SAP SuccessFactors

PUBLIC

Document Version: 1H 2025 – 2025-04-04

Integrating SAP SuccessFactors with Qualtrics

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Content

1 Integrating SAP SuccessFactors with Qualtrics

By integrating your SAP SuccessFactors system with Qualtrics, you can add feedback opportunities on SAP SuccessFactors pages for your employees.

This guide is designed to help you configure your SAP SuccessFactors system to recognize and work with your Qualtrics projects, so that you can incorporate **creatives** into specific pages within your SAP SuccessFactors modules.

Considerations

- All the development and analysis of your surveys are done in your Qualtrics account, rather than in your SAP SuccessFactors system.
- All SAP SuccessFactors integrations are considered Employee Experience scenarios with Qualtrics, including feedback from external candidates when they apply for a job.

  > ⓘ Note
  >
  > A more robust set of capabilities specific to recruiting-related campaigns is available from Qualtrics through its separately licensed Candidate Experience program.

Basic Qualtrics Terms

The following are some basic Qualtrics terms to help you as you begin to create a project.

Term	Description
XM	The Qualtrics Experience Management platform.
EmployeeXM	A Qualtrics project type that specializes in researching the employee experience. SAP SuccessFactors uses EmployeeXM.
Website / App Feedback for EmployeeXM	The category of feedback for the projects that you use with SAP SuccessFactors in-app surveys.
Lifecycle	The category of feedback for the projects you use for SAP SuccessFactors email surveys.
Survey	An electronic form that investigates the opinions or experience of a group of people by asking them questions.

Term	Description
Creative	A graphic meant to act as an advertisement, announcement, or other attention-grabber, the creative is what appears on your SAP SuccessFactors page. The creative includes a link, which typically takes you to the actual survey. Examples include windows that pop over a page, or feedback tabs that appear in the corner of a page.
Intercept	An intercept consists of rules that you set up to specify the conditions under which someone sees a creative. The intercept is also where you set the target.
Target	The link text or button on a creative, that typically points to a survey. Where it goes is determined in the intercept.
Integration	An SAP SuccessFactors term that refers to the following: • SAP SuccessFactors-Qualtrics integration – the initial configuration that sets up the connection for SAP SuccessFactors and Qualtrics to work together. • Survey integration – connects a survey you create in Qualtrics, with a page in SAP SuccessFactors where you want the creative to appear, or to an event about which you want to send an email survey.

Related Information

Key Terms for Website Feedback (Qualtrics.com)
List of SAP SuccessFactors Product Areas and Components That Can Use Qualtrics [page 7]

2 List of SAP SuccessFactors Product Areas and Components That Can Use Qualtrics

The list of SAP SuccessFactors modules in which you can set up Qualtrics feedback opportunities.

Modules

Product Area	Component or Feature Group	Integration	Survey Type	Description	More Information
Compensation	Compensation Worksheet	Compensation and Variable Pay	In-app survey	Displays a feedback opportunity for Compensation for managers after they complete a compensation form.	In-App Survey Integrations for Compensation Form Completion [page 81]
Compensation Performance and Goals Succession & Development	Calibration Session	Calibration Session Finalization	Email survey	Sends email to employees for feedback when they finalize a Calibration session.	Email Survey Integrations for Calibration [page 92]
Employee Central	Global Assignment	Add Global Assignment	Email survey	Sends email to employees for feedback when they're given a global assignment.	Email Survey Integrations for Add Global Assignment [page 93]
Employee Central	Hire, Rehire, and Termination	Change in Department	Email survey	Sends email to employees for feedback when they change departments.	Email Survey Integrations for Change in Employee Department [page 95]
Employee Central	Hire, Rehire, and Termination	Change in Division	Email survey	Sends email to employees for feedback when they change divisions.	Email Survey Integrations for Change in Employee Division [page 96]
Employee Central	Hire, Rehire, and Termination	Change in Job Classification	Email survey	Sends email to employees for feedback when their job classification changes.	Email Survey Integrations for Change in Job Classification [page 97]
Employee Central	Hire, Rehire, and Termination	Change in Job Title	Email survey	Sends email to employees for feedback when their job title changes.	Email Survey Integrations for Change in Job Title [page 98]

Product Area	Component or Feature Group	Integration	Survey Type	Description	More Information
Employee Central	Hire, Rehire, and Termination	Change in Manager	Email survey	Sends email to new employees for feedback to find out what they thought a change in their manager.	Email Survey Integrations for Change in Manager [page 99]
Employee Central	Concurrent Employment	Concurrent Employment	Email survey	Sends email to employees for feedback when they're assigned to concurrent employment.	Email Survey Integrations for New Concurrent Employment [page 110]
Employee Central	Service Center	Employee Central Service Center	In-app survey	Displays a feedback opportunity in the Employee Central Service Center, when service tickets are resolved or closed.	In-App Survey Integrations for Employee Central Service Center [page 83]
Employee Central	Hire, Rehire, and Termination	Employee Hire	Email survey	Sends email to new employees for feedback to find out how they're doing with their new job.	Email Survey Integrations for Employee Hire [page 100]
Employee Central	Global Benefits	Employee Long Term Disability	Email survey	Sends email for feedback when an employee is absent because of a long-term disability.	Email Survey Integrations for Employee Long Term Disability [page 102]
Employee Central	Hire, Rehire, and Termination	Employee Rehire	Email survey	Sends email to employees for feedback after they're rehired.	Email Survey Integrations for Employee Rehire [page 101]
Employee Central	Global Benefits	Employee Short Term Disability	Email survey	Sends email for feedback when an employee is absent because of a short-term disability.	Email Survey Integrations for Employee Short Term Disability [page 103]
Employee Central	Hire, Rehire, and Termination	Terminating an Employment	Email survey	Sends email to employees for feedback before they leave the organization.	Email Survey Integrations for Terminating an Employment [page 111]

Product Area	Component or Feature Group	Integration	Survey Type	Description	More Information
Employee Central	Global Assignment	End Global Assignment	Email survey	Sends email to employees for feedback to find out what they thought about their experience with their global assignment.	Email Survey Integrations for End Global Assignment [page 104]
Employee Central	Hire, Rehire, and Termination	First Time Manager	Email survey	Sends email to new employees for feedback to find out how they're doing as a first-time manager.	Email Survey Integrations for First Time Manager [page 106]
Employee Central	Global Benefits	New Hire, Rehire, and Open Enrollment	In-app survey	Displays a feedback opportunity for employees after they successfully enroll in a benefit during an Open Enrollment period.	In-App Survey Integrations for Employee Central Global Benefits for New Hires, Rehires, and Open Enrollment [page 82]
Employee Central	Hire, Rehire, and Termination	Individual Contributor to Manager	Email survey	Sends email to managers for feedback when individual contributors become a manager with direct reports.	Email Survey Integrations for Individual Contributor to Manager [page 107]
Employee Central	Hire, Rehire, and Termination	Job Transfer	Email survey	Sends email to employees for feedback when they transfer jobs.	Email Survey Integrations for Job Transfers [page 108]
Employee Central	Hire, Rehire, and Termination	Manager to Individual Contributor	Email survey	Sends email to managers for feedback when they become an individual contributor and no longer have direct reports.	Email Survey Integrations for Manager to Individual Contributor [page 109]
Learning	Learning Assignments	Learning Completion	Email survey	Sends email to employees for feedback when they complete a Learning assignment.	Email Survey Integrations for Learning [page 112]
Platform	Home Page	Survey card	Direct link to Qualtrics survey	Employees selecting the link on a survey card are sent to a feedback opportunity in Qualtrics directly.	Showing a Survey Card on the Home Page [page 123]

Product Area	Component or Feature Group	Integration	Survey Type	Description	More Information
Succession & Development	Mentoring	Mentoring Program Completed	Email survey	Sends email to all mentors and mentees when the Mentoring program completes.	Email Survey Integrations for Mentoring Program Completion [page 115]
Succession & Development	Mentoring	Mentoring Ended	Email survey	Sends email to employees for feedback to find out what they think about having participated in the Mentoring program, when the mentoring relationship is closed by the other individual before the completion of the Mentoring program.	Email Survey Integrations for Mentoring Ended [page 114]
Succession & Development	Mentoring	End Mentoring	In-app survey	Displays a feedback opportunity for Mentoring after employees choose to close their relationship with their mentor or mentee before the program is completed.	In-App Survey Integrations for End Mentoring [page 86]
Onboarding	Internal Hire	Onboarding internal hires	Email survey	Sends email to employees for feedback to find out what they thought about their crossboarding experience.	Email Survey Integrations for Onboarding Internal Hires [page 116]
Onboarding	Offboarding	Offboarding	Email survey	Sends email to employees for feedback when you set up an offboarding process for them to leave the company.	Email Survey Integrations for Offboarding [page 119]
Onboarding	Onboarding	Onboarding new hires	Email survey	Sends email to employees for feedback to find out what they thought about their onboarding experience.	Email Survey Integrations for Onboarding New Hires [page 117]

Product Area	Component or Feature Group	Integration	Survey Type	Description	More Information
Performance and Goals	Form Assessment	Performance Review Form Page	In-app survey	Displays a feedback opportunity for specific route steps in the performance review process.	In-App Survey Integrations for Performance Reviews [page 87]
Recruiting	Career Site Builder	Career site pages	Feedback tab	Inserts JavaScript code in Career Site Builder to add Qualtrics feedback tabs in career site pages.	Adding a Feedback Tab to Recruiting Career Site Pages [page 121]
Recruiting	Job Applications	External Application Submission Internal Application Submission	In-app survey	Displays a feedback opportunity in a Recruiting career site for external and internal candidates after they successfully submit an application.	In-App Survey Integrations for Recruiting Application Submissions [page 90]
Recruiting	Applicant Status	Application Status Change	Email survey	Sends email to candidates for feedback to find out how they feel about the job application process they just went through.	Email Survey Integrations for Recruiting [page 120]
Compensation	Reward and Recognition	Awards	In-app survey	Displays a feedback opportunity after employees complete an award nomination form.	In-App Survey Integrations for Award Nominations [page 80]
SAP SuccessFactors Work Zone	Onboarding	Work Zone Content		Adds a feedback opporturnity at the end of a phase for the onboardees in the Onboarding Guided Experience.	Configuring a Qualtrics Survey in Onboarding Guided Experience

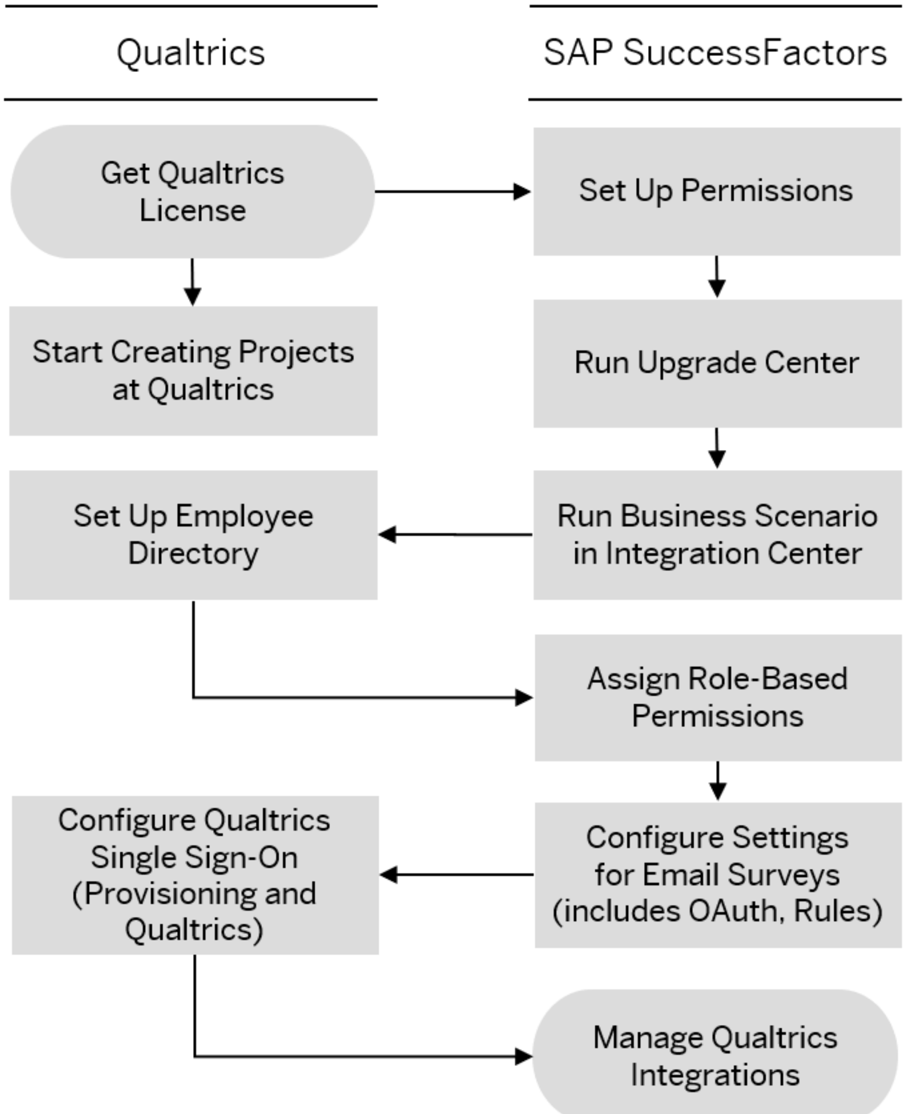
3 Overview of Steps to Set Up Qualtrics in SAP SuccessFactors

The process of setting up your integration involves configuring both your SAP SuccessFactors and Qualtrics accounts.

You begin by getting your Qualtrics license. After you complete your configuration, you can start adding Qualtrics feedback opportunities to your SAP SuccessFactors pages.

> Note
>
> You don't need to create an integration between SAP SuccessFactors and Qualtrics if you want to add a survey card on the home page. The link in the card sends employees to the survey at Qualtrics directly.

Once you've created your integration, your Qualtrics creative is visible and ready for users. You can go to your Qualtrics account at any time to view reports and analytics.



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Related Information

Showing a Survey Card on the Home Page [page 123]

4 Adding Your Qualtrics License and Account Information

Start setting up your integration between SAP SuccessFactors and Qualtrics by getting a license, an administrator login, and customer tenant URL from Qualtrics.

Procedure

1. Contact Qualtrics to obtain your Qualtrics Employee Experience (EmployeeXM) license.

   > **Note**
   >
   > A more robust set of capabilities specific to recruiting-related campaigns is available from Qualtrics through its separately licensed Candidate Experience program.

   Let your Qualtrics representative know that you're an SAP SuccessFactors customer, and that you plan to use Qualtrics with your SAP SuccessFactors system.
2. Obtain a Qualtrics administrator account that's associated with your Qualtrics license.

   Get this Qualtrics account when you get your license; it serves as the main Qualtrics administrator account you use to set up your projects at Qualtrics.
3. Get your account-specific customer tenant URL that Qualtrics assigns to you; you need to provide it when you install the Qualtrics feature in the Upgrade Center.

Next Steps

You can set up your permissions before you run the Upgrade Center. You can also start creating your projects in Qualtrics.

Related Information

Qualtrics Employee Experience (Qualtrics.com)

5 Creating Your Projects in Qualtrics

Start creating your projects in Qualtrics so that you can begin to set up feedback opportunities in your SAP SuccessFactors system as soon as you're done configuring your SAP SuccessFactors-Qualtrics integration.

Prerequisites

You have a Qualtrics Employee Experience license, which includes your Qualtrics administrator account and your customer tenant URL.

> Note
>
> A more robust set of capabilities specific to recruiting-related campaigns is available from Qualtrics through its separately licensed Candidate Experience program.

Context

All the Qualtrics projects you create to use in SAP SuccessFactors fall under the EmployeeXM (Employee Experience) category of **Website and app feedback** for in-app surveys and **Lifecycle** for email surveys.

Once you have your Qualtrics account, you can start creating your projects there even before you complete your SAP SuccessFactors-Qualtrics integration. You can then set up your Qualtrics feedback opportunities in your SAP SuccessFactors pages as soon as you finish setting up your configuration.

Procedure

1. Go to the Qualtrics.com Web site and log in with your administrator account.
2. Set up the feedback survey.
3. Determine how to distribute the survey, and who the participants are.
4. Configure your dashboards.
5. Decide how your visitors are prompted for feedback.
6. Configure and deploy your project.

Results

You've successfully created a project in Qualtrics, and it's now ready for use with SAP SuccessFactors.

Next Steps

Finish integrating Qualtrics with your SAP SuccessFactors system.

Related Information

Website / App Feedback for Employee XM (Qualtrics.com)
Getting Started with Employee Lifecycle
List of SAP SuccessFactors Product Areas and Components That Can Use Qualtrics [page 7]

6 Setting Up Permissions Before Upgrade Center

Set up permissions for those role-based permissions required to run Upgrade Center and Integration Center.

Prerequisites

You're logged in as the RBP Admin.

Procedure

1. Go to *Admin Center* > *Tools* > *Manage Permission Roles*.
2. Set up the following role-based permissions:

Module	Who is this Permission for?	Permission Location	Permission Name	Description
Administration	Admin	*Manage Integration Tools*	Access to Business Scenarios	Allows the administrator to access the Qualtrics integration business scenario.
Administration	Admin	*Manage Integration Tools*	Access to Integration Center	Allows the administrator to access the Integration Center.

Results

You're now ready to start your installation process in the Upgrade Center.

Related Information

Assigning Role-Based Permissions to Use Qualtrics with SAP SuccessFactors [page 37]
Allowing Access to Business Scenarios
Using Role-Based Permissions

7 Enabling Qualtrics from the Upgrade Center

Enable Qualtrics from the Upgrade Center, so that you can complete the implementation process to get Qualtrics to work in your SAP SuccessFactors system.

Prerequisites

- You have a Qualtrics license and know your Qualtrics tenant URL.
- Upgrade Center has been enabled in the instance.

Procedure

1. In the Admin Center, go to *Upgrade Center* > *Optional Upgrades* > *Qualtrics Employee Experience* and select *Learn More & Upgrade Now*.

   You see *Qualtrics Employee Experience*, with the following text:

   "Obtain a Qualtrics Employee Experience license before you run this upgrade. With your Qualtrics license, you can create Qualtrics feedback opportunities for your SAP SuccessFactors HCM suite users.

   "Before you enable this feature, log in to your Qualtrics account to obtain the Qualtrics URL associated with your license. You'll be providing this URL in the confirmation dialog when you choose Upgrade Now.

   "After you run the upgrade, you activate and configure a Qualtrics business scenario specific to your needs, and this forms an integration between SAP SuccessFactors and Qualtrics. This integration transmits a set of fixed fields and mappings that you keep intact; all you need to do is specify the destination and scheduling settings.

   "This business scenario creates an Admin Center option that lets you manage how you integrate Qualtrics feedback opportunities into your SAP SuccessFactors system.

   "You can undo this upgrade within 30 days."

   If you don't see this option, make sure you've assigned the necessary role-based permissions for business scenarios and the Upgrade Center.
2. Select *Upgrade Now*.

   The *Enter Qualtrics Server URL* dialog appears with the following text:

   "Enter the Qualtrics URL that you want to associate with your SAP SuccessFactors tenant, then select Validate.

   https://`<tenant_URL>`.qualtrics.com.

   Select Submit to accept. Select Cancel if the URL is not valid, or you want to cancel the upgrade."

   The *Submit* and *Cancel* buttons aren't enabled unless the URL you enter is valid.

3. Enter your tenant URL in this dialog, then select *Validate*.

Option	Description
The URL is valid if you see: `The URL is valid. Select Submit to continue the upgrade.`	Select *Submit*.
The URL is not valid if you see: `The URL you entered isn't valid. Enter the Qualtrics URL associated with your Qualtrics license and try again, or select Cancel to cancel the upgrade.`	Verify that you've entered the correct URL and select *Validate* again, or cancel the upgrade.

4. Select *Yes* to confirm and proceed.

   You see a confirmation message similar to the following:

   "Go to the Qualtrics integration definition business scenario specific to your needs and activate it, then configure your destination and scheduling settings.

   "After you finish running the business scenario, go to Qualtrics to set up your employee directory import automation.You then return to SAP SuccessFactors to finish setting up the rest of your role-based permissions.

   "After these steps, you’re ready to work in the Manage Qualtrics Integrations page.

Results

You've now completed the implementation process to enable Qualtrics to work with your SAP SuccessFactors system.

Next Steps

You're now ready to set up a Qualtrics business scenario in the Integration Center to configure and schedule the export of user data to Qualtrics.

8 Changing the Qualtrics Tenant URL in the Upgrade Center

You can change the URL associated with your Qualtrics account.

Context

All the survey integrations you create between SAP SuccessFactors and Qualtrics rely on the tenant URL that you provide at the time that you run *Qualtrics Employee Experience* in the Upgrade Center.

If you need to change this tenant URL, you can do so within 30 days of enabling *Qualtrics Employee Experience* in the Upgrade Center. The process involves simply undoing the upgrade and running it again with a different URL.

> Note
>
> If it's been longer than 30 days since you enabled *Qualtrics Employee Experience* using your previous Qualtrics URL, the Upgrade Center prohibits you from undoing the upgrade, which means that you can't change the URL. If this happens, go to *Platform Feature Settings* from the Admin Center, and select *Enable Qualtrics Feature*. This allows you to run *Qualtrics Employee Experience* again, so that you can enter your new Qualtrics tenant URL.

Procedure

1. In the Admin Center, go to *Upgrade Center* > *Completed Upgrades* and search for *Qualtrics Employee Experience* in the list.
2. Choose *Undo* from the *Actions* column on the right.

   The current status changes from *Feature Enabled* to ✓ *Undo - Successful*.
3. Select *Qualtrics Employee Experience* to restart a new upgrade process.
4. In the *Qualtrics Employee Experience* dialog, select *Upgrade Now*.

   The *Enter Qualtrics Server URL* dialog appears with the following text:

   ```
   Enter the Qualtrics URL that you want to associate with your
   SAP SuccessFactors tenant, then select Validate.

   https://<tenant_URL>.qualtrics.com.

   Select Submit to accept. Select Cancel if the URL is not
   valid, or you want to cancel the upgrade.
   ```

   The *Submit* and *Cancel* buttons aren't enabled unless the URL you enter is valid.
5. Enter your updated tenant URL in this dialog, then select *Validate*.

Option	Description
The URL is valid if you see: `The URL is valid. Select Submit to continue the upgrade.`	Select *Submit*.
The URL is not valid if you see: `The URL you entered isn't valid. Enter the Qualtrics URL associated with your Qualtrics license and try again, or select Cancel to cancel the upgrade.`	Verify that you've entered the correct URL and select *Validate* again, or cancel the upgrade.

6. Select *Yes* to confirm and proceed.

   The upgrade process completes, with your new tenant Qualtrics URL associated with your SAP SuccessFactors account.

9 When to Enable Qualtrics in the Platform Feature Settings

The Platform Feature Settings in the Admin Center gives you the ability to enable or disable your Qualtrics integration with SAP SuccessFactors.

The *Enable Qualtrics Feature* field, located in *Admin Center* > *Platform Feature Setttings*, is used in the following situations:

- When you perform an instance refresh, select *Enable Qualtrics Feature* to re-enable your Qualtrics integration.
- If you installed the Qualtrics feature from the Upgrade Center over 30 days ago and you now want to disable it from your SAP SuccessFactors system entirely, unselect *Enable Qualtrics Feature*.
- If you installed the Qualtrics feature from the Upgrade Center, then uninstalled it through the Upgrade Center or disabled it by unselecting *Enable Qualtrics Feature* and you now want the feature available again, select *Enable Qualtrics Feature*.

10 Qualtrics and the SAP SuccessFactors Configuration Transport Center

Don't use the Qualtrics option in the Configuration Transport Center to copy your Qualtrics settings.

The *View Configurations* tab in the SAP SuccessFactors Configuration Transport Center (which you access at *Admin Center* > *Configuration Transport Center*) includes two options: *Download Mode* and *Transport Mode*.

> ⚠ Caution
>
> Although the Configuration Transport Center includes Qualtrics options, they aren't supported. For example, don't copy your Qualtrics settings from one instance to another. These settings alone aren't enough to set up the Qualtrics feature.

The `Qualtrics` options in the *Configuration Area* field are:

- *Download Mode* – this option downloads a compressed set of XML with your configuration settings. This set of XML files, however, aren't used to configure or implement your Qualtrics integration.
- *Transport Mode* – includes `Qualtrics` as an option, but isn't supported.

Related Information

Exporting SAP SuccessFactors Application Configurations Using Configuration Center (Using the Configuration Center guide)

11 Enabling Qualtrics After an Instance Refresh

The instance refresh process (typically used to move from a Preview to Production environment) automatically disables the Manage Qualtrics Integration feature in the target instance to prevent your system from immediately starting up Qualtrics surveys before you're ready for them to begin.

Prerequisites

If you created any email surveys in *Manage Qualtrics Integrations* using Intelligent Services events, the instance refresh process disables all of them automatically. For this reason, make sure you note which email surveys you want to reactivate after the refresh is finished.

Context

> Note
>
> The only scenario in which there are no actions for you to take, is if the Qualtrics feature isn't enabled in either target or source instances.

Procedure

1. In the target instance after the instance refresh, go to *Admin Center* > *Platform Feature Setttings* in the target instance and enable the *Enable Qualtrics Feature* option.

   Manage Qualtrics Integrations is available as an option in the Admin Center.
2. In the target instance, go to *Admin Center* > *Manage Qualtrics Integrations* > *Email Surveys* to re-enable email survey integrations.

   All email surveys are automatically disabled; select the email survey integrations you want to re-enable.
3. In the target instance, go to *Admin Center* > *Manage Qualtrics Integrations* > *In-App Surveys* to verify that all your settings for your in-app survey integrations look OK.

   In-app surveys aren't automatically disabled during the instance refresh process. Instead, they retain the same active and inactive settings as you had in the source instance.

12 Configuring the Qualtrics Business Scenario in the Integration Center

Run a business scenario in the SAP SuccessFactors Integration Center to set up a schedule to submit your employee data from SAP SuccessFactors to a secure file transfer protocol (SFTP) server, so that the data can be sent to Qualtrics.

Prerequisites

- Qualtrics is installed through the Upgrade Center.
- You have an SFTP server to which you send your employee data.

Context

A complete integration of your system involves a two-part process. The first is to run this business scenario, which compiles your employee data into a CSV-format file that's sent to an SFTP server. The second part involves configuring Qualtrics to automatically import this employee data from the SFTP server into the Qualtrics employee directory for your account.

This SAP SuccessFactors-Qualtrics business scenario integration differs from a Qualtrics survey integration:

- **A business scenario integration** – is a one-time configuration that creates a bridge between your SAP SuccessFactors and Qualtrics accounts to maintain synchronized employee data.
- **A survey integration** – connects surveys you create in Qualtrics, with either an SAP SuccessFactors page where you want the surveys' creative to appear, or with Intelligent Services events that trigger an email survey. You control the integrations of both in-app and email survey types from the Manage Qualtrics Integrations page in the SAP SuccessFactors Admin Center.

> ⚠ Caution
>
> In addition to the required fields — user ID, first name, last name, and email address — the CSV template file includes additional fields such as department, division, location, role, and so on.
>
> Any data in these additional fields become stored in Qualtrics. If you don't want to send this extra information to Qualtrics in the CSV file, remove the optional fields from the template.
>
> Don't use the email address as the unique identifier for the Qualtrics employee directory. Use only the user ID, which is already included as part of your business scenario configuration.

> → Recommendation
>
> To minimize data volume and performance-related issues, read audit logging for OData API reads is disabled by default. For this reason, don't transfer any sensitive data to Qualtrics because the data isn't encrypted. If you

inadvertently (or must) send sensitive data through a user data export to Qualtrics, open a support ticket to turn on read audit logging at the tenant level, where logging is enabled for everything.

Procedure

1. Go to the SAP SuccessFactors Integration Center.

Option	Description
If you just completed installing Qualtrics from the Upgrade Center and you're still at the confirmation dialog:	Select *Business Scenarios* from the dialog. The *Business Scenarios* page appears in a new browser window.
If you exited the Upgrade Center after the installation:	Go to *Admin Center* > *Business Scenarios*.

You see a scenario called *Qualtrics Integration Definition - Basic User Export to SFTP* in your list of integrations.

> Note
>
> If you have Employee Central, the name of the business scenario you see is *Qualtrics Integration Definition - EC User Export to SFTP*.

If you don't see this scenario, you might not have installed *Qualtrics Employee Experience* in the Upgrade Center, or you might not have enabled the role-based permissions for business scenarios and the Integration Center. If you performed the upgrade successfully and you still can't find the scenario, contact Technical Support.

2. In the *Qualtrics Integration Definition - Basic User Export to SFTP* business scenario, move the slider to *On* in the Active column.
3. Select *OK* when you see a confirmation similar to `Are you sure you want to configure this scenario?`

   You see a message similar to `Scenario activated successfully`, and you see a page with integration definition details.
4. View — but don't modify — the prepopulated details that appear in the page with integration definitions, and select *Next*.

Field Name	Description of Fields You Don't Modify
Integration Name	`Qualtrics Integration Definition - Basic User Export to SFTP`
Description	"This uses secure file transfer protocol to export your SAP SuccessFactors user data (`UserID`, `First Name`, `Last Name`, and `Email` fields) to Qualtrics so that you can enable online surveys for your users."
Read Access Logging	This field is automatically enabled by default, and allows you to monitor the exchange of sensitive data.
Output file type	`CSV`
File delimiter	Blank
Header type	`Simple Header`

Field Name	Description of Fields You Don't Modify
Footer type	`No Footer`
Use double quotes	This check box is grayed out and can't be selected.
Ignore double quotes for null values	This check box is grayed out and can't be selected.

The Configure Fields page appears, and begins to populate the page with a table consisting of a list of your employees.

5. Select *Next* after the Configure Fields page finishes showing the table of your employees.

   You don't need to add or change anything in the Configure Fields page; the table contains your employees' user IDs, first names, last names, and email addresses. This data is transferred to Qualtrics so that Qualtrics knows who your employees are, allowing Qualtrics to provide better reporting on feedback data, even though participant information is anonymous to you.

   The Filter and Sort page appears.
6. In the Filter and Sort page, select *Next*.

   You don't need to configure anything on this page.

   The Destination Settings page appears.
7. Complete the following fields in the Single Destination section of the Destination Settings page, then select *Next*.

   > ⓘ Note
   >
   > You can continue to the next screen without completing these required fields, but the final integration command doesn't proceed until you provide this information.

Required Fields	Information You Provide
SFTP Server Host Address	The address of your secure FTP server where your CSV file goes.
Port	Keep the default value of "22".
SFTP User Name	The account name for the user from your organization accessing the SFTP server host — typically your SAP SuccessFactors administrator.
SFTP Password	The SFTP user's password.

The Destination Settings page includes additional fields:

Optional Fields	Description
Authentication Key	(Don't modify) The field is already populated with `No Key Authentication`.
File Name Prefix	(Don't modify) The field is already populated with `EMPLOYEE_EXPORT`.
Data Suffix Format	(Don't modify) The field is already populated with `None`.
File Extension	(Don't modify) The field is blank.
File Folder	By default, the file is transferred to the root directory (`/`) of your SFTP server host.

You can ignore the *Multiple Destinations* and *Advanced Settings* sections for now.

You're returning to this page to complete the *Advanced Settings* section to add PGP encryption information later.

The Scheduling page appears, with the scheduling option showing as `Suspended/Not Scheduled`.

8. Decide when to run the integration, then select the scheduling option field:

Option	Description
To run the integration once:	Choose *Once*, then select *Next*.
(Recommended) To send the employee information through SFTP on a regular schedule:	Choose *Hourly*, *Daily*, *Weekly*, *Monthly*, or *Yearly*, then select *Set Schedule*. When you choose this option, the following fields appear: • *Start Time* • *Ending On* • *Email To*

> → Recommendation
>
> Set up a regular schedule — optimally daily — to ensure that Qualtrics always has your most current employee data that reflects changes from new hires, terminations, and so on.

The Review and Run page appears.

9. Save these settings after you verify that all your configuration information is correct in the Review and Run page, then select *Run Now*.

   If your settings are incomplete, an error message tells you what fields you're missing.

   If you find duplicate records in the SFTP file even if you don't have any duplicate employee records in SAP SuccessFactors, refer to *KBA 2776691 - Employee export via Integration Center jobs generating duplicate records* for instructions on how to avoid this issue.

Results

You've successfully completed the first part of your SAP SuccessFactors-Qualtrics integration by running the business scenario to set up a regularly scheduled transfer of employee data to your SFTP server.

Next Steps

You're now ready for the second part of your integration: Configure Employee Directory Import Automations on Qualtrics to sync your employee data from SAP SuccessFactors to the Qualtrics employee directory on a regular schedule.

Related Information

The Manage Qualtrics Integrations Feature in the Admin Center [page 64]

Configuring Business Scenarios

Using the Integration Center

SAP Note 2776691

13 Upgrading Qualtrics Business Scenarios

If you already have an SAP SuccessFactors-Qualtrics integration, verify that you're using the current Qualtrics business scenario.

Context

If you have an existing SAP SuccessFactors-Qualtrics integration, it may be configured with a legacy business scenario that uses some outdated settings. These steps show you how to find out whether you need to update your business scenario, as well as how to replace it with an updated, current version.

Procedure

Go to *Admin Center* > *Business Scenarios*.

Option	Description
You see *SAP Qualtrics Integration Definition – User Export to SFTP* **with the following settings:** • *Active* **is set to** *ON* • *Status* **displays** *Saved*	This particular business scenario is out of date. Rather than upgrading it, you need to delete it. ⚠ Caution You can't retrieve this legacy business scenario after you delete it. Take note of any particular settings you configured in it in case you want to apply them to the updated business scenario. To delete this business scenario, choose the (*Delete Integration*) icon and confirm the deletion. In its place, you see *Qualtrics Integration Definition – Basic User Export to SFTP* (or *Qualtrics Integration Definition – EC User Export to SFTP* if you use Employee Central), which you then install. You can enable and configure this new business scenario by moving the slider in the *Active* column to *ON*. Selecting *OK* in the confirmation dialog that appears, immediately takes you into the business scenario's configuration pages. Follow the steps in *Configuring the Qualtrics Business Scenario in the Integration Center* to complete the integration.
You see either *Qualtrics Integration Definition – Basic User Export to SFTP* **or** *Qualtrics Integration Definition – EC User Export to SFTP* **with the following settings:** • *Active* **is set to** *ON*	Look at the icons in the *Actions* column for the business scenario: • If the ⇣ *down arrow* icon is grayed out, SAP SuccessFactors-Qualtrics integration is using the most current business scenario, and you don't have any additional steps to perform.

Option	Description
• *Status* **displays** *Saved*	• If the ⇣ *down arrow* icon is interactive and displays *Upgrade* when you hover over it, the business scenario is out of date. The business scenario continues to work, but until you perform the upgrade, the *Read Access Logging* setting is unavailable. Select the icon to upgrade the business scenario and confirm the upgrade. The business scenario automatically opens to the *Options* screen, and you can navigate through the screens to make sure the settings are correct. The upgrade completes only when you save the scenario.
You see either *Qualtrics Integration Definition – Basic User Export to SFTP* **or** *Qualtrics Integration Definition – EC User Export to SFTP* **with the following settings:** • *Active* **is set to** *OFF*	Your system doesn't yet have an SAP SuccessFactors-Qualtrics integration. Use the steps described in *Configuring the Qualtrics Business Scenario in the Integration Center*.

Results

You now see *Qualtrics Integration Definition – Basic User Export to SFTP* (or *Qualtrics Integration Definition – EC User Export to SFTP* if you use Employee Central) in *Business Scenarios*.

Next Steps

Enable and configure this new business scenario by moving the slider in the *Active* column to *ON*. Selecting *OK* in the confirmation dialog that appears, immediately takes you into the business scenario's configuration pages. Follow the steps in *Configuring the Qualtrics Business Scenario in the Integration Center* to complete the integration.

Related Information

Configuring the Qualtrics Business Scenario in the Integration Center [page 26]

14 Configuring Employee Directory Import Automations in Qualtrics

After you set up a regularly scheduled transfer of your employee data from SAP SuccessFactors to your SFTP server, configure your Qualtrics settings so that your employee data is then imported from your SFTP server into the Qualtrics employee directory for your account.

Prerequisites

You performed the first part of your SAP SuccessFactors-Qualtrics integration by running the Integration Center business scenario to set up a regularly scheduled transfer of your employee data to your SFTP server.

Context

Qualtrics uses an employee directory to provide reports that contain more details from your employee feedback, even though personal information is anonymized and your employees aren't identified in your reports.

The person who sets up the configuration of the Qualtrics employee directory — such as your SAP SuccessFactors administrator — needs know the location of, and have access to, your SFTP server.

All the steps you perform to configure your Qualtrics employee directory, such as specifying your SFTP server and setting up a regular schedule, are described in *Employee Directory Import Automations (EX)* at the Qualtrics Web site.

> → Recommendation
>
> To minimize data volume and performance-related issues, read audit logging for OData API reads is disabled by default. For this reason, don't transfer any sensitive data to Qualtrics. If you inadvertently (or must) send sensitive data through a user data export to Qualtrics, open a support ticket to turn on read audit logging at the tenant level, where logging is enabled for everything.

Procedure

1. Log in to your Qualtrics administrator account.
2. In the *Automations* tab of your Qualtrics directory, start configuring your Employee Directory Import Automations settings.
3. In the *Select Import File* section, choose `Yes` for the question *Do you plan to encrypt the files before upload?*
4. Select *Continue*, then choose *Download our Public Key*.

   The Qualtrics public PGP key, `pgppublickey.asc`, is downloaded to your machine immediately.

5. Continue performing the rest of your Employee Directory Import Automations configurations.

Results

You've now completed the Qualtrics side of your SAP SuccessFactors-Qualtrics integration.

Next Steps

Set up PGP encryption for your SFTP file with the public PGP key you downloaded.

Related Information

Qualtrics Employee Directory Import Automations (EX) (Qualtrics.com)

15 Setting Up PGP Encryption for the SFTP File

Apply the public PGP key you got from Qualtrics to your business scenario so that your SFTP file is encrypted.

Prerequisites

You've set up Employee Directory Import Automations in your Qualtrics account, specifying that you wanted to encrypt the data, and downloaded the Qualtrics PGP key.

You have role-based permission access to import a key in *PGP Key Management*.

Context

> → Recommendation
>
> Although it's possible to run your *SAP Qualtrics Integration Definition – User Export to SFTP* business scenario without encrypting your data, configure PGP encryption to increase the security of personnel information.

Procedure

1. Return to your SAP SuccessFactors, then in the Admin Center, go to *PGP Key Management*.
2. In *PGP Key Management*, select the *Import a Key* button.
3. Select the `pgppublickey.asc` Qualtrics public PGP key that you downloaded, then specify `Qualtrics_PGP` as its file name.
4. Go to *Business Scenarios* and select *SAP Qualtrics Integration Definition – User Export to SFTP* to edit.
5. In the business scenario, go to the *Destination Settings* page.
6. In the *Advanced Settings* section, select the pulldown list for the *File Encryption* field and choose `Qualtrics_PGP`, then choose *Next*.
7. Bypass the *Scheduling* page then select *Run now* in the *Review and Run* page.

Results

You've now completed your SAP SuccessFactors-Qualtrics integration.

Next Steps

Set up role-based permissions for your users so they can access the Manage Qualtrics Integrations page in the SAP SuccessFactors Admin Center, where you create Qualtrics survey integrations.

> **Note**
>
> A Qualtrics survey integration is different from this business scenario integration you performed. The business scenario created a bridge between your SAP SuccessFactors and Qualtrics accounts to maintain synchronized employee data. Survey integrations connect intercepts you create in Qualtrics projects, with pages in SAP SuccessFactors where you want creatives to appear.

Related Information

Step 3: PGP Encryption in Employee Directory Import Automations (EX) (Qualttrics.com)

16 Assigning Role-Based Permissions to Use Qualtrics with SAP SuccessFactors

Set up role-based permissions required to use Qualtrics with SAP SuccessFactors.

Prerequisites

You're logged in as the RBP Admin.

Procedure

1. Go to *Admin Center* > *Tools* > *Manage Permission Roles*.
2. Set up the following role-based permissions:

Module	Who is this Permission for?	Permission Location	Permission Name	Description
Administration	Admin	*Admin Center Permissions*	*Access Qualtrics Integration*	Allows administrators to access the *Manage Qualtrics Integrations* page in the Admin Center.
Administration	Admin, User	*Admin Center Permissions*	*Show Qualtrics in Main Navigation Menu*	Allows users to see a link to the Qualtrics Web site from the main navigation menu.

Module	Who is this Permission for?	Permission Location	Permission Name	Description
Administration	Admin, User	*Miscellaneous Permissions*	*QualtricsProjectAndSiteData*	**Administrators**: Allows admins to access the *In-App Survey* tab in the *Manage Qualtrics Integrations* page in the Admin Center. Assign administrators with `Edit` permission. Note The *In-App Survey* tab isn't visible to admins who don't have `Edit` permission for QualtricsProjectAndSiteData. **Users**: Allows users to be able to see Qualtrics in-app surveys in SAP SuccessFactors. Assign users with `View` permission. Note The In-App Survey tab isn't visible to users who don't have `View` permission for QualtricsProjectAndSiteData.

Module	Who is this Permission for?	Permission Location	Permission Name	Description
Administration	Admin, User	*Miscellaneous Permissions*	*QualtricsEmailSurveyData*	**Administrators**: Allows admins to access the *Email Survey* tab in the *Manage Qualtrics Integrations* page in the Admin Center. Assign administrators with `Edit` permission. ⓘ Note The *Email Survey* tab isn't visible to admins who don't have `Edit` permission for QualtricsEmailSurveyData. **Users**: Allows users to be able to see Qualtrics surveys within emails that are generated from events in SAP SuccessFactors. Assign users with `View` permission. ⓘ Note The Email Survey tab isn't visible to users who don't have `View` permission for QualtricsEmailSurveyData.
Administration	Admin	*Metadata Framework*	*Configure Business Rules*	Enables the ability to create, edit, and execute business rules that are used by some email survey integrations.

Module	Who is this Permission for?	Permission Location	Permission Name	Description
Intelligent Services	Admin	*Intelligent Services Tools*	*Event Center*	Allows a user to enable Intelligent Services.

Related Information

Setting Up Permissions Before Upgrade Center [page 18]
Using Role-Based Permissions

17 Setting Up Single Sign-On for Qualtrics

You can set up single sign-on (SSO) for Qualtrics as you can for SAP SuccessFactors, so that going to the Qualtrics Web site from SAP SuccessFactors automatically logs you in and takes you to your Qualtrics account.

Prerequisites

- The transfer of employee data using SFTP through the business scenario has been established, and the import automation of the Qualtrics employee directory has been configured.

  > ⚠ Caution
  >
  > Don't use the email address as the unique identifier for the Qualtrics employee directory. Use only the user ID, which is already included as part of your business scenario configuration.

- Role-based permissions have been assigned.
- You have access to 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.

Context

Follow these steps if you want to set up SAP SuccessFactors as Identity Provider (IDP) and Qualtrics as your service provider.

> → Tip
>
> The Identity Authentication service is also supported as an IDP for Qualtrics, and is the recommended choice for Qualtrics integration to SAP SuccessFactors. Refer to Create SAML 2.0 Application to complete this setup on the Identity Authentication side.
>
> Next, to establish trust between Qualtrics and Identity Authentication, follow the guidelines on Configuring SAML as an Identity Provider . The information here provides the process on connecting Qualtrics to an IDP.

When you set up single sign-on for Qualtrics with this method, users are automatically logged in to their Qualtrics accounts when they select the Qualtrics Web site link from the main navigation menu.

> ⓘ Note
>
> Logging out of SAP SuccessFactors doesn't automatically log users out of Qualtrics.

Procedure

1. Go to the following URL to get the IDP metadata from your SAP SuccessFactors system, where:
    - `<instance_URL>` – is your SAP SuccessFactors system URL.
    - `<companyID>` – is your SAP SuccessFactors company ID.

    SAP SuccessFactors

    ```
    http://<instance_URL>/idp/samlmetadata?company=<companyID>
    ```

    If the browser asks you what you want to do with the metadata, save the file.
2. Begin to fill out the SSO Implementation form at the Qualtrics Web site.

    This form asks you to provide details such as contact information, Qualtrics license information, technical configuration details, and additional configuration settings.
3. Submit your saved metadata file in the section of the SSO Implementation form that lets you upload it.

    Optionally, you can email the metadata file to Qualtrics support.

    If Qualtrics needs the attributes that are sent through SAML, you can obtain this information by installing a SAML tracer browser plug-in to capture the SAML response.
4. In Provisioning, go to *Service Provide Settings* > *Authorized SP Assertion Consumer Service Settings*.
5. In the *Authorized SP Assertion Consumer Service Settings* page, enter and save the following values, where `<qualtrics_datacenter>` is the name of the data center the organization set up on Qualtrics:

Field Name	Value
Assertion Consumer Service	`https://<qualtrics_datacenter>.qualtrics.com/login/v1/sso/saml2/default-sp/sf/idp-init/sso/`
SP Mapping Key	Although you can use any value for this key, consider using an easy-to-identify term such as `qualtrics` or `qualtricsintegration`.

    The resulting URL uses the following format:

    ```
    https://<qualtrics_datacenter>.qualtrics.com/login/v1/sso/saml2/default-sp/sf/
    idp-init/sso/qualtricsintegration
    ```

    Users are now recognized when they go to the Qualtrics Web site.

    From within the SAP SuccessFactors Web application, users can get to the Qualtrics Web site by selecting *Qualtrics* from the main navigation menu (the menu that they can access in the top left of the screen). This option opens a **new browser window** to their Qualtrics account landing page so that they can work in Qualtrics simultaneous to their work in the Admin Center.

Related Information

Single Sign-On (SSO) Basic Overview (Qualtrics.com)
Assigning Role-Based Permissions to Use Qualtrics with SAP SuccessFactors [page 37]
SSO Implementation Form (Qualtrics.com)

SAP Note 2912495

SAP Note 2707993

18 Data Protection and Privacy in SAP SuccessFactors Integrations with Qualtrics

The entire SAP SuccessFactors HCM suite includes comprehensive data protection and privacy features, and encompasses those modules in which you can have a Qualtrics integration.

The following are some data protection and privacy features that are pertinent to SAP SuccessFactors integrations with Qualtrics.

For more information about data protection and privacy in your SAP SuccessFactors system, see *Implementing and Managing Data Protection and Privacy* on the SAP Help Portal.

SAP SuccessFactors Secure File Transfer Protocol (SFTP) Purge Policy

The process of integrating SAP SuccessFactors to Qualtrics includes the transmitting of employee data from SAP SuccessFactors to Qualtrics through a secure FTP. See *SAP Knowledge Base Article 2620488* for the most up-to-date information on our SFTP purge policy.

Qualtrics GDPR Compliance

For information on Qualtrics data protection and privacy compliance, see *Qualtrics & GDPR Compliance*.

Related Information

Implementing and Managing Data Protection and Privacy
SAP Knowledge Base Article 2620488 - SuccessFactors SFTP service Purge Policy update
Qualtrics & GDPR Compliance (Qualtrics.com)

19 Proxy Behavior with Qualtrics Integrations

The behavior of a user logged in as a proxy when accessing Qualtrics-related activities differs depending on what the user is doing.

- If you're logged in as a proxy of an SAP SuccessFactors administrator, you can go to the Manage Qualtrics Integrations page in the Admin Center and perform all of the available actions with Qualtrics integrations.
- You can't take a Qualtrics survey as a user when you're logged in as that person's proxy in SAP SuccessFactors. That is, you can't take a survey that was meant for the person you're proxying.

The following table provides example scenarios what you can see and do based on what account you're logging in as:

- User **adminb1** – has all permissions enabled, including to Admin Center, Qualtrics objects, admin pages, and so on.
- User **adminb2** – has all permissions enabled, including to Admin Center, Qualtrics objects, admin pages, and so on.
- User **233** – only has permission to access Admin Center, and nothing else.
- User **455** – only has permission to access Admin Center, and nothing else.

Who You're Logged In As	Who You Proxy In As	Result
adminb1, with permissions enabled	**233**, with access only to Admin Center	Manage Qualtrics Integrations isn't visible.
233, with access only to Admin Center	**adminb1**, with permissions enabled	Manage Qualtrics Integrations is visible. Integrations can be changed and saved.
adminb1, with permissions enabled	**adminb2**, with permissions enabled	Manage Qualtrics Integrations is visible. Integrations can be changed and saved.
233, with access only to Admin Center	**455**, with access only to Admin Center	Manage Qualtrics Integrations isn't visible.

20 Enabling Locales and Translations in Qualtrics

You can provide participants with an option to take surveys in additional languages.

Context

Participants can only see Qualtrics surveys in those languages for which you provide a translation. For example, if you provide a survey in English and Spanish, participants can't view the survey in German, regardless of which of the following methods they use.

> Note
>
> **In SAP SuccessFactors Recruiting** – the languages you enable in *Manage Recruiting Languages* in the SAP SuccessFactors Admin Center aren't synchronized to the languages that you see in the dropdown list of your Qualtrics survey. In addition, even if you have multiple locales set up in Career Site Builder, you still need to provide a translation for those languages in Qualtrics in order for them to be available to survey participants.

Procedure

Translate your survey into additional languages in Qualtrics.

After you've translated your survey, participants have two methods by which to view it in a different language:

Method	Description
Automatic language detection	When participants start the survey, Qualtrics checks their browser settings to see which language they use to browse the Internet: • If your survey exists in the language the participants are using, the survey automatically displays in that language, and there's no additional action for them to perform. • If your survey doesn't exist in the language the participants are using, the survey displays in the default language.

Method	Description
Participant language selection	If participants want to take your survey in a language other than the default language, they can select a different language from a dropdown list on the top right of the survey. This list displays all the language selections that you provided translations for. For example, if you translated your English language survey into German and Spanish, the menu shows English, German, and Spanish.

Related Information

Translate Survey (Qualtrics.com)

21 Enabling Mobile Surveys for Performance Reviews

Enable this setting to configure Qualtrics survey integrations for performance reviews in the native SAP SuccessFactors Mobile app, so that participants see a mobile-friendly version of an in-app survey for performance reviews.

Context

Enabling this setting allows you to select *Integration for Mobile* when you create a Qualtrics integration specifically for Employee Signature step A on Performance Forms.

Procedure

1. Log in to your Qualtrics account, and configure your Qualtrics survey settings for mobile optimization.
2. Return to SAP SuccessFactors, and select *Enable Mobile Features* from the Admin Center.

   You're taken to the *Enable Mobile Features* tab in the *Mobile Settings* page.
3. In the *Enable Mobile Features* tab, go to the following depending on which version of *Mobile Settings* you're using:

Option	Description
NextGen Mobile Settings	Select the *Modules* tab, then select *Performance Review* in the *Talent* section.
Legacy (old) Mobile Settings	Scroll down to *Modules* > *Talent* and select *Performance Review*.

Results

You have now enabled mobile surveys in *Manage Qualtrics Integrations* for performance reviews.

Next Steps

You can now go to the Manage Qualtrics Integrations tool to create Qualtrics integrations for performance reviews for Employee Signature step A on Performance Forms, and specify the *Integration for Mobile* option.

Related Information

In-App Survey Integrations for Performance Reviews [page 87]

Mobile Survey Optimization (Qualtrics.com)

Mobile Deployment Guide

22 Configuring Surveys to Prevent Repeated Displays

Configure settings for Qualtrics surveys to prevent the same survey from appearing more than once.

Context

Qualtrics offers two methods for preventing a survey from appearing more than once. The method you choose depends on the experience you want the participants to have.

Procedure

- **Prevent a survey from displaying a second time regardless of whether the participant takes the survey or not.**

  For this scenario, you use the *Repeated display prevention* option, which places a cookie on the browser to prevent the repeated display of a survey popup. This setting also allows you to set a time duration before the popup appears again.

  In this example, an employee or manager who chooses *No thanks* wouldn't see the survey request again for the duration you specify (such as an hour, a week, and so on).
- **Prevent a survey from displaying a second time only after a participant takes the survey.**

  For this scenario, you create a survey condition that associates display logic to your intercept. You can then configure the condition such that participants continue to see a survey popup until they take the survey. Once the survey is taken, the popup goes away and doesn't reappear.

  In this example, managers who choose *No thanks* for a survey popup after the first form in a multistep process (such as for performance reviews), would continue to see survey popups in the subsequent steps. In this case, the survey popups continue to appear until the managers take and complete the survey.

Related Information

Repeated Display Prevention & Cookie Domain (Qualtrics.com)
Qualtrics Survey: To Set a Qualtrics Survey Condition (Qualtrics.com)

23 Enabling a Qualtrics Authentication in the Integration Service Registration Center

Before you can create a new email survey integration for some feedback opportunities, you need to register your tenant as a common gateway for integration services.

Context

The process securely stores such information as client credentials and endpoint URL by using the values for the fields you set up in the Security Center, as described in *Creating Outbound OAuth Configurations for Qualtrics APIs*.

The following email survey integrations require you to enable a Qualtrics authentication in the Integration Service Registration Center:

- Learning: Assignment completion
- Employee Central: Change in Employee Department
- Employee Central: Change in Employee Division

Procedure

1. Go to *Admin Center* > *Integration Service Registration Center*.
2. Select *Qualtrics* in the *Integration Service* field.

   The *Service Details* section appears.
3. Complete the following fields in the *Service Details* section:

Option	Description
Destination URL	The account-specific customer tenant URL that Qualtrics assigned to you.
OAuth URL	The token URL that you obtained from your Qualtrics account settings when you created your OAuth settings.
Client ID	The long string from your Qualtrics account settings you used to create your OAuth settings.
Client Secret	The long string you obtained from Qualtrics when you created your OAuth settings. The data is masked when you enter it in this field.

4. Choose *Register* to save your settings.

Related Information

Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]

Email Survey Integrations for Change in Employee Department [page 95]
Email Survey Integrations for Change in Employee Division [page 96]
Email Survey Integrations for Learning [page 112]
Integration Service Registration Center (Admin Center guide)

24 Using Multiple SAP SuccessFactors Environments with Qualtrics

Consider the following if you have multiple environments in SAP SuccessFactors that you want to use with your Qualtrics account, as well as the impact that performing an instance refresh has.

Context

With a standard Qualtrics license, your organization is assigned a single Qualtrics tenant. Qualtrics tests and certifies this tenant, then purges all the tenant's test data before promoting it to a productive tenant that can then be integrated with your SAP SuccessFactors Production tenant.

Without a separate test environment in Qualtrics to run tests against, you could encounter some issues. For example, you could introduce duplicate employee data into the Qualtrics employee directory for your account (which could happen by importing user data from test environments).

In addition, there’s no tool in Qualtrics that allows you to copy configurations between brands.

Such issues could impact you if you refresh an instance within the SAP SuccessFactors HCM suite, because the Instance Refresh tool copies the following information from the source to target instance **automatically**:

- The Qualtrics URL.
- If the Upgrade Center is enabled in the target instance, the *Upgrade to Enable Qualtrics Employee Experience* feature in the Upgrade Center in your source instance.
- Configuration data (MDF) for all (in-app and email) survey integrations.
- All integrations defined in the Integration Center are copied from the source to the target instance.
- All survey integrations (both in-app and email) in the Manage Qualtrics Integrations page are copied from the source to the target instance regardless of whether they're active or not in the source instance. To prevent active survey integrations from appearing in SAP SuccessFactors module pages or sending email surveys, disable their integrations in Manage Qualtrics Integrations.

Even after an instance refresh, however, the target instance retains the following settings:

- Destination Settings and Source Settings configurations in the Integration Center aren’t copied to the target instance after a refresh.
- Security Center is restored with the same configuration that was available before a refresh in the target instance.

> ⓘ Note
>
> Existing scheduled jobs related to the Integration Center (such as the regularly scheduled transfer of employee data to the Qualtrics employee directory) are deleted.

The following are suggestions if you want to run some tests using a nonproduction environment:

Procedure

- For an additional cost, obtain a sandbox tenant from Qualtrics. A sandbox tenant lets you run tests in a separate tenant without impacting your main Qualtrics space.
- Create the following test environment:
    - To test from your SAP SuccessFactors Preview environment, create test projects in your Qualtrics account in which to create your Qualtrics surveys.
    - Avoid syncing your entire set of user data from your SAP SuccessFactors Preview environment to Qualtrics. This way, you have less data that needs to be cleaned up (performing a bulk deletion) after you're done testing. Alternatively, consider assigning a prefix or suffix of "`test`" to all test user IDs.

Related Information

Things to Know Before Refreshing the Target Instance
Using the Instance Refresh Tool

25 Using Roles in Qualtrics Intercepts

Some modules allow you to use roles with your Qualtrics intercepts so that you can specify who an in-app survey displays for.

Prerequisites

- You have a *Website / App Feedback* project in your Qualtrics account, and created the survey and popup creative.
- You've read *Embedded Data* at Qualtrics.com and understand how to use embedded data in your survey.

Context

The role setting gives you more control over who you target as the recipient of the survey. For example, an employee could only see the survey as a manager, but not as an individual.

You can specify routing roles for your Qualtrics intercepts in the following SAP SuccessFactors modules:

- Compensation
- Performance and Goals

Configure settings in your Qualtrics account for your intercepts to recognize routing roles.

Procedure

1. Create your routing roles for your module using the following roles that Qualtrics recognizes:
    - `E` – employee
    - `EA` – employee's second manager
    - `EH` – employee's HR manager
    - `EHM` – manager of employee's HR manager
    - `EM` – employee's manager
    - `EP` – all employee's matrix managers
    - `EX` – employee's first matrix manager
    - `O` – originator
    - `OM` – originator's manager
    - `U` – specific user

    Some role identifiers are repeatable. For example, EMM (employee's second-level manager), EMMM (employee's third-level manager), and so on.

2. Log in to your Qualtrics.com account and specify the following *Embedded data* values for your Website / App Feedback project:
    - *HTML on Site* as the field
    - **`sfQualtrics_surveyRoleID`** as the value
3. Create the embedded data element in your survey's survey flow.

    For example, you can create a branch that shows your survey's manager-specific questions only if you set `sfQualtrics_surveyRoleID` to `EM` (the employee's manager).

Results

You've now instructed your Qualtrics intercept to recognize routing roles in your SAP SuccessFactors modules.

> Note
>
> You don't need to change your SAP SuccessFactors integration settings in Manage Qualtrics Integrations to specify or configure any routing roles.

Related Information

Embedded Data (Qualtrics.com)
In-App Survey Integrations for Compensation Form Completion [page 81]
In-App Survey Integrations for Performance Reviews [page 87]
Roles (Implementing and Managing Performance Management)
Creating Route Maps (Implementing and Managing Compensation)

26 Settings for Email Survey Integrations

Configure your system to email survey opportunities when specific events are triggered in the Intelligent Services Center, and manage them in the Manage Qualtrics Integrations page in the Admin Center.

Manage Qualtrics Integrations in the Admin Center includes an *Email Surveys* tab. This option allows you to create integrations between Intelligent Services events for SAP SuccessFactors features and Qualtrics, so that your employees receive email surveys for specific events.

The *Email Surveys* tab in *Manage Qualtrics Integrations* requires additional configurations after you complete your SAP SuccessFactors-Qualtrics integration:

- A Qualtrics Employee Experience license for your organization, which allows you to create Lifecycle projects. A more robust set of capabilities specific to recruiting-related campaigns is available from Qualtrics through its separately licensed Candidate Experience program.
- A Qualtrics survey that you want to email, designed specifically for the SAP SuccessFactors module and feature you're interested in.
- Intelligent Services, enabled for your SAP SuccessFactors system.
- The configurations necessary for the SAP SuccessFactors–Qualtrics integration, including the configuration of the **SAP Qualtrics Integration Definition – User Export to SFTP** business scenario in the Integration Center.
- An outbound OAuth configuration. This configuration is a required field in the email survey integration form, and you can use the same configuration for all of your email survey integrations.
- For Employee Central email survey integrations, a business rule to associate in the email survey integration form.

> Note
>
> If you see an error similar to the following when your email integration triggers an Intelligent Services event for the first time, it can mean that the SAP SuccessFactors API hasn't been turned on for your Qualtrics account:
>
> ```
> Http Error response code 403 with response state text:
> Forbidden ; Click text to download payload for further details
>
> {"meta":{"requestId":"af619e8d-bd8a-404f-aefc-ef93210d9881",
>   "httpStatus":"403 - Forbidden","error":{"errorCode":"PPE_4",
>   "errorMessage":"User does not have access to this resource."}}}
> ```
>
> If this happens, contact Technical Support to request the enablement of the configuration on Qualtrics, or create a Qualtrics request for component XM-EX-EE.

Related Information

The Manage Qualtrics Integrations Feature in the Admin Center [page 64]
Getting Started with Employee Lifecycle (Qualtrics.com)
Setting Up Message Automation (Qualtrics.com)
Implementing and Managing Intelligent Services
Using the Integration Center

SAP Note 3034405

27 Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations

Set up an outbound OAuth configuration to authorize SAP SuccessFactors to send data to Qualtrics so that you can create email survey integrations in *Manage Qualtrics Integrations*.

Prerequisites

- The following role-based permission is enabled: *Manage Security Center* > *Access to OAuth Configurations (View)*.
- You've created a new OAuth client in the OAuth Client Manager in your Qualtrics account, and have all your client credential information.

Context

You only need to create one outbound OAuth configuration to send email surveys.

Procedure

1. From the SAP SuccessFactors Admin Center, go to *Security Center* and select *Outbound OAuth Configurations*.
2. From the bottom left of the page, select *Add*.

   The OAuth 2.0 Settings page appears.
3. Fill out the following fields in the OAuth 2.0 Settings page (obtaining some of the information from your Qualtrics account settings):

Option	Description
Description	Add a description.
Configuration Name	(Required) Provide a unique name, such as `QualtricsOAuth`.
OAuth Type	Choose *OAuth 2.0*.
Grant Type	Choose *Client_Credentials*.
Client ID	(Required) Enter the client ID, which is a long string from your Qualtrics account settings.

Option	Description
Client Secret	(Required) Enter the client secret, which you get from your Qualtrics account settings. The data is masked when you enter it in this field.
Token URL	(Required) Provide the token URL from your Qualtrics account settings, which uses this pattern: https://<datacenter>.qualtrics.com/oauth2/token. If you specified scopes when you created the OAuth client in your Qualtrics account, include this scope information as a query string in the token URL: • When you specify one scope, use https://<datacenter>.qualtrics.com/oauth2/token**?scope=manage:all**. ⚠ Caution Using scope=<any single scope> for one scope generates an error. • When you specify multiple scopes, use https://<datacenter>.qualtrics.com/oauth2/token?**scope=manage:all&scope=manage:activity_logs**. ⚠ Caution The order matters in the query string. Specify all first, then activity_logs second. Specifying scope=manage:activity_logs first in the query string generates an error.
Token Method	Choose *POST*.

For more information about OAuth authentication and Qualtrics, see *Security and OAuth* at Qualtrics.com.

4. Select *Save*.

Related Information

Security and OAuth (Qualtrics.com)

28 Creating a Business Rule for Email Surveys

Create a business rule that you can associate with email surveys.

Prerequisites

You have role-based permission access to *Configure Business Rules*.

Context

When you create a new Qualtrics integration for an email survey in *Manage Qualtrics Integrations*, one of the fields you need to specify is *Rule Configuration*. This means that you need to have the rule **before** you create your email survey integration.

Although you can create multiple rules that each apply to different events, what matters is that you have a rule to associate to an event. If you want, you can create one rule that applies to all your events.

Procedure

1. From the Admin Center, go to *Configure Business Rules* and select the + *add* button.
2. Expand *Intelligent Services Center (ISC)* and select *Intelligent Services Center Rule for Job Information*.
3. Enter the following in the *Intelligent Services Center Rule for Job Information* form that appears on the top right of the page:

Option	Description
Rule Name	Enter a name for the rule. You can have it refer to the rule setting, or the event you plan to use this rule for. **Note** If you're creating a business rule for an email survey for Change in Employee Department in Employee Central, use `SF_QUALTRICS_INT_EMP_DEPT_CHANGE`.
Rule ID	Enter a unique ID for the rule.
Start Date	Choose a start date for this rule.
Description	(Optional) Enter a description in this field.

4. Select *Continue*.

   The rule's detail page appears.

5. Create your condition in the *If* field.

> **Example**
>
> - This example creates a rule that restricts the event to a specific country/region:
>   `Job Information Company Country` *is equal to Value* `United States (USA)`.
> - This example creates a rule that restricts the event to a specific business unit:
>   `Job Information Business Unit` *is equal to Value* `Products (PRODS)`.

6. Select *Save* to save your rule.

Results

You've now created a rule you can use when creating an email survey integration in *Manage Qualtrics Integrations*.

Related Information

Restoring a Business Rule in Email Survey Integrations [page 76]
Implementing Business Rules in SAP SuccessFactors

29 Changing the Timing for an Email Survey Event

Change the default timing of an Intelligent Services event when you want to control when your employees receive their email surveys.

Prerequisites

You already set up an email survey integration.

Context

By default, an integration you set up through Intelligent Services is triggered as soon as the event is published, with your employees receiving their email surveys soon afterwards. This timing is fine in most cases. For some situations, however, such as when you want to send a survey to an employee who tendered a resignation (where you don't want the email to go out right away, but closer to the last day of employment), you want to be able to change the timing of when Qualtrics is notified of the event.

Procedure

1. In the Admin Center, go to *Intelligent Services Center* and open the event associated with your email survey.

   The event name is similar to the value you specify in the *Event Area* field in your email survey integration. For example, the Intelligent Services event for *End Global Assignment* is *Employee Central: End Global Assignment*.
2. Select *Predefined_Default_Flow* in the left column.
3. On the row listing the Qualtrics integration name in the main screen, choose the ⌄ (dropdown) arrow in the *TIMING* column.

   Timing fields appear.
4. Change the value to the timing you want for Intelligent Services to send a notification about the event, such as 10 days before effective date.
5. Select *Actions* > *Save flow* flow to save the settings for the integration.

30 The Manage Qualtrics Integrations Feature in the Admin Center

The Manage Qualtrics Integrations page allows you to create, edit, delete, and archive your Qualtrics integrations with various SAP SuccessFactors modules.

You can access the Manage Qualtrics Integrations page in the SAP SuccessFactors Admin Center after you've completed your SAP SuccessFactors-Qualtrics integration, and have the appropriate role-based permissions. The page is the primary way you maintain and organize your relationships between SAP SuccessFactors and Qualtrics projects.

The pages you can add integrations to are based on what SAP SuccessFactors modules you use, and you can have one active Qualtrics integration per SAP SuccessFactors page or template. You can have multiple integrations for multiple pages or templates, but not multiple integrations for a single page or template.

The Manage Qualtrics Integrations page supports two types of integrations:

- In-app surveys – integrations that allow you to insert a creative within a module in SAP SuccessFactors, so that participants can choose to select the link to take the survey.
- Email surveys – integrations that use the occurrence of specific events in the Intelligent Services Center to trigger the distribution of surveys to participants through email.

> ⓘ Note
>
> A Qualtrics survey integration is different from the SAP SuccessFactors-Qualtrics business scenario integration you set up in the Integration Center. The business scenario created a bridge between your SAP SuccessFactors and Qualtrics accounts to maintain synchronized employee data. A survey integration connects a survey you create in Qualtrics, with a page in SAP SuccessFactors where you want the creative to appear.

Related Information

Qualtrics In-App Surveys [page 78]
Qualtrics Email Surveys [page 92]
Configuring the Qualtrics Business Scenario in the Integration Center [page 26]

31 Finding ID Information for Surveys in Qualtrics

Creating a survey integration requires identifying information from your Qualtrics project.

Prerequisites

You have a Qualtrics Employee Experience project that includes an intercept, creative, and survey — and you have access to it with your Qualtrics admin account, for the following:

- **In-app surveys** – a Qualtrics Website and app feedback project
- **Email surveys** – a Qualtrics Lifecycle project

Procedure

1. Log in to your Qualtrics account.
2. For **in-app surveys**, go to the project's *Intercepts* tab and select *...* > *Copy intercept IDs* to obtain the following IDs from your *Website / App Feedback* project:
   - *Brand ID* – used when creating both web and mobile integrations.
   - *Project ID* – used when creating both web and mobile integrations.
   - *Intercept ID* – used when creating mobile integrations.
3. For **email surveys**, obtain the Project ID from your *Lifecycle* project:
   a. Select your profile icon from the top right of the page, and choose *Account Settings* from the dropdown list.

      The *User Settings* page appears.
   b. Select the *Qualtrics IDs* tab to see a list of your Qualtrics IDs.
   c. Find the survey for your Lifecycle project in the *Surveys* table, and select the corresponding unique ID code in the right column.
   d. Save this ID. This is your email survey's Project ID.

Results

You now have the Qualtrics ID information you need to complete the *Add New Integration* form in *Manage Qualtrics Integrations*.

Related Information

Finding Qualtrics IDs (Qualtrics.com)

32 Creating a New Qualtrics Integration

Use the Manage Qualtrics Integrations page to create an integration between your existing Qualtrics project and an SAP SuccessFactors event, or page, template, or step within a page.

Prerequisites

- You have the appropriate role-based permission to access Manage Qualtrics Integrations. Refer to Assigning Role-Based Permissions to Use Qualtrics with SAP SuccessFactors [page 37].
- Qualtrics is enabled and integrated with your SAP SuccessFactors system, and you have a Qualtrics project that includes a survey. For in-app survey integrations, you also have a Qualtrics intercept and creative.
- You've obtained from your Qualtrics project or survey the relevant identifying information needed in the Add New Integration dialog. Refer to Finding ID Information for Surveys in Qualtrics [page 65].
- For email survey integrations, you have an OAuth configuration. Refer to Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59].
- For Employee Central email survey integrations, you have a business rule specific to the survey. Refer to Creating a Business Rule for Email Surveys [page 61].
- For in-app survey integrations for Performance, you have the necessary templates, including route maps that are already configured.

Context

You can only have one active integration per page, template, page step, or program. You see an error message if you try to create an integration for a page (or template) that already has an active integration. To resolve this issue, archive or delete the active integration to allow the creation of a new one.

Procedure

1. Go to *Admin Center* > *Manage Qualtrics Integrations*, and select the appropriate tab based on the type of integration you're creating:

Option	Description
IN-APP SURVEYS	Integrations that allow you to insert a creative within a module in SAP SuccessFactors, so that participants can choose to select the link to take the survey.
EMAIL SURVEYS	Integrations that use the occurrence of specific events in the Intelligent Services Center to trigger the distribution of surveys to participants through email.

2. Select + *Create New Integration*.

The *Add New Integration* dialog appears.

3. In the *Add New Integration* dialog, enter an *Integration Name*.

   The name must be unique, and up to 128 characters long. You can use letters (uppercase and lowercase), numbers, and spaces. You can edit this name later on.
4. From the *Product Area* field's dropdown list, choose the area in which you want to add the Qualtrics integration.
5. **IN-APP SURVEYS**: Complete the remaining fields, then select *Add*.

> **Note**
>
> The *Add New Integration* dialog displays different fields based on the product area and page you choose. Refer to the topics in *Qualtrics In-App Surveys* for specific survey settings. Complete only the fields that display.

Option	Description
Page	Choose the page within the product area for the integration. The selections in the dropdown list change based on which product area you choose. You can only have one active integration per page. If you want to use the same page for a different project, disable the first integration.
Template	This field appears if your product area's page uses templates. You can only have one active integration per template. If you want to use the same template for a different project, disable the first integration.
Step	This field appears if your product area's page has individual steps. You can only have one active integration per step. If you want to use the same step for a different project, disable the first integration.
Program Name	This field appears if your product area's page has programs you can specify. You can only have one active integration per program. If you want to use the same program for a different project, disable the first integration.
Integration for Web	This checkbox is selected by default, and designates a desktop browser for the intercept. You can unselect it if your product area supports — and you're **only** interested in — creating an integration for mobile.
Brand ID	The Brand ID is located in *Website / App Feedback* > *Intercepts* for your project in your Qualtrics account. From there, go to *...* > *Copy intercept IDs* to select and copy the Brand ID field.
Project ID	The Project ID is located in *Website / App Feedback* > *Intercepts* for your project in your Qualtrics account. From there, go to *...* > *Copy intercept IDs* to select and copy the Project ID field.
Frequency (in days)	A numeric value that represents how often the survey appears. Valid values are 1 through 356.
Integration for Mobile	This optional field, which appears only when you select a module that supports it, specifies that you want to display the intercept on a mobile device. You can enable both this option as well as *Integration for Web* for the same integration instead of creating two separate integrations.

Option	Description
	You can enable this option without enabling *Integration for Web* if you plan on deploying your integration **only** on a mobile device. ⓘ Note To use this option, configure your Qualtrics intercept for mobile devices.
Brand ID (Mobile)	The Brand ID for mobile, which is typically the same as for web integrations, is located in *Website / App Feedback* > *Intercepts* for your project in your Qualtrics account. From there, go to *...* > *Copy intercept IDs* to select and copy the Brand ID field.
Project ID (Mobile)	The Project ID for mobile, which is typically the same as for web integrations, is located *Website / App Feedback* > *Intercepts* for your project in your Qualtrics account. From there, go to *...* > *Copy intercept IDs* to select and copy the Project ID field.
Intercept ID (Mobile)	The Intercept ID is required for mobile integrations, and is located in *Website / App Feedback* > *Intercepts* for your project in your Qualtrics account. From there, go to *...* > *Copy intercept IDs* to select and copy the Intercept ID field.

6. *EMAIL SURVEYS*: If you're creating an email survey, complete the rest of these fields in the *Add New Integration* dialog, then select *Add*.

> ⓘ Note
>
> The *Add New Integration* dialog displays different fields based on the product area and page you choose. Refer to the topics in *Qualtrics In-App Surveys* for specific survey settings. Complete only the fields that display.

Option	Description
Event Name	Select the Intelligent Services event for this integration.
Survey Recipient	This field shows the recipient of the survey.
Business Scenario Name	This field shows the name of the business scenario for this integration.
OAuth Configuration	Select the appropriate configuration for this configuration. If this field is blank, create an OAuth configuration in the Security Center for connecting to Qualtrics.
Rule Configuration	This field only appears if your event requires a business rule. Select the rule associated with this event. If the field is blank or there's no rule associated with this event, create one in *Configure Business Rules*.
Project ID	The Project ID is the unique code associated with your project in the Qualtrics IDs page in your Qualtrics account. ⓘ Note The value in this field isn't the same as the Project ID you specify for your in-app survey integrations.

You see a message similar to `You've successfully created a new integration`.

Results

You're back in the Manage Qualtrics Integrations page, and your newly created integration now appears on the list of integrations in the respective survey type. For in-app surveys, the Qualtrics creative now appears on the page (or template) you specified in your integration, and is visible to persons who visit the page.

Next Steps

You can edit, delete, or disable your integration at any time. You can also go to your Qualtrics account to view reports from feedback results.

Some email surveys also require you to change the timing of when your employees get their email surveys.

Related Information

Finding ID Information for Surveys in Qualtrics [page 65]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
Creating a Business Rule for Email Surveys [page 61]
Changing the Timing for an Email Survey Event [page 63]

33 Editing a Qualtrics Integration

Use the Manage Qualtrics Integrations page to edit an active integration to change its name, and the Qualtrics identifying fields associated with the integration.

Context

You can edit, delete, or archive an active integration at any time.

The purpose of editing an integration is to allow you to change the name of the integration, or the intercept information for the integration; it's not meant for you to reuse an integration. For example, you might decide to rename an integration before you archive it, by adding the year that you used it.

When you edit an existing integration, the product area, page, and template fields are read-only on the Edit Integration dialog. If you want to change these read-only fields, create a new integration instead.

Procedure

1. Go to *Admin Center* > *Manage Qualtrics Integrations*.
2. Choose the *IN-APP SURVEYS* or *EMAIL SURVEYS* tab depending on the type of integration you want to edit.
3. Find the integration you want to edit, and click anywhere on the line that it's on.

   The Edit Integration dialog appears.
4. Change any or all of these fields, then select *Save*:

Option	Description

For in-app surveys	• *Integration Name*
	• *Program Name*
	• *Template*
	• *Step*
	• *Integration for Web*
	    • *Brand ID*
	    • *Project ID*
	• *Integration for Mobile*
	    • *Brand ID (Mobile)*
	    • *Project ID (Mobile)*
	    • *Intercept ID (Mobile)*

For email surveys	• *Integration Name* • *OAuth Configuration* • *Rule Configuration* • *Project ID*

A number of fields in the Edit Integration dialog are read-only. In in-app surveys, those fields are *Product Area*, *Page*, *Template*, and *Step* fields. The *Template* and *Step* fields only appears if your module and page use templates or page steps, respectively. In email surveys, they are *Product Area*, *Event Name*, *Survey Recipient*, and *Business Scenario Name*.

You see a message similar to `You've successfully edited an integration.`

Results

You're back in the Manage Qualtrics Integrations page. If you changed the intercept, the page where you specified your integration now shows your new creative.

34 Deactivating a Qualtrics Integration

Use the Manage Qualtrics Integrations page to deactivate an active integration when it's ready to be retired, and you don't need to display its creative on your product area's page anymore.

Context

You can edit, delete, or deactivate an active integration at any time.

When you deactivate an integration, the creative that the intercept calls no longer appears on your product area's designated page, template, or page step. The intercept converts to read-only and you can't change the property of any of the fields. Your only options for a deactivated integration are to leave it in its inactive state, delete it altogether, or reactive it through a restoration. Keeping it deactivated means that you still see it in your list of integrations (and thus have a record of it), and you can see what its configurations are.

Procedure

1. Go to *Admin Center* > *Manage Qualtrics Integrations*.
2. Find the integration you want to deactivate, and click anywhere on the line that it's on.

   The Edit Integration dialog appears.
3. In the bottom-right corner of the dialog, select *Disable*.

   You see a message asking you to confirm that you want to deactivate the integration.
4. Select *OK* to confirm, or *Cancel*.

   The integration is deactivated if you proceeded with the confirmation.

Results

The deactivated integration appears on your list of integrations in the Manage Qualtrics Integrations page, with its status now displaying as *Inactive*. When you select it from the list, the read-only View Archived Integration page appears.

35 Deleting a Qualtrics Integration

Use the Manage Qualtrics Integrations page to delete an active or archived integration.

Context

You can edit, delete, or archive an active integration at any time.

> ⚠ Caution
>
> Make sure that you want to delete the integration. You can't reverse the process to restore the integration, you can't retrieve an integration once you delete it, and there are no logs to see if the integration existed.

> ⓘ Note
>
> Deleting an integration isn't the same as deleting the intercept itself. This delete process removes the connection between your product area's page (or template) and your Qualtrics intercept so that the creative no longer appears on the SAP SuccessFactors page. This process doesn't delete the survey or its results from your Qualtrics account.

Procedure

1. Go to *Admin Center* > *Manage Qualtrics Integrations*.
2. Find the integration you want to delete, and click anywhere on the line that it's on.

   The Edit Integration dialog appears. If you selected an archived integration, you see a read-only page called View Archived Integration.
3. In the bottom-left corner of the dialog, select *Delete*.

   You see a message asking you to confirm that you want to delete the integration.
4. Select *Confirm*.

   The integration is deleted, and no longer appears in your list of Qualtrics integrations on the Manage Qualtrics Integrations page.

36 Restoring an Inactive Qualtrics Integration

Use the Manage Qualtrics Integrations page to restore an inactive integration when you want to display its creative on your product area's page.

Procedure

1. Go to *Admin Center* > *Manage Qualtrics Integrations* .
2. Find the inactive integration you want to restore, and select the line that it's on.

   The Edit Integration dialog appears.
3. In the bottom-right corner of the dialog, select *Restore*.

   You see a message asking you to confirm that you want to reactivate the integration.

   Instead of a confirmation, you could see a message similar to the following:

   ```
   You can't restore this integration because it lost its association
   with a required field. To reuse this integration, specify the
   same settings in a new integration instead.
   ```

   The message means that a value for a required field lost its association to the integration or was deleted.

   Your options are to delete it or keep it in its inactive state. Instead of restoring the integration, create a new one altogether using the same settings you used to set up your initial integration.
4. Select *OK* to confirm, or *Cancel*.

   The integration is restored if you proceeded with the confirmation.

   If there's already an integration for the same category (such as the same event for email surveys), you see a message similar to `You can't reuse the integration because an event only supports one active integration at a time`, and the restoration doesn't happen.

   If you still want to restore this integration, you have to disable or delete the active integration first.

37 Restoring a Business Rule in Email Survey Integrations

Restore a business rule when it loses its association with an email survey integration.

Context

There are two situations in which your email survey integration stops working because of a problem with a business rule. When you encounter this issue, you see a message similar to the following in *Manage Qualtrics Integrations* for the affected email survey integration:

```
Missing rule. If the Rule Configuration field shows a rule, refresh
the integration by saving it again to reconnect the rule to the integration.
If there's no rule, create a new one in Configure Business Rules, then
return here to specify the new rule in the Rule Configuration field.
```

> ⓘ Note
>
> An Employee Central email survey integration stops working if it loses its association with a rule:
>
> - If the rule is removed from the flow in the associated business scenario.
> - If the rule is deleted from the system.

Procedure

1. Select the affected email survey integration in *Manage Qualtrics Integrations*.

   The *Edit Integration* dialog appears.
2. View the *Rule Configuration* field.

   What you do next depends on whether you see a rule listed in the *Rule Configuration* field.
3. If you see a rule in the field, make a minor change to your integration that the system interprets as an edit action (such as adding, then deleting a space in the integration name), then select *Update*.

   The error message appeared because the rule still exists, but it lost its connection to your email survey integration. Updating your integration simply refreshes its settings, including re-establishing the connection to the rule.
4. If the *Rule Configuration* field is blank, you need to create a business rule again.

   This condition occurs when the rule is deleted from the system altogether.

   a. Go to *Configure Business Rules* and create a business rule for the Employee Central event.
   b. Return to *Manage Qualtrics Integrations* and select the integration.
   c. In the *Edit Integration* dialog, select the newly created rule in the *Rule Configuration* pulldown list.

d. Select *Update* to save the integration.

Results

You no longer see an error message for the integration in *Manage Qualtrics Integrations*, and your email survey integration now works.

Related Information

Implementing Business Rules in SAP SuccessFactors
Creating a Business Rule for Email Surveys [page 61]

38 Qualtrics In-App Surveys

You can configure Qualtrics feedback capabilities to collect responses through a survey accessible from within SAP SuccessFactors modules, and manage the integrations in *Manage Qualtrics Integrations* in the SAP SuccessFactors Admin Center.

Before you can create in-app survey integrations in the Manage Qualtrics Integrations page, you need the following:

- You have a Qualtrics Employee Experience license, or optionally, a Candidate Experience license for recruiting-related campaigns.
- You have a Qualtrics **Website and app feedback project** survey that you want your employees to participate in, designed specifically for the SAP SuccessFactors module and feature you're interested in.
- You've completed the SAP SuccessFactors-Qualtrics integration, which includes configuring the **SAP Qualtrics Integration Definition - User Export to SFTP** business scenario.

Once your system is configured, you can use *Manage Qualtrics Integrations* to create in-app survey integrations.

Related Information

The Manage Qualtrics Integrations Feature in the Admin Center [page 64]
Creating a New Qualtrics Integration [page 67]

38.1 In-App Survey Integrations for Continuous Performance Management

Manage Qualtrics Integrations settings to create an integration between your Qualtrics survey and SAP SuccessFactors Continuous Performance Management to get periodic feedback after employees have captured meeting notes for their 1:1.

- The *Frequency (in days)* field in the survey integration lets you specify how often a creative appears for employees, from 1 to 365 days.
- Creatives appear on an employee's *My Activities* page after that employee chooses *Save and Finish* to save the notes and close the Continuous Performance meeting.
- Only the subject of the meeting who saves the meeting can see the survey. The survey isn't visible to the other person in the meeting, or to a proxy user who logs in as the subject.
- If there's no meeting history, the survey displays immediately after the employee's first meeting regardless of frequency setting.

> ⓘ Note
>
> The survey doesn't display on the *My Activities* page if the employee chooses not to save the meeting, or if the meeting is saved by the manager instead.

> ✤ Example
>
> The following are examples of how the *Frequency (in days)* works when you set its value to 10 days. The survey displays to the employee when a meeting is captured 10 days after the previous captured meeting.
>
> **Scenario 1** – After one meeting, employee Julie doesn't capture the next meeting until 30 days later. In this scenario, the survey displays after that second meeting that was captured 30 days later. This result happens because although the survey frequency is set to 10 days, the second meeting was the first time Julie captured a meeting again.
>
> **Scenario 2** – Employee Antonio captures a meeting on July 8. Four days later on July 12, you create a new integration that's designed to start displaying a survey every 10 days. The date on which Antonio sees a survey depends on when the next meeting is captured:
>
> - If Antonio captures a meeting on or before July 18, he **doesn't** see a survey until the **following** meeting, because it's been less than 10 days before the July 8 meeting.
> - If Antonio captures a meeting on or after July 19, he **does** see a survey, because it's been 10 days (or longer) since the July 8 meeting.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Talent*
Page	*Continuous Performance Management*
Integration for Web	Enabled by default to designate a desktop browser for the intercept. You can't unselect this setting.
Brand ID	The brand ID for your Website / App Feedback project, from your Qualtrics account.
Project ID	The project ID for your Website / App Feedback project, from your Qualtrics account.
Frequency (in days)	A numeric value that represents how often the survey appears. Valid values are 1 through 356.

Related Information

Creating a New Qualtrics Integration [page 67]
Finding ID Information for Surveys in Qualtrics [page 65]
Finding ID Information for Surveys in Qualtrics [page 65]
Using Continuous Performance Management

38.2 Compensation

38.2.1 In-App Survey Integrations for Award Nominations

Manage Qualtrics Integrations settings to create an integration between your Qualtrics survey and the award nomination application to get feedback from employees about what they thought about the award submission process.

The creative appears for employees as a pop-up dialog after they successfully assign an award to a peer from the *Reward and Recognition* home page.

Configure your Qualtrics intercept settings to embed the creative directly on the Spot Award Success Dialog (instead of as a pop-up) instead. Go to the *Advanced Options* page for your intercept in Qualtrics, then configure and save the following settings:

- *Open Target in Current Window* – located in the *Display Options* section, select this option.
- *Creative Insertion Point* – located in the *Action Set Sample Rate* section. Enter `QualtricsIntercept` to provide a label for the *div ID* field.

> **Note**
>
> This integration isn't available for the SAP SuccessFactors Mobile app.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Compensation*
Page	*Awards*
Program Name	The awards you want to create the integration for. You can choose multiple selections from the dropdown list.
Integration for Web	Enabled by default to designate a desktop browser for the intercept. You can't unselect this setting.
Brand ID	The brand ID for your Website / App Feedback project, from your Qualtrics account.
Project ID	The project ID for your Website / App Feedback project, from your Qualtrics account.

Related Information

Creating a New Qualtrics Integration [page 67]
Finding ID Information for Surveys in Qualtrics [page 65]
Finding ID Information for Surveys in Qualtrics [page 65]
Implementing and Managing Reward and Recognition

38.2.2 In-App Survey Integrations for Compensation Form Completion

Manage Qualtrics Integrations settings to create an integration between your Qualtrics survey and the SAP SuccessFactors Compensation to get feedback from your managers after they complete a compensation form.

Steps

Specifying a template and named steps in a Qualtrics integration to SAP SuccessFactors for compensation forms allows you to display a feedback opportunity after specific steps in the Compensation Form Completion process.

- You can choose multiple steps for the same integration, and the values that appear in the *Step* field are based on the steps you have in your template. These can be single role, iterative, and collaboration steps.
- You can also have more than one active integration, as long as an individual step isn't used in more than one integration.
- If a step includes multiple roles, you can use the same survey for all roles in that step.

The creative appears for managers after they successfully complete a compensation form.

Roles

You can use roles to configure Qualtrics intercept for performance reviews so that you can specify who a survey displays for based on the routing roles you set up.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Compensation*
Page	*Compensation and Variable Pay*
Template	The template you're using for this integration.
Step	A dropdown list that displays all of the named steps for the selected template. You can choose multiple steps.

Fields	Values
Integration for Web	Enabled by default to designate a desktop browser for the intercept. You can't unselect this setting.
Brand ID	The brand ID for your Website / App Feedback project, from your Qualtrics account.
Project ID	The project ID for your Website / App Feedback project, from your Qualtrics account.

Related Information

Creating a New Qualtrics Integration [page 67]
Finding ID Information for Surveys in Qualtrics [page 65]
Using Roles in Qualtrics Intercepts [page 55]
Finding ID Information for Surveys in Qualtrics [page 65]
Implementing and Managing Compensation

38.3 Employee Central

38.3.1 In-App Survey Integrations for Employee Central Global Benefits for New Hires, Rehires, and Open Enrollment

Manage Qualtrics Integrations settings to create a Qualtrics integration for Global Benefits to add a feedback opportunity on a screen that appears after your employees successfully enroll in a benefit during a new hire, rehire, or open enrollment period.

The creative appears for employees after they successfully submit a benefit selection from *Benefits* > *Open Enrollment*, in the following flow:

1. After making benefit selections, employees select the (cart) icon and choose *Enroll*. The *Terms and Conditions* dialog appears.
2. Employees agree to the terms and selects *Confirm*. The confirmation dialog appears.
3. Employees select *Confirm*. The Qualtrics survey request dialog appears. Choosing *Provide Feedback* takes the employees to the survey.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Pages	*New Hire, Rehire, and Open Enrollment*
Integration for Web	Enabled by default to designate a desktop browser for the intercept. You can't unselect this setting.
Brand ID	The brand ID for your Website / App Feedback project, from your Qualtrics account.
Project ID	The project ID for your Website / App Feedback project, from your Qualtrics account.

Related Information

Creating a New Qualtrics Integration [page 67]
Finding ID Information for Surveys in Qualtrics [page 65]
Creating a New Qualtrics Integration [page 67]
Finding ID Information for Surveys in Qualtrics [page 65]
Repeated Display Prevention & Cookie Domain (Qualtrics.com)
Implementing Global Benefits

38.3.2 In-App Survey Integrations for Employee Central Service Center

Manage Qualtrics Integrations settings to create a Qualtrics integration for Employee Central Service Center to add a feedback opportunity on a screen that appears after the service tickets your employees file are successfully resolved or closed.

The creative appears for employees after they successfully close a Service Center ticket.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central Service Center*
Pages	*Close HR Ticket*

Fields	Values
Integration for Web	Enabled by default to designate a desktop browser for the intercept. You can't unselect this setting.
Brand ID	The brand ID for your Website / App Feedback project, from your Qualtrics account.
Project ID	The project ID for your Website / App Feedback project, from your Qualtrics account.

Related Information

Creating a New Qualtrics Integration [page 67]
Finding ID Information for Surveys in Qualtrics [page 65]
Enabling In-App Qualtrics Survey on SAP Business Technology Platform [page 84]
Finding ID Information for Surveys in Qualtrics [page 65]
Implementing Service Center in Employee Central
List of Data Center URLs for BizX OData Destination Configuration

38.3.2.1 Enabling In-App Qualtrics Survey on SAP Business Technology Platform

Configure the settings on the Destination Configuration page to enable the in-app Qualtrics survey feedback for employees.

Prerequisites

You have your Qualtrics Employee Experience (EmployeeXM) license.

> ⓘ Note
>
> Let your Qualtrics representative know that you're an SAP SuccessFactors customer, and that you plan to use Qualtrics with your SAP SuccessFactors system.

Context

Create connectivity to your SAP SuccessFactors instance. Creating destination ‘Bizx_Odata’ on extension account level. Before you start, you have to register your application as OAUTH2 client application in your SAP SuccessFactors instance. To register:

- Log on to your SAP SuccessFactors instance as admin user.
- Go to *Admin Tools* > *Manage OAUTH2 Client* application.
- Create an entry for your application.

> **Restriction**
>
> We don't support IP addresses in URLs as part of our reference architecture. Use domain names instead. If you think you have a special case that requires IP addresses instead of domain names, contact Technical Support.

Procedure

1. **Create connectivity** to your SAP SuccessFactors instance by first logging on to your Global platform account to enter the SAP Business Technology Platform Cockpit.
2. Select your Extension platform account.
3. In the navigation panel, select *Connectivity* > *Destinations* .
4. Enter data as shown:

Option	Description
Name	`sf_bizx_api`
URL	`https://app-server-domain`
Client key	Choose the API key of your Manage OAUTH2 client application.
Token Service URL	`https://app-server-domain:443/oauth/token`
Additional Properties	Enter the same API key as under *Client key*. For example, `assertionIssuer`.
Company ID	Enter your SAP SuccessFactors company ID. For example, `exa1234`.

> **Note**
>
> Refer to *List of Data Center URLs for BizX OData Destination Configuration* for more details.

5. Save your entries.

   You can now enable Qualtrics survey feedback for the employees by configuring the settings on the Destination Configuration page.
6. On the Destination Configuration page, create a new *enableQualtricsSurvey* identifier for first-time users by selecting *New Property*.

   Two empty fields appear under *Additional Properties*.
7. Enter *enableQualtricsSurvey* as the name of the identifier in the first field.
8. Set the *enableQualtricsSurvey* value to either *Yes* or *No*:

Option	Description
If you want to make the Qualtrics survey available for employees on the Ask HR interface	Set the value to `yes`.

Option	Description
If you want to make the Qualtrics survey invisible for employees on the Ask HR interface.	Set the value to **no** (default setting). Alternatively, you can delete the *enableQualtricsSurvey* property.

> Note
>
> If you enter any other text in the field, the value is ignored.

9. Choose *Save*.

Related Information

List of Data Center URLs for BizX OData Destination Configuration

38.4 In-App Survey Integrations for End Mentoring

Manage Qualtrics Integrations settings to create an integration that displays a Qualtrics feedback opportunity for mentoring program participants who choose to manually close their relationship with their mentor or mentee before the program is completed.

Since this integration is designed to gather feedback from mentors and mentees who choose to close their mentoring relationshps early, you can design questions that focus on the relationship and how the matching process worked, instead of just the program as a whole.

When you create this in-app survey integration, you should also create the email survey integration designed for the other person, as described in *Email Survey Integrations for Mentoring Ended*. That email survey is designed to complement this in-app survey by allowing you to get feedback from employees whose mentor or mentee ended the relationship. Creating both integrations allows you to get feedback from both the employee who's ending the relationship, as well as the employee for whom the relationship was ended.

> Example
>
> This example describes what happens when you create both in-app and email survey integrations.
>
> Kathy Liu is Marco Rossi's mentor in the mentoring program. For various reasons, Marco (the mentee) feels that Kathy (Marco's mentor) is a mismatch, and decides to end the relationship while the mentoring program is still running.
>
> - **In-app** (this integration): As soon as Marco (the mentee) chooses *End Mentoring* in the mentoring program, a Qualtrics pop-up feedback opportunity appears right away on the screen.
> - **Email**: After Marco (the mentee) ends the relationship, the status in Kathy's mentor card on the Mentoring overview page displays the label *Mentoring Ended*. Kathy (the mentor) then receives an email with a link to a Qualtrics feedback opportunity.

There’s no in-app survey integration for the completion of a mentoring program. To obtain feedback at program completion, you create an email survey integration for all program participants, as described in *Email Survey Settings for Mentoring Program Completion*.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Talent*
Pages	*End Mentoring*
Integration for Web	Enabled by default to designate a desktop browser for the intercept. You can't unselect this setting.
Brand ID	The brand ID for your Website / App Feedback project, from your Qualtrics account.
Project ID	The project ID for your Website / App Feedback project, from your Qualtrics account.

Related Information

Creating a New Qualtrics Integration [page 67]
Finding ID Information for Surveys in Qualtrics [page 65]
Finding ID Information for Surveys in Qualtrics [page 65]
Email Survey Integrations for Mentoring Ended [page 114]
Email Survey Integrations for Mentoring Program Completion [page 115]
Using Mentoring

38.5 In-App Survey Integrations for Performance Reviews

Manage Qualtrics Integrations settings that create a Qualtrics integration to display a feedback opportunity for specific route steps the a performance review template.

Steps

Specifying named steps in a Qualtrics integration to SAP SuccessFactors for performance reviews allows you to display a feedback opportunity after specific steps in the performance review process.

- You can choose multiple steps for the same integration, and the values that appear in the *Step* field are based on the steps you have in your template. These steps can be single role, iterative, and collaboration steps.
- You can also have more than one active integration, as long as an individual step isn't used in more than one.
- If a step includes multiple roles, you can use the same survey for all roles in that step.

In a template that contains three steps (employee assessment, manager assessment, and employee signature), you can create an integration that displays a creative after both the employee and manager assessment steps. You can then create a second integration that displays a creative after the employee signature step. Since all three steps are then used in integrations (that is, a survey creative appears after all three of your steps), you can't create any additional active integrations for this template.

Roles

You can use roles to configure Qualtrics intercept for performance reviews so that you can specify who a survey displays for based on the routing roles you set up.

Survey Triggering Behavior

The timing of when a survey is triggered depends on the scenario:

- For single role and iterative steps, the survey is triggered when an evaluator sends the form to the next step.
- For a collaboration step that has an exit user, the survey is triggered when the exit user sends the form to the next step.
- For a collaboration step that has no exit user, the survey is triggered when each evaluator in a collaboration step finalizes the form.
- The survey doesn't trigger when an evaluator sends the form to another evaluator in the current iterative step. The same survey doesn't trigger repeatedly if an evaluator has already completed the survey once. For example, managers who complete a survey for one employee aren't asked to complete the same survey for the rest of their direct reports.
- The survey doesn’t trigger when sending the form to a previous step, or if it's rejected from the signature step. The same survey triggers again if employees send their performance review forms back to their managers a second time. To prevent them from seeing the survey popup dialog again, you can configure your Qualtrics settings in the intercept's *Repeated display prevention* option.
- Whether a Qualtrics integration for Performance will work after a route map step ID is modified depends on the situation:
    - If a performance review form has already been launched, changing the configuration of the route map has no effect, and the survey integration ignores the change.
    - If the form hasn’t yet launched, it has yet sync with the related Qualtrics integration. In this case, deactivate the integration and create a new one with the updated step value.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Talent*

Fields	Values
Page	*Performance Review Form Page*
Template	The template you're using for this integration.
Step	A dropdown list that displays all of the named steps for the selected template. You can choose multiple steps.
Integration for Web	The checkbox is selected by default and designates a desktop browser for the intercept. Unselect this **only** if you're creating just an integration for Mobile. You can select both checkboxes for the same integration.
Brand ID	The brand ID for your Website / App Feedback project, from your Qualtrics account.
Project ID	The project ID for your Website / App Feedback project, from your Qualtrics account.
Integration for Mobile	Qualtrics survey on Mobile is only supported for Employee Signature step A, and no other steps on Performance Forms. When you select this option, the following fields are activated for you to complete. Obtain these IDs from your Website / App Feedback project from your Qualtrics account: • *Brand ID (Mobile)* • *Project ID (Mobile)* • *Intercept ID (Mobile)*

Capturing User Information

By itself, performance review surveys are completed and sent to Qualtrics **anonymously**, without the transmission of identifying information about the participant. In order to improve the depth of analysis in your survey reports, you need set up an authenticator so that the survey-taking process automatically logs your participants in. Setting up an authenticator allows the collected responses to be connected to your participant list. For general information on this authentication process, see the *Authenticator* > *Standard Authenticator* section of the *Survey Flow (EE & EL)* page at the Qualtrics Web site.

> **Note**
>
> To use an SSO authenticator for your survey flow specifically, follow the detailed instructions in *SSO Authenticators*, also in *Survey Flow (EE & EL)*. When you do, make sure you apply these configurations:
>
> - For the *SSO Type* field, always select *Shibboleth*.
> - Place the *Branch on Successful Authentication* step at the beginning of your survey flow. This placement ensures that your employees are associated to all subsequent questions in the survey.

Related Information

Creating a New Qualtrics Integration [page 67]

Finding ID Information for Surveys in Qualtrics [page 65]
Setting Up Single Sign-On for Qualtrics [page 41]
Survey Flow (EE & EL) > Authenticator (Qualtrics.com)
Enabling Mobile Surveys for Performance Reviews [page 48]
Creating a New Qualtrics Integration [page 67]
Finding ID Information for Surveys in Qualtrics [page 65]
Using Roles in Qualtrics Intercepts [page 55]
Implementing and Managing Performance Management
SSO Authenticators (Qualtrics.com)
Repeated Display Prevention & Cookie Domain (Qualtrics.com)

38.6 In-App Survey Integrations for Recruiting Application Submissions

Manage Qualtrics Integrations settings that create an integration between your Qualtrics survey and SAP SuccessFactors Recruiting, to display a feedback opportunity in a Recruiting career site for external and internal canddiates after they successfully submit an application.

This integration requires a career site that uses Career Site Builder.

> **Note**
>
> You can improve your candidate's experience by using the purpose-build, preconfigured Candidate Experience program from Qualtrics, which provides a robust set of capabilities specific to your recruiting-related campaigns.
>
> Existing recruiting-related in-app surveys you created using Employee Experience will continue to work. If you purchase a license for the Candidate Experience program, you'd then retire your existing SAP SuccessFactors Recruiting surveys and create new ones in the Candidate Experience.

You can create these integrations both for internal as well as external applicants, so that you can ask different questions for these two groups.

If your career site is set up for Mobile Apply, non-Mobile Apply, as well as Mobile Apply using Internal Career Site, your integration automatically works in these environments, and there are no additional steps for the Qualtrics creatives to appear.

> **Note**
>
> The steps you take to create an integration for external candidates is the same as for internal candidates (employees). However, because your SAP SuccessFactors configuration doesn't send personal information about your external candidates in the employee data SFTP file, you can't perform the same level of deep analysis for external candidates as you can for internal candidates.

The creative appears in the form of a popup in a Recruiting career site when a candidate successfully submits an application.

Alternatively, configure the Qualtrics intercept settings to embed the creative directly on the thank-you page (instead of as a popup). Go to the *Advanced Options* page for your intercept in Qualtrics and configure the following settings, then save:

- *Open Target in Current Window* – located in the *Display Options* section, select this option.
- *Creative Insertion Point* – located in the *Action Set Sample Rate* section. Enter `QualtricsEmbeddedSurvey` to provide a label for the *div ID* field.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Recruiting*
Page	Choose the candidate type for the integration: • *External Application Submission* • *Internal Application Submission*
Integration for Web	Enabled by default to designate a desktop browser for the intercept. You can't unselect this setting.
Brand ID	The brand ID for your Website / App Feedback project, from your Qualtrics account.
Project ID	The project ID for your Website / App Feedback project, from your Qualtrics account.

Related Information

Creating a New Qualtrics Integration [page 67]
Finding ID Information for Surveys in Qualtrics [page 65]
Creating a New Qualtrics Integration [page 67]
Finding ID Information for Surveys in Qualtrics [page 65]
Setting Up and Maintaining SAP SuccessFactors Recruiting
Creating a New Qualtrics Integration [page 67]
Setting Up and Maintaining SAP SuccessFactors Recruiting

39 Qualtrics Email Surveys

Email survey integrations allow you to collect survey responses through email for SAP SuccessFactors modules, and manage the integrations in *Manage Qualtrics Integrations* in the SAP SuccessFactors Admin Center.

Configure business scenarios and Intelligent Services to create integrations that allow you to send email surveys to participants based on specific triggering events.

The *Email Surveys* tab in *Manage Qualtrics Integrations* requires additional configurations after you complete your SAP SuccessFactors-Qualtrics integration, such as creating a Qualtrics Lifecycle project survey and enabling Intelligent Services. There may be additional requirements depending on the SAP SuccessFactors module, such as creating an outbound OAuth configuration. Refer to *Settings for Email Survey Integrations* as well as the individual email survey integration pages here for more information.

Related Information

The Manage Qualtrics Integrations Feature in the Admin Center [page 64]
Settings for Email Survey Integrations [page 57]
Creating a New Qualtrics Integration [page 67]
Implementing and Maintaining Intelligent Services
Setting Up Message Automation (Qualtrics.com)

39.1 Email Survey Integrations for Calibration

Manage Qualtrics Integrations settings to create an integration that sends email to employees to obtain feedback through a Qualtrics survey when a calibration session is finalized.

The email survey for Calibration can help you find out how employees would rate their satisfaction with a Calibration session, which in turn helps you make appropriate corrections or adjustments.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Talent*
Event Name	*Calibration Session Finalization*
Survey Recipient	(Read-only) *Facilitators, Owners and Participants*
Business Scenario Name	(Read-only) *[Talent] Qualtrics: Calibration Session Finalization*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
Implementing and Managing Calibration
Finding ID Information for Surveys in Qualtrics [page 65]
Settings for Email Survey Integrations [page 57]

39.2 Employee Central

39.2.1 Email Survey Integrations for Add Global Assignment

Manage Qualtrics Integrations settings to create an integration that sends an email to employees to obtain feedback when they are given a global assignment.

Administrators or managers can send an employee on a global assignment to another organization. These instructions allow you to send surveys through email to such employees when they're assigned to a new global assignment, so that you can obtain feedback about how they feel about the process.

After you create your integration, change the timing of when this event is triggered by Intelligent Services.

> → Remember
>
> Employee Central email survey integrations require a business rule. Make sure you have an appropriate rule you for this email survey before you create the integration in *Manage Qualtrics Integrations*.

SAP SuccessFactors maintains two user IDs — the Home ID and Host ID — to track an employee's Global Assignment status. When you create a Global Assignment integration for an email survey, the employee export FTP file sends both Home and Host user IDs to Qualtrics, which then recognizes and correctly associates them with the employee's global assignment.

When a new Global Assignment event is raised, the Host user ID of the employee automatically sent from the Integration Center to Qualtrics to trigger the email survey.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*Add Global Assignment*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: Add Global Assignment*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
Finding ID Information for Surveys in Qualtrics [page 65]
Implementing and Managing the Employment Lifecycle (from Hiring to Termination) in Employee Central
Settings for Email Survey Integrations [page 57]

39.2.2 Email Survey Integrations for Change in Employee Department

Manage Qualtrics Integrations settings to create an integration that sends an email to employees to obtain feedback through a Qualtrics survey to find out how they feel about a change in their department.

Enabling this email survey integration requires Employee Central, a Qualtrics Employee Experience license for Lifecycle projects, and enabling Intelligent Services and Integration Service Registration Center.

You also need to create a business rule for this event. The rule appears as an option in the *Business Rule* field.

You use your Qualtrics account to create feedback opportunities and view their results. All the settings to configure the contents and schedule for the email survey are also performed at Qualtrics.

> Note
>
> If you can't see `Change in Employee Department` in the event dropdown list, contact Technical Support to request that the "EAS_QUALTRICS_PublishTopicToDEBToggle_1624294849" feature toggle be enabled.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*Change in Employee Department*
Survey Recipient	(Read-only) *Employee*
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Enabling a Qualtrics Authentication in the Integration Service Registration Center [page 51]
Finding ID Information for Surveys in Qualtrics [page 65]
Implementing and Managing the Employment Lifecycle (from Hiring to Termination) in Employee Central

Settings for Email Survey Integrations [page 57]

39.2.3 Email Survey Integrations for Change in Employee Division

Manage Qualtrics Integrations settings to create an integration that sends an email to employees to obtain feedback through a Qualtrics survey to find out how they feel about a change in their division.

Enabling this email survey integration requires Employee Central, a Qualtrics Employee Experience license for Lifecycle projects, and enabling Intelligent Services and Integration Service Registration Center.

You also need to create a business rule for this event. The rule appears as an option in the *Business Rule* field.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

> → Remember
>
> Employee Central email survey integrations require a business rule. Make sure you have an appropriate rule for this email survey before you create the integration in Manage Qualtrics Integrations.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*Change in Employee Division*
Survey Recipient	(Read-only) *Employee*
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Enabling a Qualtrics Authentication in the Integration Service Registration Center [page 51]
Finding ID Information for Surveys in Qualtrics [page 65]

Implementing and Managing the Employment Lifecycle (from Hiring to Termination) in Employee Central
Settings for Email Survey Integrations [page 57]

39.2.4 Email Survey Integrations for Change in Job Classification

Manage Qualtrics Integrations settings to create an integration that sends an email to employees to obtain feedback through a Qualtrics survey to find out how they feel about their change in job classification.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

> **Note**
>
> Make sure a business rule exists before you create this email survey integration. Refer to *Creating a Business Rule for Email Surveys* for details.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*Change in Job Classification*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: Change in Job Classification*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]

Finding ID Information for Surveys in Qualtrics [page 65]
Implementing and Managing the Employment Lifecycle (from Hiring to Termination) in Employee Central
Settings for Email Survey Integrations [page 57]

39.2.5 Email Survey Integrations for Change in Job Title

Manage Qualtrics Integrations settings to create an integration that sends an email to employees to obtain feedback through a Qualtrics survey to find out how they feel about their change in job title.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

> ⓘ Note
>
> Make sure a business rule exists before you create this email survey integration. Refer to *Creating a Business Rule for Email Surveys* for details.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*Change in Job Title*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: Email Survey After Job Title Change*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]

[Finding ID Information for Surveys in Qualtrics [page 65]](#)
Implementing and Managing the Employment Lifecycle (from Hiring to Termination) in Employee Central
Settings for Email Survey Integrations [page 57]

39.2.6 Email Survey Integrations for Change in Manager

Manage Qualtrics Integrations settings to create an integration that sends an email to new employees to obtain feedback through a Qualtrics survey to find out what they thought a change in their manager.

The email survey for Employee Central Change in Manager can help you find out more about how your employees felt about their former manager. For example, how satisfied were they with their manager's ability to assess employee performance? How satisfied were they with the feedback they got from their manager? How well did they get along with their manager? Finding out what employees think as they start their new job in your organization helps you make appropriate corrections or adjustments to the work environment.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project. The library contains sample employee exit interview, and employee satisfaction questions, both of which may be appropriate for your survey.

> **Note**
>
> Make sure a business rule exists before you create this email survey integration. Refer to *Creating a Business Rule for Email Surveys* for details.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*Change in Manager*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: Manager Change*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
Finding ID Information for Surveys in Qualtrics [page 65]
Implementing and Managing the Employment Lifecycle (from Hiring to Termination) in Employee Central
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39.2.7 Email Survey Integrations for Employee Hire

Manage Qualtrics Integrations settings to create an integration that sends an email to new employees to obtain feedback through a Qualtrics survey to find out how they're doing with their new job.

For example, you can trigger automated check-in surveys after an employee start date to ask employees how they're doing 30 days, 60 days, and 90 days into the role.

After you create your integration, change the timing of when this event is triggered by Intelligent Services.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

> Note
>
> Make sure a business rule exists before you create this email survey integration. Refer to *Creating a Business Rule for Email Surveys* for details.

Integration Settings

Specify the following values to create this integration.

Fields	Description
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*Employee Hire*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: New Hire*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.

Fields	Description
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Changing the Timing for an Email Survey Event [page 63]
Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
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39.2.8 Email Survey Integrations for Employee Rehire

Manage Qualtrics Integrations settings to create an integration that sends an email to employees who are rehired, to obtain feedback through a Qualtrics survey to find out how they feel about the rehiring process.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

> ⓘ Note
>
> Make sure a business rule exists before you create this email survey integration. Refer to *Creating a Business Rule for Email Surveys* for details.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*Employee Rehire*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: Rehire*

Fields	Values
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
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Implementing and Managing the Employment Lifecycle (from Hiring to Termination) in Employee Central
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39.2.9 Email Survey Integrations for Employee Long Term Disability

Manage Qualtrics Integrations settings to create an integration that sends an email to obtain feedback through a Qualtrics survey when an employee is absent due to a long-term disability.

For example, you can ask employees how they rate the long-term disability program.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

> Note
>
> Make sure a business rule exists before you create this email survey integration. Refer to *Creating a Business Rule for Email Surveys* for details.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.

Fields	Values
Product Area	*Employee Central*
Event Name	*Employee Long Term Disability*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: Employee Long Term Disability*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
Finding ID Information for Surveys in Qualtrics [page 65]
Implementing and Managing the Employment Lifecycle (from Hiring to Termination) in Employee Central
Settings for Email Survey Integrations [page 57]

39.2.10 Email Survey Integrations for Employee Short Term Disability

Manage Qualtrics Integrations settings to create an integration that sends an email to obtain feedback through a Qualtrics survey when an employee is absent due to a short-term disability.

For example, you can ask your employees how they feel about your organization's short-term disability program.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

> ⓘ Note
>
> Make sure a business rule exists before you create this email survey integration. Refer to *Creating a Business Rule for Email Surveys* for details.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*Employee Short Term Disability*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: Employee Short Term Disability*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

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39.2.11 Email Survey Integrations for End Global Assignment

Manage Qualtrics Integrations settings to create an integration that sends an email to employees to obtain feedback through a Qualtrics survey to find out what they thought about their experience with their global assignment.

Administrators or managers can send an employee on a global assignment to another organization. These instructions allow you to send surveys through email to such employees when they've completed their global assignments, so that you can obtain feedback about the global assignment process.

Organizations could ask questions such as "How was your global assignment experience?" or "Do you feel like you're bringing added experience back to your original job?"

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

ⓘ Note

Make sure a business rule exists before you create this email survey integration. Refer to *Creating a Business Rule for Email Surveys* for details.

SAP SuccessFactors maintains two user IDs — the Home ID and Host ID — to track an employee's Global Assignment status. When you create a Global Assignment integration for an email survey, the employee export FTP file sends both Home and Host user IDs to Qualtrics, which then recognizes and correctly associates them with the employee's global assignment.

When a new Global Assignment event is raised, the Host user ID of the employee automatically sent from the Integration Center to Qualtrics to trigger the email survey.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*End Global Assignment*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: End Global Assignment*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
Finding ID Information for Surveys in Qualtrics [page 65]
Implementing and Managing the Employment Lifecycle (from Hiring to Termination) in Employee Central
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39.2.12 Email Survey Integrations for First Time Manager

Manage Qualtrics Integrations settings to create an integration that sends an email to new employees to obtain feedback through a Qualtrics survey to find out how they're doing as a first-time manager.

For example, you can trigger automated check-in surveys after the employee status changes to a mangaer, to ask how the employee is doing 30 days, 60 days, and 90 days into the role.

After you create your integration, change the timing of when this event is triggered by Intelligent Services.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

> ⓘ Note
>
> Make sure a business rule exists before you create this email survey integration. Refer to *Creating a Business Rule for Email Surveys* for details.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*First Time Manager*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: First Time Manager*.
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
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39.2.13 Email Survey Integrations for Individual Contributor to Manager

Manage Qualtrics Integrations settings to create an integration that sends an email to managers to obtain feedback through a Qualtrics survey when individual contributors become a manager with direct reports.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

> **Note**
>
> Make sure a business rule exists before you create this email survey integration. Refer to *Creating a Business Rule for Email Surveys* for details.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*Individual Contributor to Manager*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: Individual Contributor to Manager*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
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Settings for Email Survey Integrations [page 57]

39.2.14 Email Survey Integrations for Job Transfers

Manage Qualtrics Integrations settings to create an integration that sends an email to employees to obtain feedback through a Qualtrics survey to find out how they feel about their job transfer.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

> **Note**
>
> Make sure a business rule exists before you create this email survey integration. Refer to *Creating a Business Rule for Email Surveys* for details.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*Job Transfer*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: Email Survey for Job Transfers*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

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Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
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Implementing and Managing the Employment Lifecycle (from Hiring to Termination) in Employee Central
Settings for Email Survey Integrations [page 57]

39.2.15 Email Survey Integrations for Manager to Individual Contributor

Manage Qualtrics Integrations settings to create an integration that sends an email to managers to obtain feedback through a Qualtrics survey when they become an individual contributor and no longer have direct reports.

This integration gives you the opportunity to ask your employees how they feel about the transition process from manager to individual contributor, or why they made this decision.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

> ⓘ Note
>
> Make sure a business rule exists before you create this email survey integration. Refer to *Creating a Business Rule for Email Surveys* for details.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*Manager to Individual Contributor*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: Manager to Individual contributor*.
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
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Implementing and Managing the Employment Lifecycle (from Hiring to Termination) in Employee Central

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39.2.16 Email Survey Integrations for New Concurrent Employment

Manage Qualtrics Integrations settings to create an integration that sends an email to employees to obtain feedback through a Qualtrics survey when they're assigned to concurrent employment.

The survey can help you find out more about how your employees feel about getting secondary employment in addition to their main employment.

> ⓘ Note
>
> Make sure a business rule exists before you create this email survey integration. Refer to *Creating a Business Rule for Email Surveys* for details.

SAP SuccessFactors maintains two user IDs — the Home ID and Host ID — to track an employee's Concurrent Employment status. When you create a Concurrent Employment integration for an email survey, the employee export FTP file sends both Home and Host user IDs to Qualtrics, which then recognizes and correctly associates them with the employee's concurrent employment.

When a new Concurrent Employment event is raised, the Host user ID of the employee is automatically sent from the Integration Center to Qualtrics to trigger the email survey.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*New Concurrent Employment*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: New Concurrent Employment*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.

Fields	Values
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
Managing Multiple Employment in SAP SuccessFactors
Finding ID Information for Surveys in Qualtrics [page 65]
Implementing and Managing the Employment Lifecycle (from Hiring to Termination) in Employee Central
Settings for Email Survey Integrations [page 57]

39.2.17 Email Survey Integrations for Terminating an Employment

Manage Qualtrics Integrations settings to create an integration that sends an email to employees to obtain feedback through a Qualtrics survey before they leave the organization.

The email survey for Employee Central Terminating an Employment can help you find out more about how your employees felt about their jobs. For example, did the employees find the work challenging? How safe or unsafe was the working environment? Did they get along with their coworkers or their managers? Being able to find out why an employee leaves is an important way to improve your organization and make appropriate corrections or adjustments to the work environment.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

> ⓘ Note
>
> Make sure a business rule exists before you create this email survey integration. Refer to *Creating a Business Rule for Email Surveys* for details.

After you create your integration, change the timing of when this event is triggered by Intelligent Services. Otherwise, your employee gets an email survey as soon as the event is published in Intelligent Services, instead of a few days before their last day of employment. To do this, you need to edit your event in the Intelligent Services Center to change its timing. For example, if your employee's last date is September 30, you want your employee to receive the email survey on September 20, 10 days before the last day.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Employee Central*
Event Name	*Terminating an Employment*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Employee Central] Qualtrics: Exit Survey*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Changing the Timing for an Email Survey Event [page 63]
Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
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39.3 Email Survey Integrations for Learning

Manage Qualtrics Integrations settings to create an integration that sends email to employees to obtain feedback through a Qualtrics survey when they complete an assignment in SAP SuccessFactors Learning.

The email survey for SAP SuccessFactors Learning can help you find out how your employees feel about the assignment, which in turn help you make appropriate corrections or adjustments.

Enabling this email survey integration requires Learning, a Qualtrics Employee Experience license for Lifecycle projects, and enabling Intelligent Services and Integration Service Registration Center.

Intelligent Services sends data from the following fields to Qualtrics.

Field	Description
User ID	The student ID of the learner.
Item ID	A unique ID number for the Learning item.
Item Type ID	The type of item (for example, a course or an exam).
Revision Date	The date the Learning item was revised.
Completion Status ID	The ID given to the completion status.
Completion Date	The date that the learner completed the item.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Learning*
Event Name	*Learning Completion*
Survey Recipient	(Read-only) *Employee*
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a New Qualtrics Integration [page 67]
SuccessFactors Learning Administration Help
Enabling a Qualtrics Authentication in the Integration Service Registration Center [page 51]
Finding ID Information for Surveys in Qualtrics [page 65]
Settings for Email Survey Integrations [page 57]

39.4 Mentoring

39.4.1 Email Survey Integrations for Mentoring Ended

Manage Qualtrics Integrations settings to create an integration that sends email to employees to obtain feedback through a Qualtrics survey when the Mentoring relationship is ended by the other individual before the completion of the Mentoring program.

Mentoring program owners can create two different email survey integrations. Since **this** integration is designed to gather feedback from program participants when their mentor or mentee chooses to close the relationship early, you can design questions that focus on the relationship and how the matching process worked, instead of just the program as a whole.

When you set up this email survey integration, you should also create up the in-app survey integration, as described in *In-App Survey Integrations for End Mentoring*. That in-app survey is designed to complement this email survey by allowing you to get feedback from employees who choose to manually close their relationship with their mentor or mentee before the program is completed. Creating both integrations allows you to get feedback from both the employee who's ending the relationship, as well as the employee for whom the relationship was ended.

> Example
>
> This example describes what happens when you create both in-app and email survey integrations.
>
> Kathy Liu is Marco Rossi's mentor in the Mentoring program. For various reasons, Marco (the mentee) feels that Kathy (his mentor) is a mismatch, and decides to end the relationship while the Mentoring program is still running.
>
> - **In-app**: As soon as Marco (the mentee) chooses *End Mentoring* in his Mentoring program, a Qualtrics pop-up feedback opportunity appears right away on his screen.
> - **Email** (this integration): After Marco (the mentee) ends the relationship, the status in Kathy's mentor card on the Mentoring overview page displays the label *Mentoring Ended*. Kathy (the mentor) then receives an email with a link to a Qualtrics feedback opportunity.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Talent*

Fields	Values
Event Name	*Mentoring Ended* Use this option in conjunction with the in-app Mentoring survey.
Survey Recipient	(Read-only) *Mentor/Mentee*
Business Scenario Name	(Read-only) *[Talent] Qualtrics: Mentoring Relationship End*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Rule Configuration	The rule associated with this event that was created in Configure Business Rules.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a Business Rule for Email Surveys [page 61]
Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
In-App Survey Integrations for End Mentoring [page 86]
Email Survey Integrations for Mentoring Program Completion [page 115]
Finding ID Information for Surveys in Qualtrics [page 65]
Settings for Email Survey Integrations [page 57]
Using Mentoring

39.4.2 Email Survey Integrations for Mentoring Program Completion

Manage Qualtrics Integrations settings to create an integration that sends email to all participating mentors and mentees simultaneously to obtain feedback through a Qualtrics survey at the completion of the Mentoring program.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

Additionally, you can also create Qualtrics feedback opportunities for mentors or mentees who choose to end their Mentoring relationships before program completion. Refer to *In-App Survey Settings for End Mentoring* and *Email Survey Settings for Mentoring Ended* for details.

Integration Details

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Talent*
Event Name	*Mentoring Program Completed*
Survey Recipient	(Read-only) *All Mentors and Mentees*.
Business Scenario Name	(Read-only) *[Talent] Qualtrics: Complete Mentoring Program*.
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
Email Survey Integrations for Mentoring Ended [page 114]
In-App Survey Integrations for End Mentoring [page 86]
Finding ID Information for Surveys in Qualtrics [page 65]
Settings for Email Survey Integrations [page 57]
Using Mentoring

39.5 Onboarding

39.5.1 Email Survey Integrations for Onboarding Internal Hires

Manage Qualtrics Integrations settings to create an integration that sends email to employees to obtain feedback through a Qualtrics survey when an internal hire step is completed.

The email survey for internal hires can help you find out more about how your employees feel as they start their new roles at your organization, as well as their past roles. For example, how well do they understand their new role and responsibilities? How accurate was the description of the role during the interview process? How challenging is their new role so far? Finding out what employees think about their new role helps you make appropriate corrections or adjustments to the work environment.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

In addition to setting up your Qualtrics integration with SAP SuccessFactors and configuring event settings for email surveys, you need the following to create an email survey integration for internal hires:

- You're using the latest Onboarding.
- You're initiating crossboarding for employees using one of these methods:
  - SAP SuccessFactors Recruiting – initiating internal hires from a requisition page for an internal applicant.
  - *Add new hire to onboarding* – initiating onboarding from the Admin Center.

Integration Settings

Specify the following values to create this integration.

Fields	Description
Integration Name	A unique name for the integration.
Product Area	*Onboarding*
Event Name	*Internal Hire Process Completed*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Onboarding] Qualtrics: Email Survey to New Internal Hires*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
Implementing Onboarding
Finding ID Information for Surveys in Qualtrics [page 65]
Settings for Email Survey Integrations [page 57]

39.5.2 Email Survey Integrations for Onboarding New Hires

Manage Qualtrics Integrations settings to create an integration that sends email to employees to obtain feedback through a Qualtrics survey to find out what they thought about their onboarding experience.

The email survey for Onboarding for new hires can help you find out more about how your employees feel as they start their new roles at your organization. For example, how well do they understand their role and responsibilities? How accurate was the description of the role during the interview process? How challenging is their role so far?

Finding out what employees think about their new role helps you make appropriate corrections or adjustments to the work environment.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

In addition to setting up your Qualtrics integration with SAP SuccessFactors and configuring event settings for email surveys, you need the following to create an email survey integration for Onboarding:

- You're using the latest Onboarding.
- You're initiating onboarding for new hires using one of these methods:
  - SAP SuccessFactors Recruiting – initiating onboarding from a requisition page for an external applicant.
  - *Add new hire to onboarding* – initiating onboarding from the Admin Center.
  - An external Applicant Tracking System.

Integration Settings

Specify the following values to create this integration.

Fields	Description
Integration Name	A unique name for the integration.
Product Area	*Onboarding*
Event Name	*External User Eligible for Hire*
Survey Recipient	(Read-only) *New Hire*
Business Scenario Name	(Read-only) *[Onboarding] Email Survey to New Hires*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
Implementing Onboarding
Finding ID Information for Surveys in Qualtrics [page 65]
Settings for Email Survey Integrations [page 57]

39.5.3 Email Survey Integrations for Offboarding

Manage Qualtrics Integrations settings to create an integration that sends email to employees to obtain feedback through a Qualtrics survey when you set up an offboarding process for them to leave the company.

The email survey for Offboarding can help you find out how your employees feel about the process, which in turn helps you make appropriate corrections or adjustments to Offboarding.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

In addition to setting up your Qualtrics integration with SAP SuccessFactors and configuring event settings for email surveys, you need to be using the latest Onboarding to create an email survey integration for Offboarding.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Onboarding*
Event Name	*Initiate Offboarding*
Survey Recipient	(Read-only) *Employee*
Business Scenario Name	(Read-only) *[Onboarding] Email Survey for Offboarding Employees*
OAuth Configuration	The outbound OAuth configuration for Qualtrics that was created in the Security Center.
Project ID	The project ID for your Lifecycle project, from your Qualtrics account.

Related Information

Creating a New Qualtrics Integration [page 67]
Creating Outbound OAuth Configurations for Qualtrics APIs for Email Survey Integrations [page 59]
Implementing Onboarding
Finding ID Information for Surveys in Qualtrics [page 65]
Settings for Email Survey Integrations [page 57]

39.6 Email Survey Integrations for Recruiting

Manage Qualtrics Integrations settings to create an integration that sends email to candidates to obtain feedback through a Qualtrics survey when there is an application status change in SAP SuccessFactors Recruiting.

The email survey for SAP SuccessFactors Recruiting can help you find out how candidates feel when there's a change in their application status, which in turn can help you make appropriate corrections or adjustments to your process.

Enabling this email survey integration requires Recruiting, a Qualtrics Candidate Experience license, and enabling Intelligent Services and Integration Service Registration Center.

For some ideas or sample questions, go to the Survey Library, which you can access from within your Qualtrics project.

Integration Settings

Specify the following values to create this integration.

Fields	Values
Integration Name	A unique name for the integration.
Product Area	*Recruiting*
Event Name	*Application Status Change*
Survey Recipient	(Read-only) *Candidate*
Directory ID	Enter the Directory ID, located in the Directories section of the Qualtrics IDs tab in your Qualtrics My Account page.
Mailing List ID	Enter the Mailing List ID, located in the Mailing Lists section of the Qualtrics IDs tab in your Qualtrics My Account page. **Note** Specify the unique ID here, **not** the Mailing List name.

Related Information

Setting Up and Maintaining SAP SuccessFactors Recruiting
Finding ID Information for Surveys in Qualtrics [page 65]

40 Adding a Feedback Tab to Recruiting Career Site Pages

You can add JavaScript code in Career Site Builder to add a Qualtrics feedback tab to all your career site pages, or to a specific career site page.

Prerequisites

You've created a Qualtrics project for your survey, and you have its site intercept ID to add in the JavaScript code.

Context

> **Note**
>
> You can improve your candidate's experience by using the purpose-build, preconfigured Candidate Experience program from Qualtrics, which provides a robust set of capabilities specific to your recruiting-related campaigns.
>
> Existing recruiting-related in-app surveys you created using Employee Experience will continue to work. If you purchase a license for the Candidate Experience program, you'd then retire your existing SAP SuccessFactors Recruiting surveys and create new ones in the Candidate Experience.

Unlike the Qualtrics integration that allows you to display a feedback opportunity directly on the job application confirmation page, this option allows you to add a small *Feedback* tab on a career site page. The location where you insert the JavaScript code depends on whether you want to add it for all your career site pages, or to just a specific page.

This functionality doesn't work if have the following conditions:

- Assessment is configured
- Profile before application is enabled

Procedure

1. Choose whether you want to add the feedback tab on all your career site pages, or to just a specific page.

Option	Description
To add a feedback tab to all your career site pages	Select the *JavaScript* tab in *Appearance* > *Global*.

Option	Description
	ⓘ Note Adding the code here affects **all** your career site pages, regardless of brand.
To add a feedback tab to a specific career site page	Select *Add Component* on any Career Site Builder page.

2. Add the following JavaScript code in the textbox, replacing <site_intercept_ID> with your intercept ID and <site_intercept_URL> with your intercept's URL, and for your Qualtrics project:

```
<!--BEGIN QUALTRICS WEBSITE FEEDBACK SNIPPET-->
<script type='text/javascript'>
(function(){var g=function(e,h,f,g){
this.get=function(a){for(var
a=a+"=",c=document.cookie.split(";"),b=0,e=c.length;b<e;b++){for(var
d=c[b];" "==d.charAt(0);)d=d.substring(1,d.length);if(0==d.indexOf(a))return
d.substring(a.length,d.length)}return null};
this.set=function(a,c){var b="",b=new Date;b.setTime(b.getTime()+6048E5);b=";
expires="+b.toGMTString();document.cookie=a+"="+c+b+"; path=/; "};
this.check=function(){var a=this.get(f);if(a)a=a.split(":");else if(100!
=e)"v"==h&&(e=Math.random()>=e/100?0:100),a=[h,e,0],this.set(f,a.join(":"));else
return!0;var c=a[1];if(100==c)return!0;switch(a[0]){case "v":return!1;case
"r":return c=a[2]%Math.floor(100/c),a[2]++,this.set(f,a.join(":")),!c}return!0};
this.go=function(){if(this.check()){var
a=document.createElement("script");a.type="text/
javascript";a.src=g;document.body&&document.body.appendChild(a)}};
this.start=function(){var t=this;"complete"!==document.readyState?
window.addEventListener?window.addEventListener("load",function(){t.go()},!
1):window.attachEvent&&window.attachEvent("onload",function(){t.go()}):t.go()};};
try{(new
g(100,"r","<site_intercept_ID>","<site_intercept_URL>")).start()}catch(i){}})();
</script><div id='ZN_3VqBoAk3Bayxngh'><!--DO NOT REMOVE-CONTENTS PLACED HERE--></
div>
<!--END WEBSITE FEEDBACK SNIPPET-->
```

The site intercept ID uses a pattern similar to "`QSI_X_XX_xxxxxxxxxxxxxxx`", and the intercept URL should look similar to "`https://xxxxxxxxxxxxxxx-xxxxxxxxxxx.siteintercept.qualtrics.com/XXX/?QSI_X_XX_xxxxxxxxxxxxxxx`."

Related Information

Setting Up and Maintaining SAP SuccessFactors Recruiting

41 Showing a Survey Card on the Home Page

You can display links to Qualtrics surveys on the home page.

Prerequisites

- You have *Manage Home Page* permission.
- If you use Qualtrics:
  - Your organization has a Qualtrics Employee XM license.
  - You've created a survey in your Qualtrics account that you want to use on the home page.

Context

If you use Qualtrics, when employees select the link on a survey card, they're sent to the feedback opportunity in Qualtrics directly. As the home page administrator, you don't have to configure *Manage Qualtrics Integrations* and you aren't limited to the available in-app and email surveys options there.

If you don't use Qualtrics, you can also add a link to another application.

Procedure

1. Go to *Admin Center* > *Manage Home Page* > *Surveys*.
2. Choose + (Add survey) to create a survey card.

   The Add Survey dialog appears.
3. Complete the following fields.

Option	Description
Title	Enter a survey name that appears as the title of the survey card. For example, **`Employee Engagement Survey`**. Choose (Translate) to add translations for other languages in the system.
Description	Enter a brief description of the survey, or ask the employee to participate. For example, **`Spend a moment to let us know how you're feeling!`** Choose (Translate) to add translations for other languages in the system.

Option	Description
Enabled	To show the card on the home page, set the *Enabled* switch to *On*. Otherwise, keep it set to *Off* until you're ready.
Date Range	The dates you want the survey to appear on the home page.
URL	The URL to the survey.
Target Group	Specify which user groups can see the card: • Select *Dynamic Groups* to specify one or more existing dynamic groups. Or choose ••• (More) to create a new dynamic group first. • Select *Permission Roles and Groups* to specify one or more existing permission roles or permission groups. Note The default target group is "Everyone (All Employees)".

The dialog disappears and you see the new survey listed in the Surveys section of the *Manage Home Page* page.

4. Choose *Save*.

Results

Your survey now appears as a home page card, and employees can now participate in your survey.

Next Steps

You can edit configuration of the survey card by selecting the (Edit survey) icon, or delete it by selecting the (Delete survey) icon.

Related Information

Managing the Home Page

42 Change History

Learn about changes to the documentation for Integrating SAP SuccessFactors with Qualtrics in recent releases.

2H 2024

Type of Change	Description	More Info
Changed	We added permission information for users to the *QualtricsProjectAndSiteData* and *QualtricsEmailSurveyData* permissions.	Assigning Role-Based Permissions to Use Qualtrics with SAP SuccessFactors [page 37]

1H 2024

Type of Change	Description	More Info
Changed	We've removed the note stating that Identity Authetication isn't supported for Qualtrics, and added a Tip pointing to the documentation for setting up Identity Authentication as an Identity Provider for Qualtrics.	Setting Up Single Sign-On for Qualtrics [page 41]

2H 2023

Type of Change	Description	More Info
Changed	We've moved *Change History* to the end of the guide.	Integrating SAP SuccessFactors with Qualtrics [page 5]

1H 2023

Type of Change	Description	More Info
Changed	We've corrected the path to enable Mobile surveys for performance reviews.	Enabling Mobile Surveys for Performance Reviews [page 48]

Type of Change	Description	More Info
Added	We've added the Onboarding Guided Experience from the SAP SuccessFactors Work Zone in the list of feedback opportunities.	List of SAP SuccessFactors Product Areas and Components That Can Use Qualtrics [page 7]
Changed	We've updated values in Manage Qualtrics Integrations to reduce confusion and to make them consistent with the terminology used in various SAP SuccessFactors modules. Compensation: • The product area for Rewarding is now Compensation. • In-app integration for *Spot Award Nomination* is now *Awards*. Employee Central: • The Product Area field for the in-app integration *New Hire, Rehire, and Open Enrollment* has changed from Benefits to Employee Central. • The email survey integration event name for *Employment Termination* has changed to *Terminating an Employment*. Learning: • Email survey integration event name *Completion of Learning* is now *Learning Completion* Mentoring: • In-app integration page name *View as Mentor/Mentee* is now *End Mentoring*. • Email survey integration *End a Mentoring Relationship* is now *Mentoring Ended*. • Email survey integration *Complete a Mentoring Program* is now *Mentoring Program Completed*.	In-App Survey Integrations for Award Nominations [page 80] In-App Survey Integrations for Compensation Form Completion [page 81] In-App Survey Integrations for Employee Central Global Benefits for New Hires, Rehires, and Open Enrollment [page 82] Email Survey Integrations for Learning [page 112] In-App Survey Integrations for End Mentoring [page 86] Email Survey Integrations for Mentoring Ended [page 114] Email Survey Integrations for Mentoring Program Completion [page 115] Email Survey Integrations for Terminating an Employment [page 111]
Changed	The topic *Creating a Business Rule for Employee Central Email Surveys* has been revised to remove "Employee Central" from its title, because business rules are also specified when creating email survey integrations for some other modules.	Creating a Business Rule for Email Surveys [page 61]

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