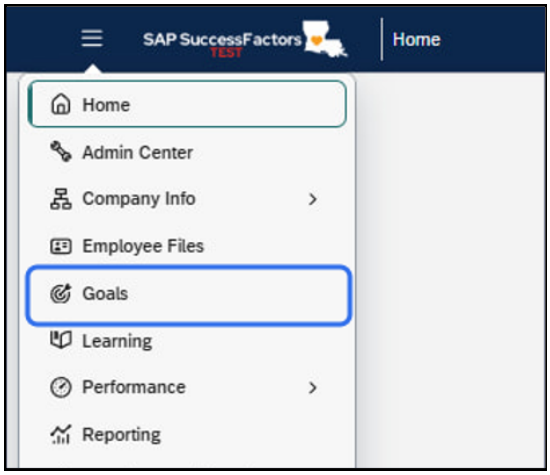
SAP SuccessFactors

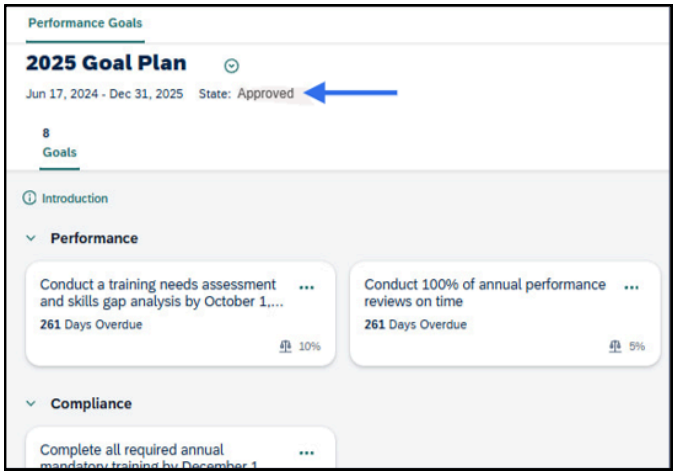
How to Copy Goals from Previous Years

While goals may either be added through the Goal Plan or directly to the CPM Planning Form, **you can only copy goals through the Goal Plan**.

1 NAVIGATE TO THE GOAL PLAN

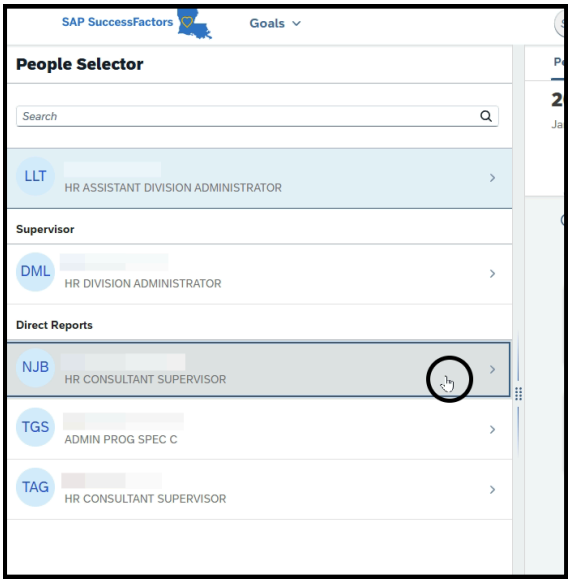
Click **Goals** in the **Main Menu**. Your Goal Plan appears as the default page view. The **Goal State** appears at the top of the Goal Plan.





2 SELECT THE EMPLOYEE

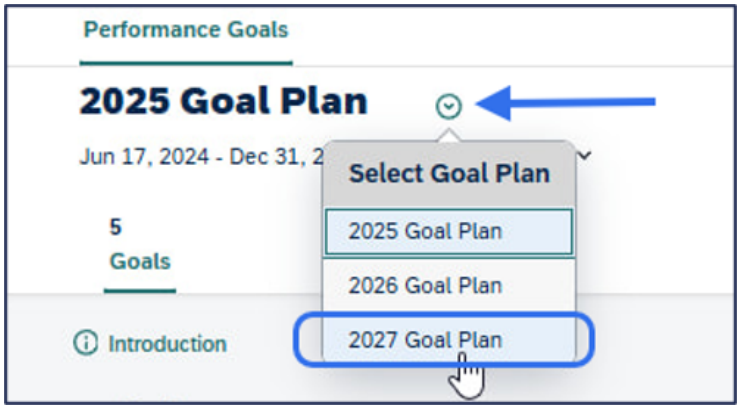
Click on the **employee** whose Goal Plan you want to copy.



You cannot copy a goal from one employee's goal plan to a different employee.

3 SELECT THE PERFORMANCE PLANNING YEAR

Select the **Goal Plan year** for the year you are planning.



How to Copy Goals from Previous Years (continued)

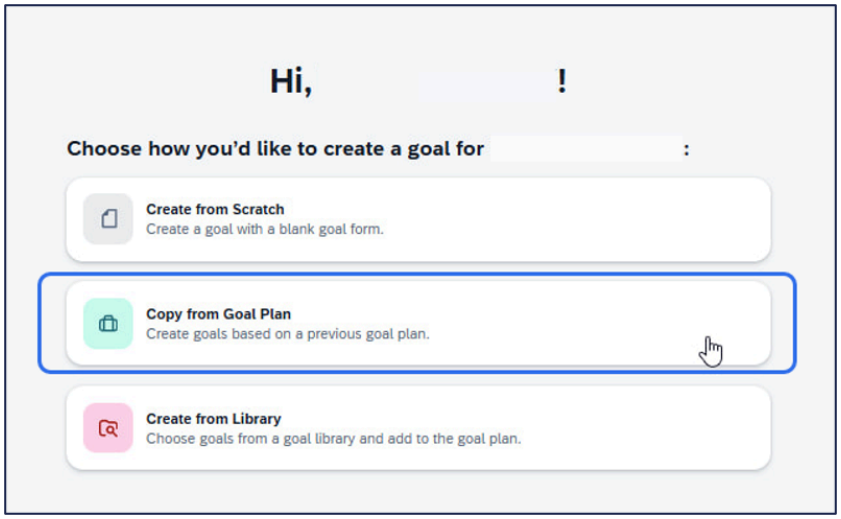
4 CREATE GOAL

Click **Create Goal** at the top right of the screen.



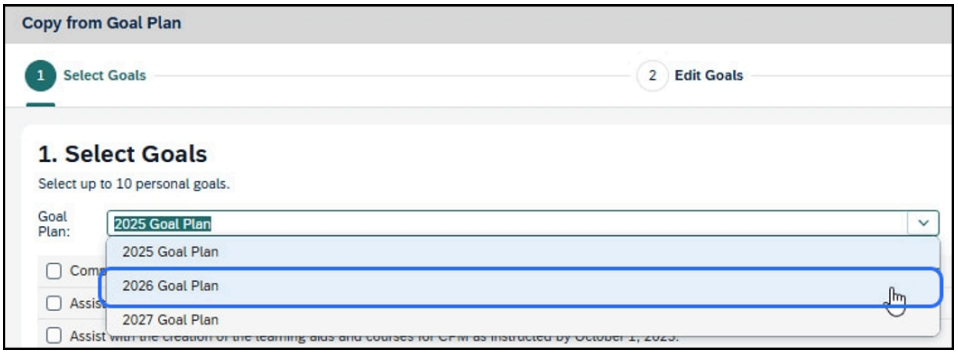
5 SELECT COPY

Select Copy from **Goal Plan**.



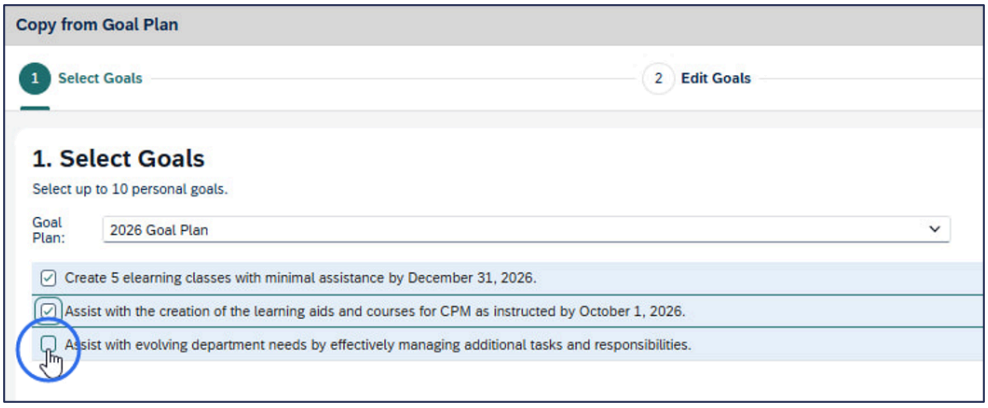
6 SELECT GOAL PLAN

Use the dropdown to select the **Goal Plan year** from which you want to copy. Then, select **Next**.



7 SELECT GOALS

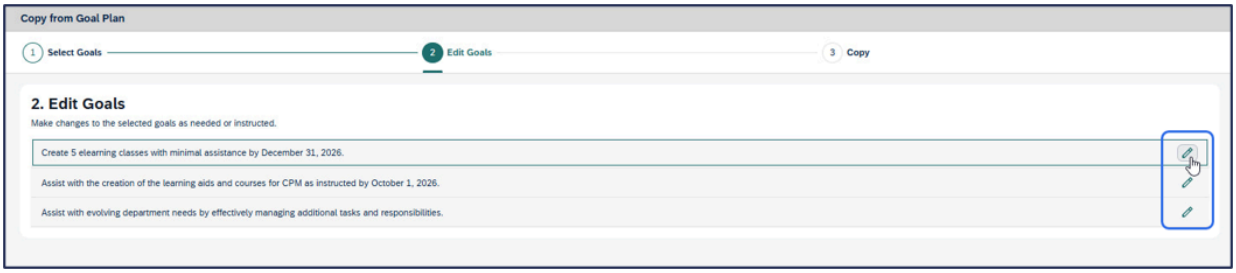
Select the goals you want to copy. Then, select **Next**.



How to Copy Goals from Previous Years (continued)

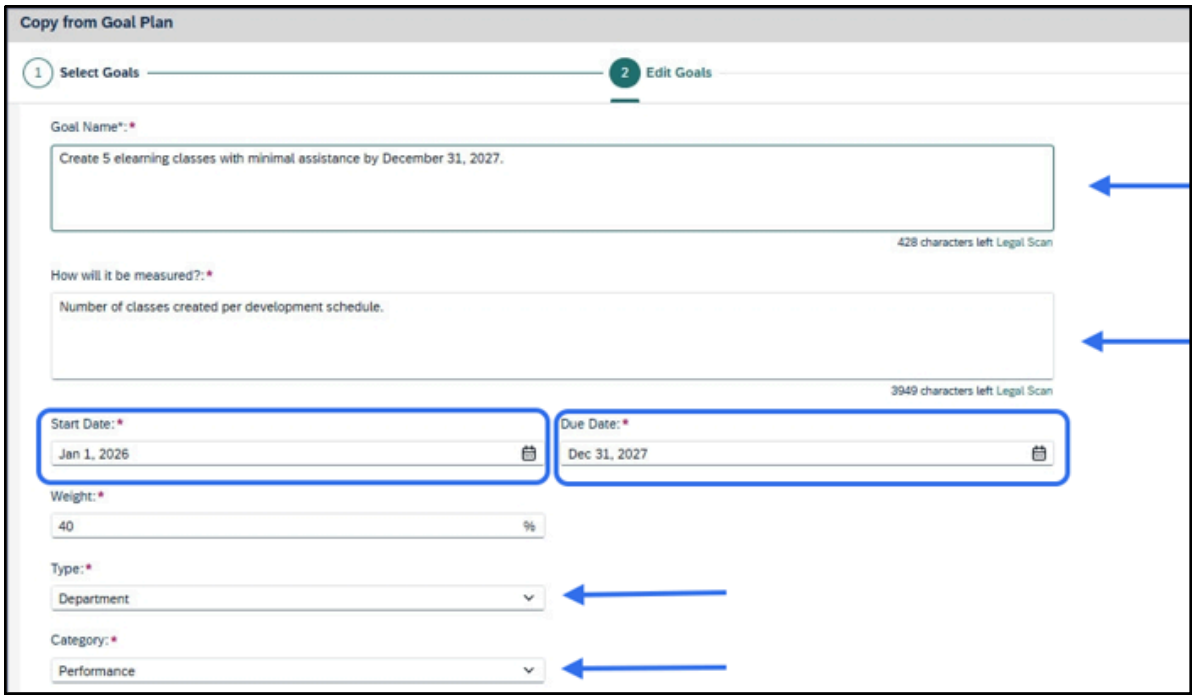
8 EDIT GOALS

You must edit each goal individually to continue in the copying process. Select the pencil icon to edit the goal(s).



9 EDIT GOAL DETAILS

- Edit any fields as needed.
- Change any dates in the Goal Name and metric as well as the Start and Due Date.
- Check the Type and Category fields and correct, as necessary.
- Then, select Next to return to the Select Goals step.



10 COPY & FINISH

- Select **Copy**.
- The goal has been added to the current Goal Plan and Planning Form.

