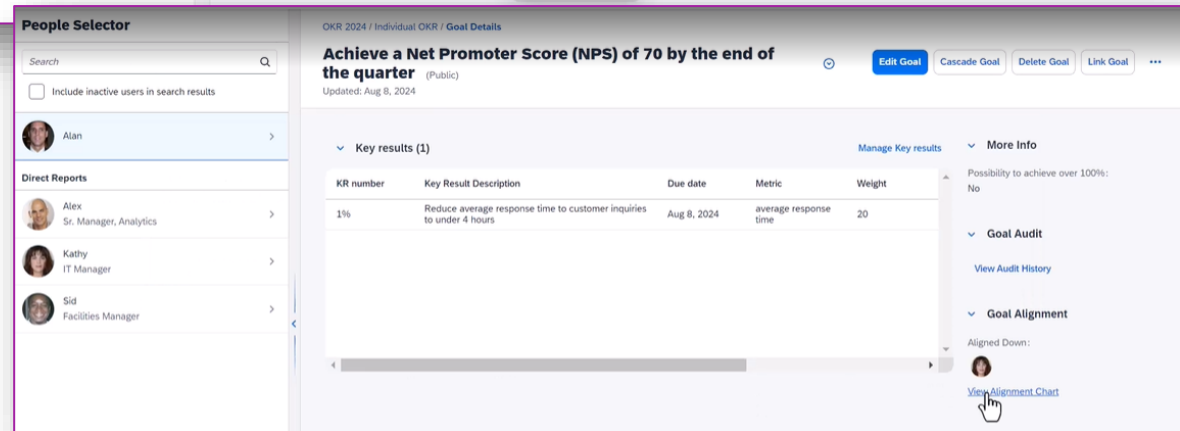
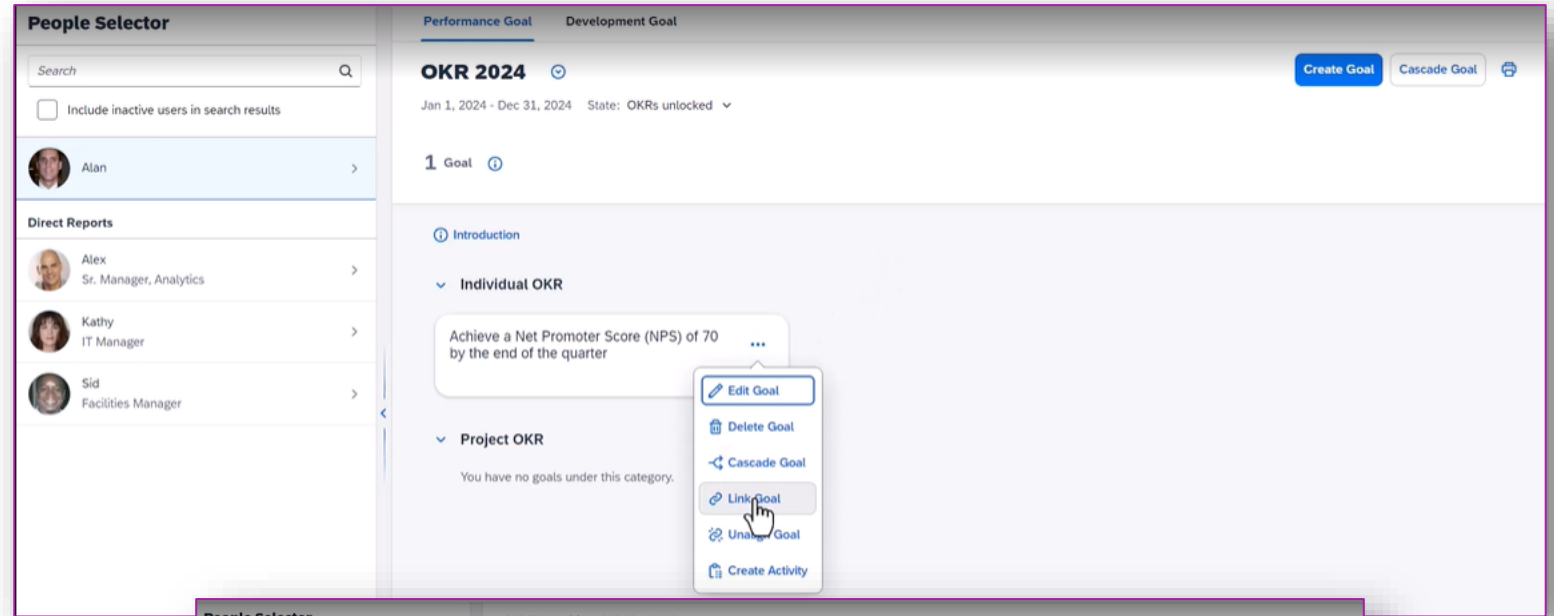
If you are using the Goal Alignment Chart this feature is a great enhancement to further visibility on Goal collaboration across the organization.

The level of impact is Low. If Goal Alignment Chart is already in use consider enabling this feature.

Type: New

Lifecycle: General Availability

Enablement: Contact Enablement Partner



Setup Goal Modification Email Jobs in Admin Center

You can now create the job for Goal Modification (for sending mails on Goal Creation, Deletion and Modification), via Scheduled Job Manager.

When you enable one of the Goal Modification Email notifications, this job needs to be scheduled for any emails to be sent.

The level of impact is Low. Only relevant when enabling/disabling the Goal modification emails.

Type: New

Lifecycle: General Availability

Enablement: Customer configured

The screenshot shows the 'Create Job Request' interface in the Admin Center. The breadcrumb trail is 'Admin Center / Scheduled Job Manager / Create Job Request'. The title is 'Create Job Request' with a subtitle 'Create a scheduled job request. Required fields are marked with an asterisk (*).' The form is divided into two main sections: 'Job Definition' and 'Job Occurrence'.
In the 'Job Definition' section, the following fields are visible:
- 'Job Name': A text input field with an asterisk.
- 'Job Type': A dropdown menu with 'Goal Modification Email' selected.
- 'Job Owner': A search field with the placeholder 'Search for people' and a magnifying glass icon.
- 'Job Parameters': A section with three radio button options: 'Date Range' (selected), 'Today', and 'Yesterday'. The 'Date Range' option has a text input field with the placeholder 'MMMM d, yyyy - MMMM d, yyyy' and a calendar icon.
Below the 'Job Parameters' section is an information box with a blue header and a white background, containing the text: 'The date range displayed in Admin Center aligns with your browser's time zone, while the job synced to Provisioning remains in the UTC+0 time zone. It's not recommended that you edit the job in Provisioning once it has been created in Admin Center to avoid discrepancies.'
The 'Job Occurrence' section is partially visible at the bottom, showing a blue information bar with the text: 'Jobs are scheduled based on server time. Current time: 2024-09-19T03:46:38Z'. Below this bar, the 'Occurrence' section has three radio button options: 'One-Time' (selected), 'Recurring', and 'Dependent Of'.

Type: Changed

Lifecycle: General Availability

Enablement: Contact Customer Engagement Executive or Account Manager

Enhancements to AI-Assisted Goal Creation

- Here are the enhancements to AI-assisted goal creation in the latest Goal Management:
 - **Updated AI tag:** On the goal creation page, the tag for fields with content generated by AI is now "AI-generated content", replacing the previous "AI-enhanced content".
 - **Streamlined content comparison:** The Compare Generated Content page has been removed, making the process more efficient by eliminating the step where users had to choose between two versions of goal content. Instead, the AI-assisted writing tool is now in place to enhance content directly at the field level.
 - **Improved prompt template:** The prompt template is now optimized to automatically apply goal plan configurations, such as start, due, and "maxlength", to AI-generated goals.
 - **Support for custom fields:** Custom fields of text and "textarea" types are now supported for performance goals. By providing meaningful text for <field-description>, you specify the context, which in turn helps improve the quality of AI-generated content. This ensures that the AI can generate more accurate and relevant suggestions for your goals.

The level of impact is Low. If AI is used, these enhancements should be considered.

Roll-up Calculation Supported for Cascaded and Linked Goals

Type: New

Lifecycle: General Availability

Enablement: Contact Enablement Partner

- Roll-up calculation is now supported for cascaded and linked goals in the latest Goal Management.
- With support for the rollup-calc-type attribute, you can set it to avg or sum for the bizx-actual, bizx-target, and bizx-pos fields. Depending on your configuration, the sum or average values for these fields are automatically calculated across cascaded and linked goals. These values are then reflected in source goal details.
- Once roll-up calculation is configured, each time a parent goal is cascaded or linked, two audit records are generated for it. One record indicates the action type, either "Cascaded" or "Linked," based on the action taken. The other record shows "Modified" due to changes in the roll-up fields.
- This feature improves goal tracking by providing goal owners with a clear and accurate view of overall progress.

The level of impact is Low. If feature is used we recommend testing these changes.

Type: New

Lifecycle: General Availability

Enablement: Contact Enablement
Partner

Hide "Create from Scratch" Option for Goal Creation

- The turnoff-add-personal-goal-button switch is now supported in the latest Goal Management, allowing you to hide the Create from Scratch goal creation option for performance goals.
- Once you set it to on in the goal plan template, the option to create goals from scratch becomes unavailable, and users will be guided to use other predefined options, such as Copy from Goal Plan or Create from Library, depending on your configurations.

The level of impact is Low. If it is desired to only work with e.g. Library Goals, consider this feature.

Person-Based Background Information Displayed for Concurrent Employment in Talent Card

The talent card now displays background information for employees with concurrent employments based on persons rather than users.

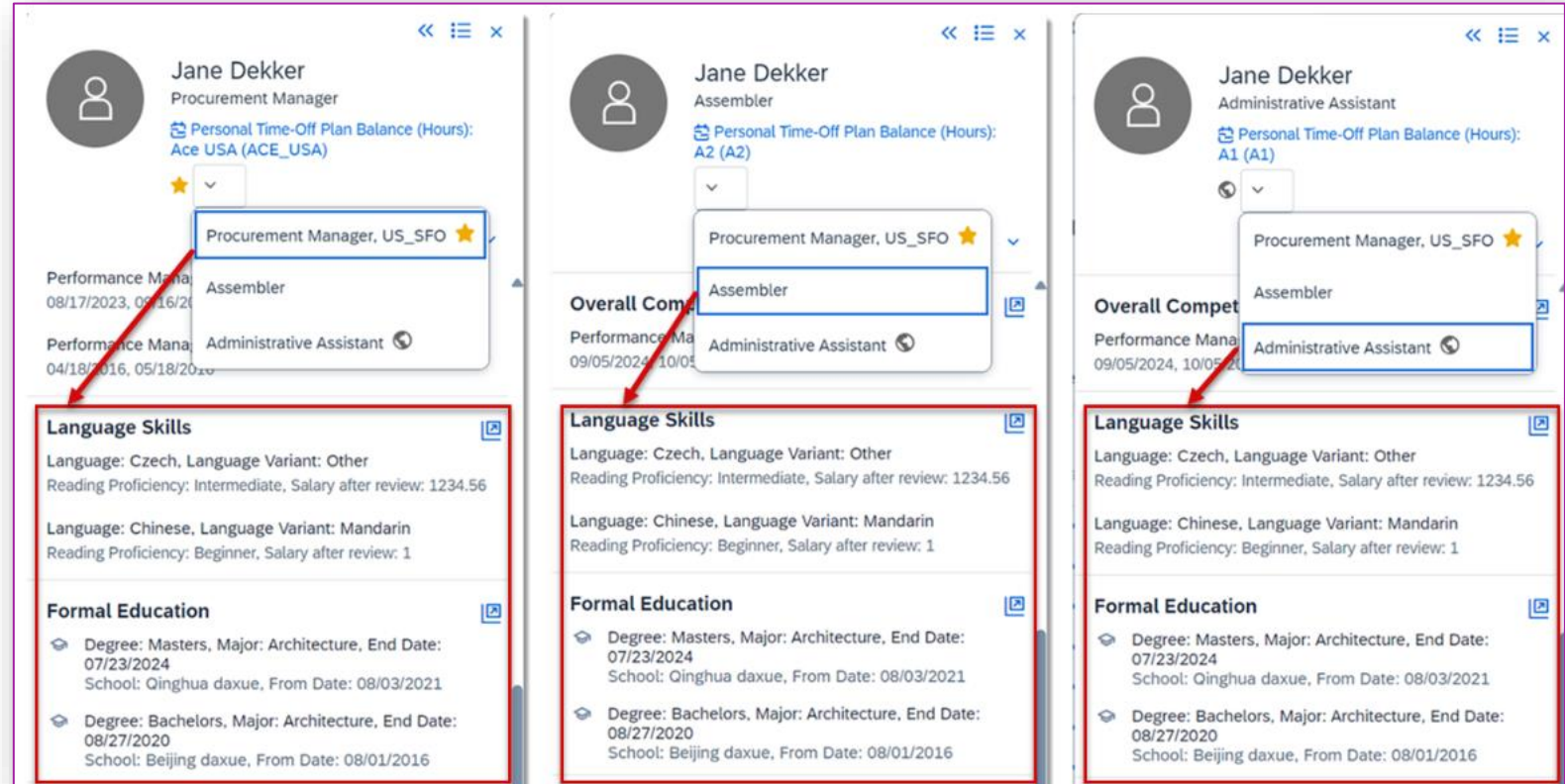
When you've selected the option Enable Person-Based Background Information Blocks under Admin Center Company System and Logo Settings, all the background information records related to an employee with concurrent employments are displayed consistently across employments in the talent card. This data is the same as what appears on People Profile.

The level of impact is Low. If talent cards and Concurrent Employment is used we recommend testing these changes.

Type: Changed

Lifecycle: General Availability

Enablement: Automatically on



AI-Assisted Skill Recommendations from Continuous Performance Management Data

Type: Changed

Lifecycle: General Availability

Enablement: Contact Customer Engagement Executive or Account Manager

- Talent Intelligence Hub can now use AI-assisted capabilities to infer and recommend skills to employees in their Growth Portfolio using Continuous Performance Management data.
- When an employee enters details in the achievements, activities, or feedback section in Continuous Performance Management, this feature infers skills based on the employee's inputs.
- If the inferred skill exists in the Attributes Library of Talent Intelligence Hub, it is displayed as a recommended skill in the employee's Growth Portfolio. Employees can either add the recommended skill to their Growth Portfolio or reject the recommendation. If the inferred skill doesn't exist in the Attributes Library, the skill will be added to the Attributes Library and can be confirmed by Administrators for organizational use.

The level of impact is Low. If TIH and AI capabilities are enabled, we recommend to test.

Enhancements to the Latest My Forms Page for Performance Management and 360 Reviews

SAP made several enhancements related to filters, form lists, and form creation on the latest My Forms page. Those are attributed to:

- Filters
- Forms List
- Form Creation

Please have a look at the detailed changes [here](#). They are considered minor but good to be analyzed.

The level of impact is Low. Consider if relevant to your organization.

Type: New

Lifecycle: General Availability

Enablement: Customer configured

The screenshot shows a filter bar with the following elements: Template: All, Current Step: All, Group: All, All or Reports Only: All Employees, Employee: Search for employee, Division: All, Department: All, Location: All, and Go/Reset buttons.

The screenshot shows the 'Create Form' dialog box with a dropdown menu open. The dropdown menu lists the following options: 360 Reviews (2), 360 Feedback Review, Multi-Rater Review, Performance Management (21), 2021 Annual Performance Review, 2021 Mid-Year Performance Review, 2022 Annual Performance Review, 2022 Mid-Year Performance Review, and 2023 Annual Performance Review. The 'Create Form' button is also highlighted with a red box.

Type: Changed

Lifecycle: General Availability

Enablement: Different per item

Changes to 360 Reviews

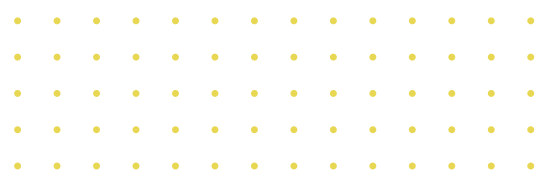
Here are some release items which are relevant to 360 Reviews. Navigate to “What’s New Viewer” to see more details.

- [Enhanced AI-Assisted Writing in 360 Reviews](#)
- [Custom Learning Supported on 360 Reviews Forms](#)
- [AI-Assisted Insights into Detailed 360 Report](#)
- [Exclude Process Owners of 360 Reviews from Inactive User Purges](#)

The level of impact is Low. If 360 reviews are enabled, we recommend to test.



Deep Dive Topic



Delegation feature for Performance Forms

- With the delegation feature, users, usually managers, can delegate their performance review tasks to other people within a specified period. It also allows administrators to create delegations on behalf of managers.

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

Settings									
Delegation									
Start Page		Sent		Received				Create	
Initiator	Delegator	Delegatee	Task Type	Task Details	Employee	Status	Valid Period	Actions	
Marie Johnson	Carla Grant	Jennifer Lo	Performance Review	2024 Q3 Performance Review	Elena Petrova	Accepted	09/12/2024 - 09/30/2024	Cancel	Edit Valid Period
Carla Grant	Carla Grant	Jennifer Lo	Performance Review	2024 Q3 Performance Review	Rahul Ghosh	Pending	09/12/2024 - 09/20/2024	Cancel	Edit Valid Period
Carla Grant	Carla Grant	Jennifer Lo	Performance Review	2024 Q3 Performance Review	Xiaoming Zhou	Canceled	09/12/2024 - 09/30/2024		

The level of impact is High.

Delegation feature for Performance Forms

- Delegation is disabled by default, so must first be enabled in Company System and Logo Settings.
- Secondly the feature must be permissioned via Role Based Permissions, allowing you to decide whom to grant access to delegation.

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

The image shows two screenshots from the effective people Admin Centre. The top screenshot displays system settings for 'Threshold for processing direct reports and job relationships offline' (set to 0), 'Default event reason to use when processing direct reports and job relationships offline' (set to 'Select one'), 'Matrix Report Threshold' (set to 50), and 'Data Retention Management' options. The bottom screenshot shows the 'View Role for Performance Reviewer (Delegation)' configuration page. It includes user details: User Type: Employee, Status: Active, RBP-Only: No, Last Modified: 22 Oct 2024, Last Modified By: Jesper Thranholm Nielsen. The 'Permissions' tab is active, showing 'User Permissions' with 'Objectives' (Objective Management Access, Objective Plan Permissions †(All)) and 'General User Permission' (User Login). The 'Delegation' section lists: Delegator-Delegatee Relationship †(Review Performance Management Forms), Delegator-Employee Relationship †(Review Performance Management Forms), and Create Delegation Based on Form Templates(All).

The level of impact is High.

Delegation feature for Performance Forms

- Once enabled and permissioned the Delegation feature will appear under the Settings menu.
- Here users can create new Delegations by first selecting the type of task to delegate – Performance Management forms.
- Next selecting the Delegatee whom the delegation goes to and the Start- and End Dates for the delegation.
- The users that can be selected for delegation is controlled by the target population set in the permission role.

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

The screenshot displays the 'Create Delegation' interface in the effective people system. The interface is divided into a left sidebar with a 'Settings' menu and a main content area. The 'Settings' menu includes options like 'Start Page', 'Sub Tab Configuration', 'Notifications', 'Change Language', 'Compensation Number Format', 'Forms', 'Accessibility Settings', 'Proxy', 'Groups', 'Mobile', 'Privacy Statements', and 'Delegation'. The main content area shows the 'Create Delegation' workflow with four steps: 1. Select Task Type, 2. Specify Delegation Details, 3. Specify Task Details, and 4. Review. The current step is '2. Specify Delegation Details', which includes a form for selecting a delegatee and a valid period. The delegatee is 'Elena Andrei' and the valid period is set for October 25, 2024.

The level of impact is High.

Delegation feature for Performance Forms

- Next select the Employees who are to be delegated – more than one employee can be selected at a time.
- Then select the Form Template to be delegated for these employee.
- Last, review the Delegation task and Create.

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

The screenshot illustrates the 'Create Delegation' process in the system settings. It is divided into four steps: 1. Select Task Type, 2. Specify Delegation Details, 3. Specify Task Details, and 4. Review. The current view is on step 3, 'Specify Task Details', where users select employees and templates. A list of employees is shown, including Klaus Frommherz, Klaus Mueller, Claus Hansen Winther, and Claud Vigne. A 'Select Templates' dialog is open, showing a list of templates with '2024 Performance with Bonus Goals - Year-End' selected. The bottom part of the screenshot shows the 'Create Delegation' summary screen, which displays the task type, delegatee, valid period, and selected employees and templates.

The level of impact is High.

Delegation feature for Performance Forms

- On the Delegation page, you can review tasks that you have created or received.
- Here you can Cancel, Edit and Create new tasks.
- Notice the Status column here – once a Delegation request is send, it must be Accepted by the recipient before it takes effect.
- Logging in as the recipient we can accept or decline the request.

The level of impact is High.

Type: Changed

Lifecycle: General Availability

Enablement: Customer configured

The screenshots show the 'Delegation' page in the effective people system. The top screenshot shows a table with two rows of delegation requests, both in a 'Pending' status. The bottom screenshot shows the same table after the requests have been accepted, with the status changed to 'Accepted' and 'Accept'/'Decline' buttons appearing in the 'Actions' column.

Initiator	Delegator	Delegatee	Task Type	Task Details	Employee	Status	Valid Period	Actions
Lars Ole Dencker	Lars Ole Dencker	Elena Andrei	Review Performance Management Forms	2024 Performance with Bonus Goals - Year-End	Jesper Thranholm Nielsen	Pending	10/25/2024 - 11/07/2024	Cancel, Edit Valid Period
Lars Ole Dencker	Lars Ole Dencker	Elena Andrei	Review Performance Management Forms	2024 Performance with Bonus Goals - Year-End	Claus Hansen Winther	Pending	10/25/2024 - 11/07/2024	Cancel, Edit Valid Period

Initiator	Delegator	Delegatee	Task Type	Task Details	Employee	Status	Valid Period	Actions
Lars Ole Dencker	Lars Ole Dencker	Elena Andrei	Review Performance Management Forms	2024 Performance with Bonus Goals - Year-End	Jesper Thranholm Nielsen	Pending	10/25/2024 - 11/07/2024	Accept, Decline
Lars Ole Dencker	Lars Ole Dencker	Elena Andrei	Review Performance Management Forms	2024 Performance with Bonus Goals - Year-End	Claus Hansen Winther	Pending	10/25/2024 - 11/07/2024	Accept, Decline

Delegation feature for Performance Forms

- Once accepted the recipient can access the form(s) from the Delegation menu.
- Within the forms, the Delegatee inherits the permissions of the delegating Manager and can perform ratings, comments, etc.

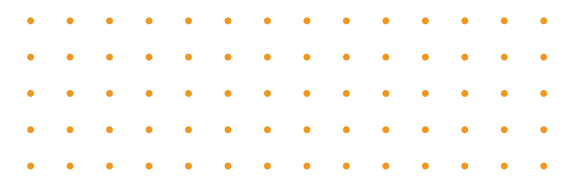
Type: Changed

Lifecycle: General Availability

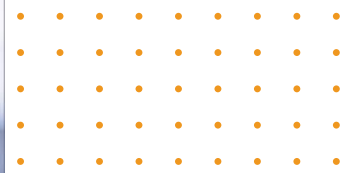
Enablement: Customer configured

The screenshot displays the 'effective people' interface. The top navigation bar includes the logo, 'Home', and a search bar. The 'Settings' sidebar on the left lists various configuration options, with 'Delegation' selected. The main content area is titled 'Delegation' and features a table with columns for Initiator, Delegator, Delegatee, Task Type, Task Details, Employee, Status, Valid Period, and Actions. Two rows of data are visible, both involving 'Lars Ole Dencker' as initiator and delegator, and 'Elena Andrei' as the delegatee. A 'Delegated Forms (2)' modal window is open, showing a list of forms to be reviewed, including '2024 Performance with Bonus Goals - Year-End for Jesper Thranholm Nielsen'. Below the modal, the performance form itself is shown, with the delegatee 'Jesper Thranholm Nielsen' and a rating of '1.0 - Fair'. The form includes sections for 'Accepting Direction', a rating scale, and a comment box.

The level of impact is High.



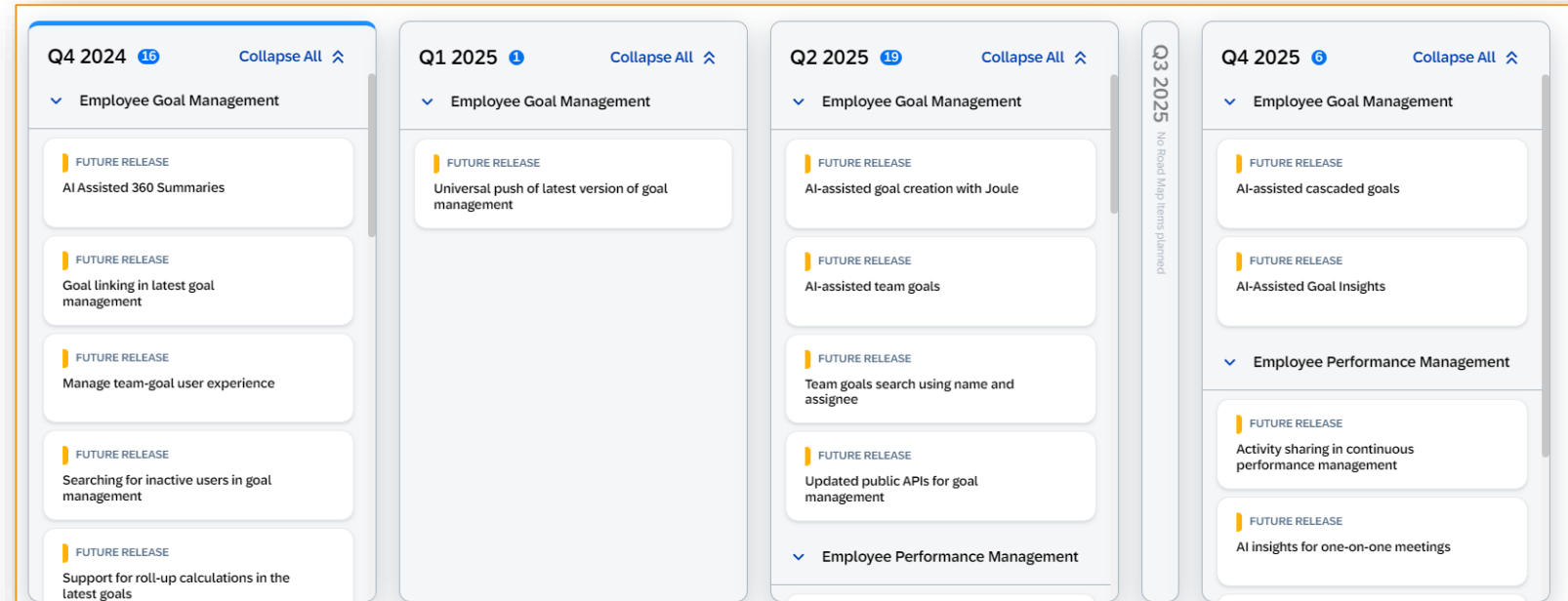
Product Road Map



Product Road Map

There are a quite a few items related to Performance & Goals currently on the roadmap which can be checked in detail here:

[SAP Road Map Explorer](#)





Thank You.

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