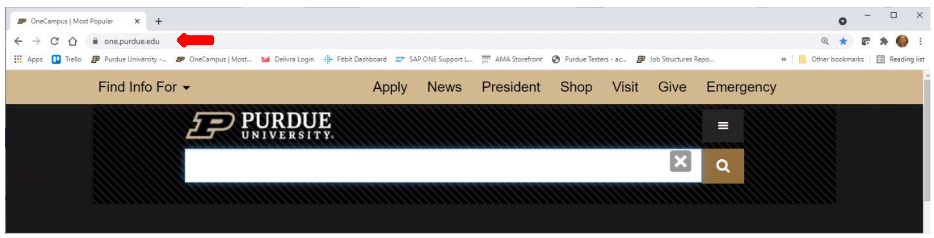
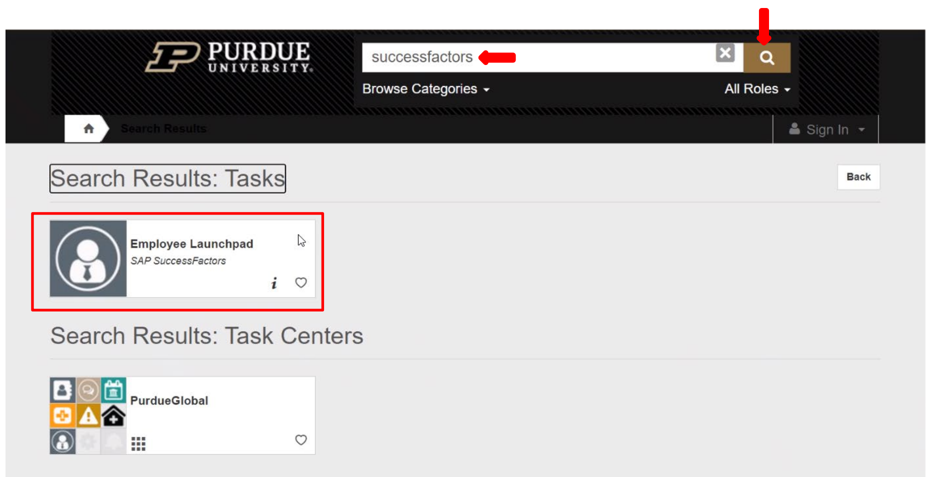
Contents

1. Log into SuccessFactors (Click here to watch a short video)

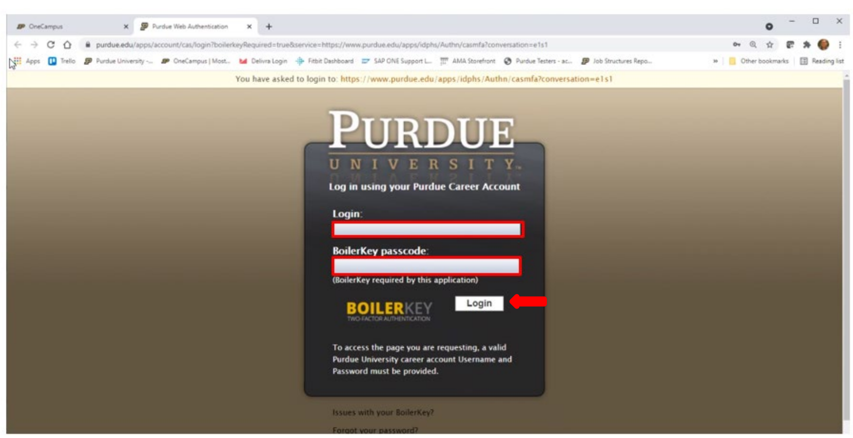
1. Enter https://one.purdue.edu/ into the browser.



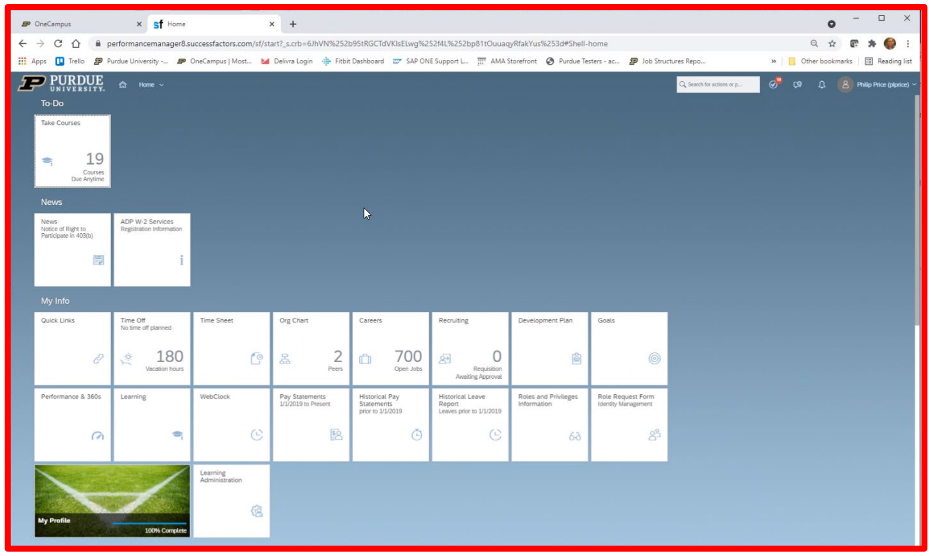
2. Next, enter 'successfactors' into the search field, click the 'Search Icon', and scroll down to the ***Search Results:*** and click the 'Employee Launchpad' tile. A new screen will appear requesting your Purdue Career Account information.



3. In the new screen, enter your 'Login' and 'BoilerKey passcode' credentials and click 'Login'.



4. **Congratulations!** You are now viewing the SuccessFactors 'Home' landing-page.



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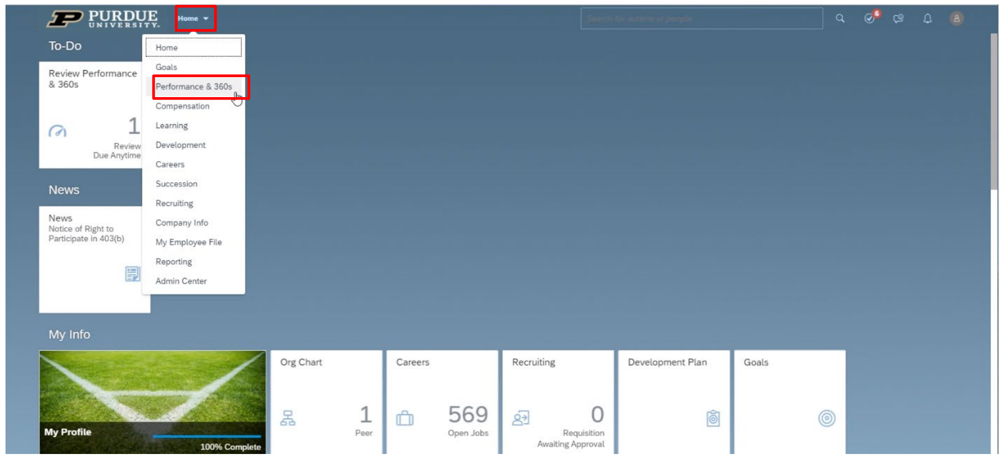
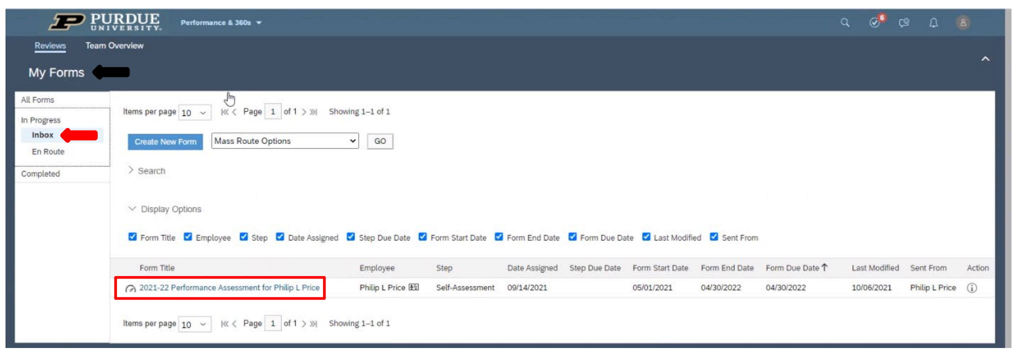
2. Access my assessment form (Click here to watch a short video)

1. Navigate to the SuccessFactors landing-page. Click the 'Home' drop-down menu. Next, click the 'Performance & 360s' link and the ***My Forms*** Screen will appear.

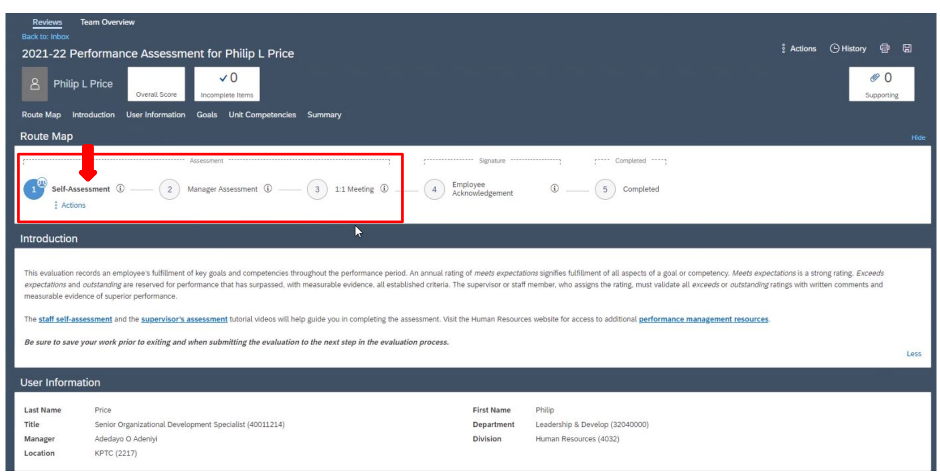


2. Once on the ***My Forms*** page, click 'Inbox'. This will customize how assessments appear on your screen.

- Next, scroll down and identify which assessment to open. Click the 'Form Title' name to open a specific form.

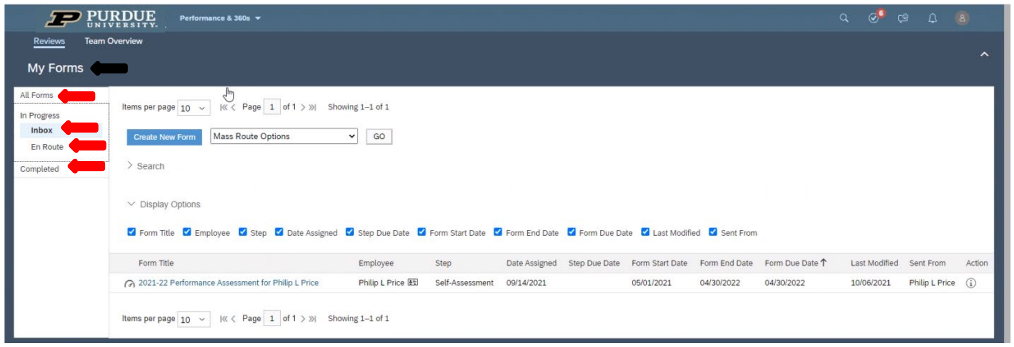


3. **Congratulations!** You have accessed the assessment form. You can now begin the work of completing your self-assessment.



4. Here are some additional tips for accessing forms on the ***My Forms*** page.

- Review the **My Forms** navigation tabs on the top left-side of your screen.
- Click the ‘All Forms’ tab to access past and present forms assigned to you.
- Click the ‘Inbox’ to access assessment forms requiring your action.
- Click the ‘En Route’ tab to view assessment forms requiring the actions of others.
- Click the ‘Completed’ tab to access completed assessments appearing in your completed tab.



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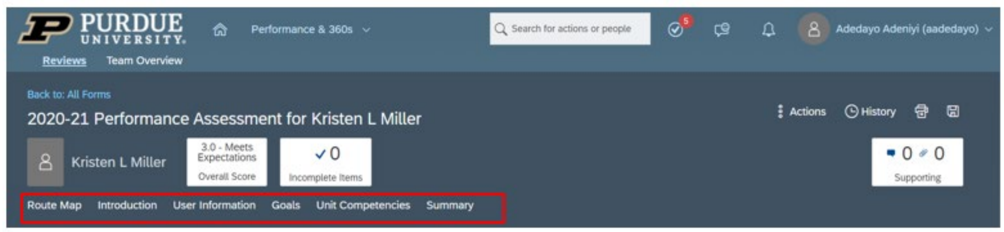
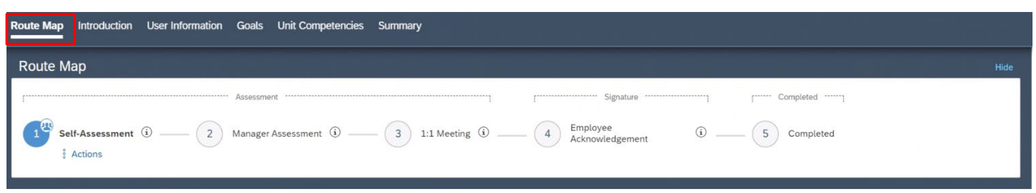
3. Understand the performance assessment form

1. Become familiar with the 'Print', 'Save', and 'Attach Document' functionality appearing in the top right-side of the screen. (Attend a *webinar* or visit Performance Management @ Purdue *(videos)* to learn more about these and other functions)

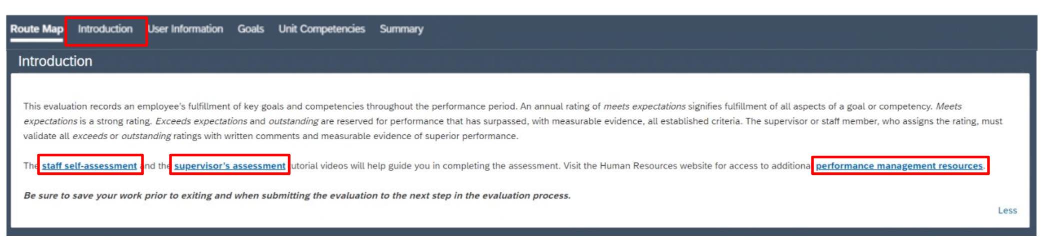
2. Become familiar with the six 'Navigation Tabs' on the top left-side the screen. Use each tab ***(Route Map, Introduction, User Information, Goals, Unit Competencies, and Summary)*** to quickly access sections of the assessment form.



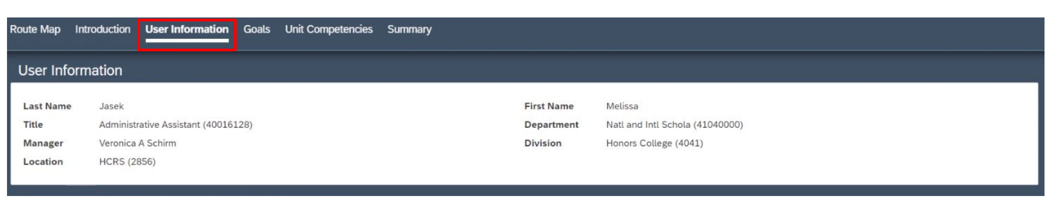
- Use 'Route Map' tab to identify the location of the assessment form.



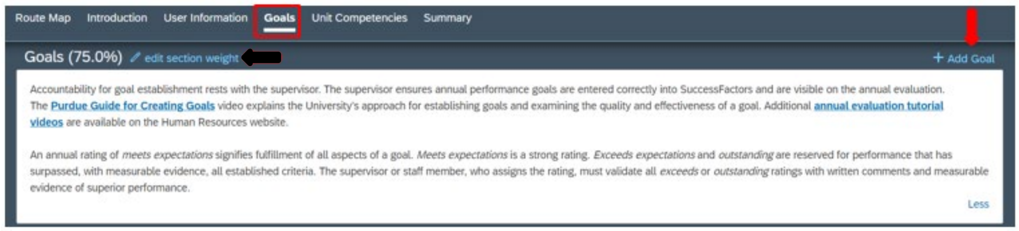
- Use 'Introduction' tab to view basic guidance for completing the evaluation and to access on-demand resources.



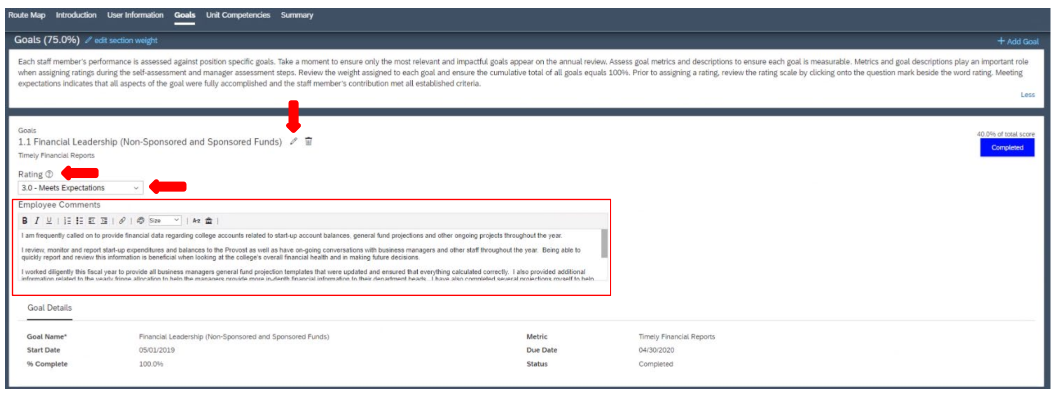
- Use 'User Information' tab to view relevant position data.



- Use 'Goals' tab to navigate to the section, review HR guidance, and access resources. Use 'Add Goal' button to enter new goals as appropriate. Use the **'Edit Section Weight'** functionality only when given specific direction by HR or senior leadership to make changes.

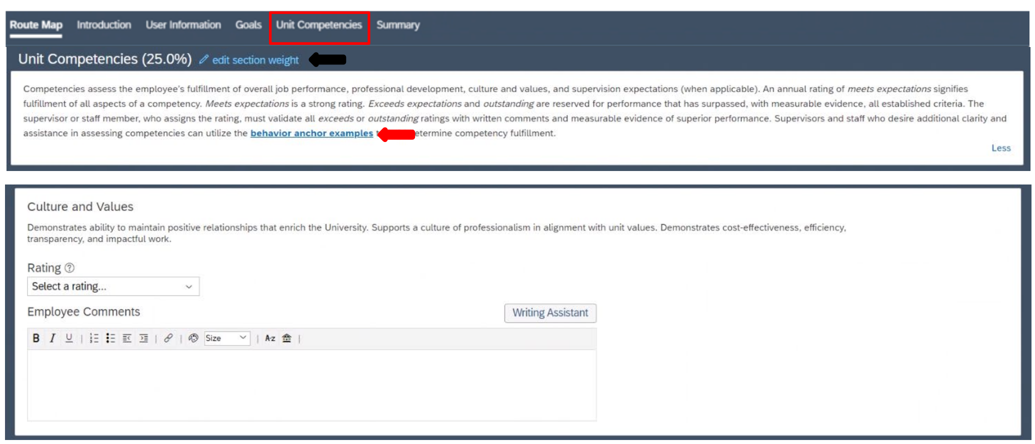


- Use 'Pencil' icon tab to edit existing criteria. Use the 'Question Mark' to view rating scale. Use 'Rating Drop-down Menu' and enter a rating. Enter 'Employee Comments' into the open field.

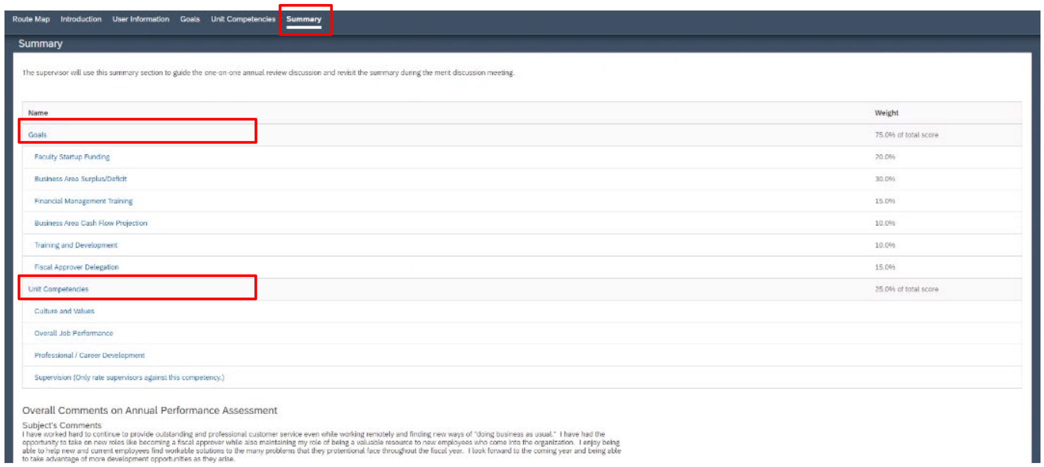


- Use 'Unit Competencies' tab to navigate to the section and review HR guidance. Use the **'Edit Section Weight'** functionality only when given specific direction by HR or senior leadership to make changes.

  Use 'Behavior Anchor Rating Scale' to view HR guidance and gain a deeper understanding of the four competencies ***'Culture and Values', 'Overall Job Performance'***, ***'Profession/Career Development'***, and ***'Supervision'***.



- Use 'Summary' tab to navigate to the section. View a snapshot of all goals and competencies appearing on the form.



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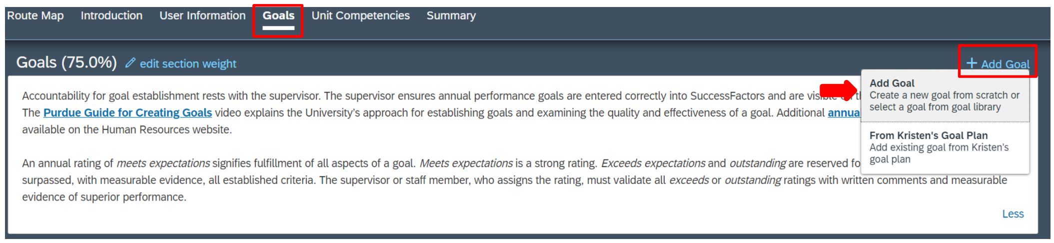
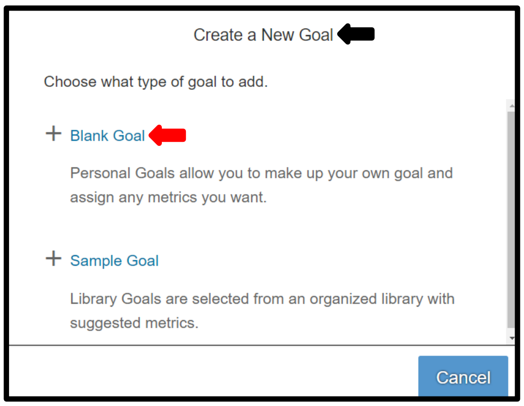
4. Add new goal(s) as approprate

1. Click 'Goals' and navigate to the section. Next, click 'Add Goal' tab and select the 'Add Goal' option. A ***Create a New Goal*** screen will appear.

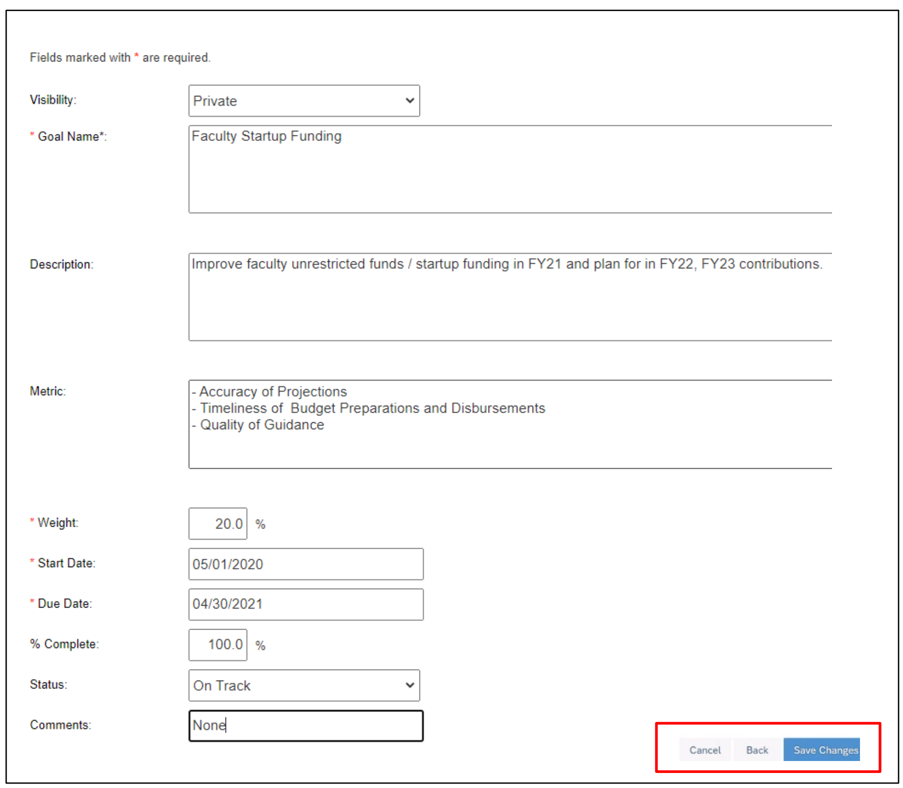
- Once on the ***Create a New Goal*** screen, click 'Blank Goal' and a new screen will appear allowing you to enter goal criteria. (watch a short video)



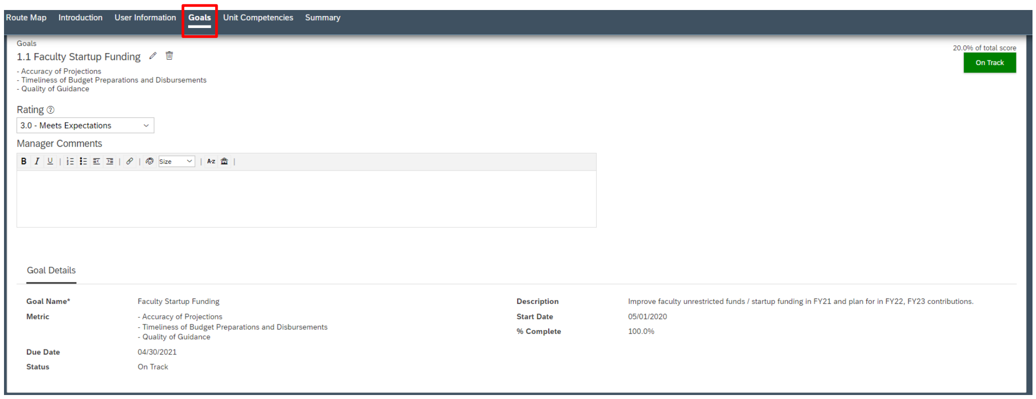


2. Staff are encouraged to work with their supervisors to enter criteria into all fields appearing on the goal plan. However, 'Goal Name', 'Weights', 'Start Date', and 'Due Date' are the only required fields.

- Lastly, be sure to click the 'Save Changes' button after entering the goal criteria. Data will be lost if the save changes button is not clicked.
- View the Purdue Guide for Creating Goals video (5 minutes) for additional support.



3. **Congratulations**, you have successfully added a new goal to your goal plan. The goal will also appear on your assessment form. Repeat the above process to add additional goals.



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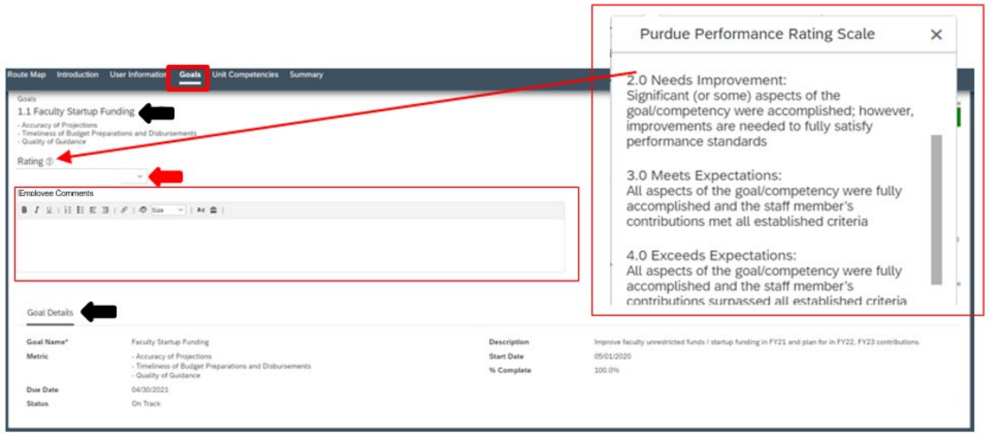
5. Enter goal ratings and comments (Click here to watch short video)

1. Click 'Goals' tab, scroll down to the ***Goal Name*** you wish to rate, and review its ***Goal Details***. Next click the **'**Question Mark**'** to view the rating scale. Next click the 'Drop-down Arrow' and assign a rating. Lastly, enter 'Employee Comments' to support the rating.
   - Watch the Purdue Guide for Rating Annual Performance (5:00 minutes) and access HR's Guidance for additional support.

2. **Congratulations**, you have successfully rated a goal. Repeat the above steps for all unrated goals.



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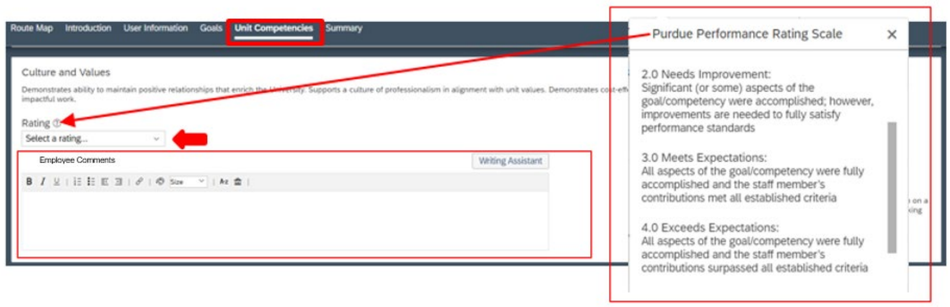
6. Enter competency ratings and comments (Click here watch short video)

1. Click 'Unit Competencies' and scroll down to the name of the competency you would like to rate. Next, click the 'Question-mark' to view the rating scale. Next click the 'Drop-down Arrow' and select the appropriate rating. Lastly, enter 'Employee Comments' to support the rating.
   - Watch the Purdue Guide for Rating Annual Performance (5:00 minutes) and access HR's Guidance for additional support.
   - Use the Behavior Anchor Rating Scale link to gain a deeper understanding of the four competencies

2. **Congratulations**, you have successfully rated a competency. Repeat the above steps for all unrated competencies.



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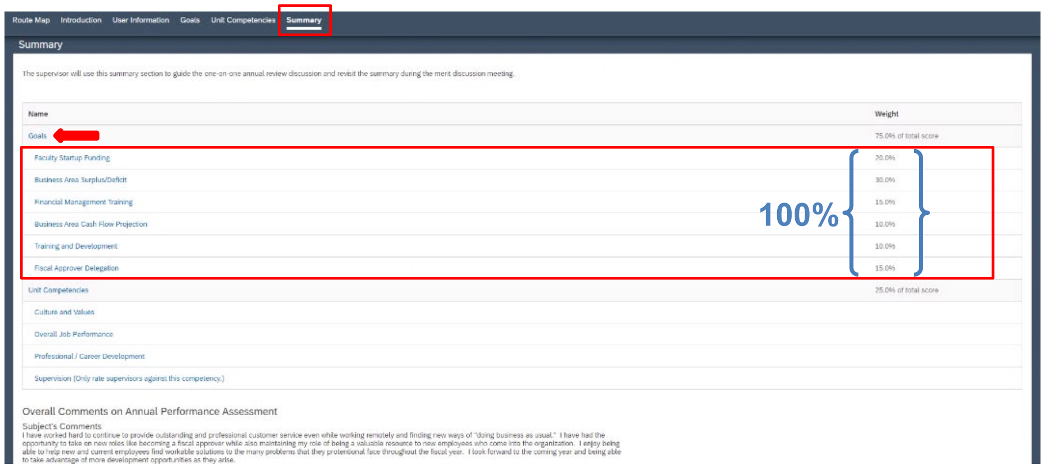
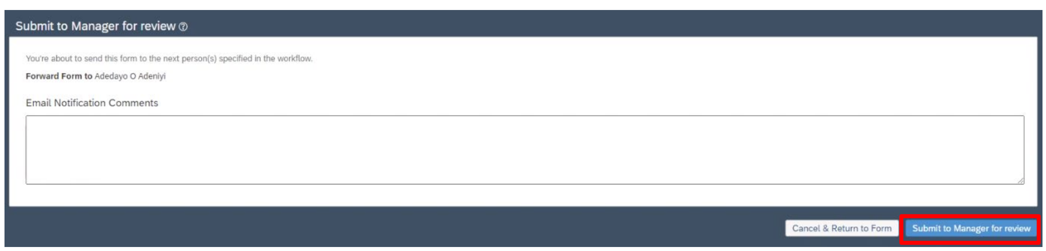
7. Submit my self-assessment to supervisor

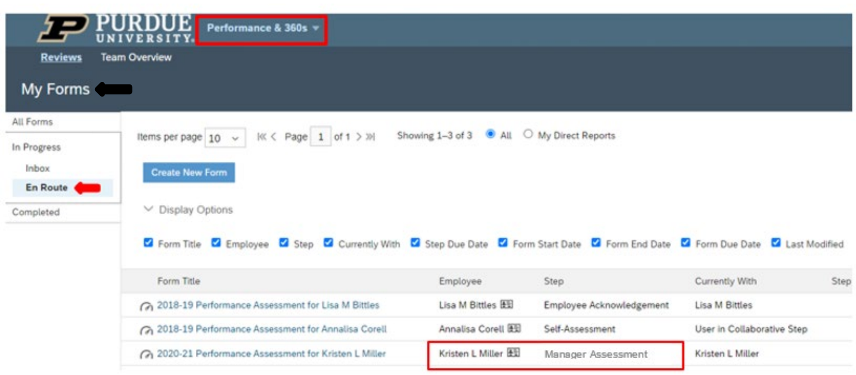
1. Click 'Summary' and navigate to the section. View a snapshot of all goals and competencies appearing on the assessment form.
   - Add the goal weights together. ***A cumulative goal weight of 100% is required*** prior to submitting the assessment to the next step. A cumulative goal total above or below 100% will result in an error message when attempting to advance the form.



2. Next, scroll to the very bottom of the form and click 'Submit to Manager for Review' and a new screen will appear.
   - Once on the new screen, click 'Submit to Manager for Review' a second time and the ***My Forms*** page will appear.



3. **Congratulations!** You have sent your self-assessment to your manager. The form now appears in your 'En Route' tab showing action is required by your supervisor.



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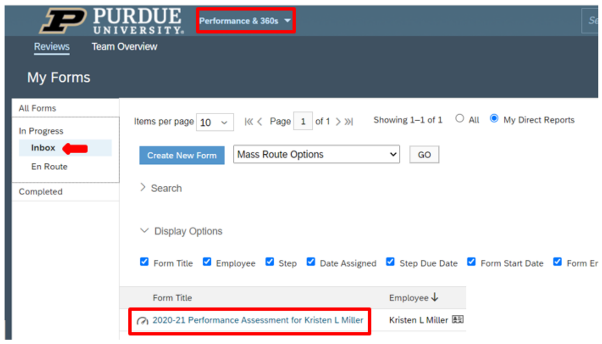
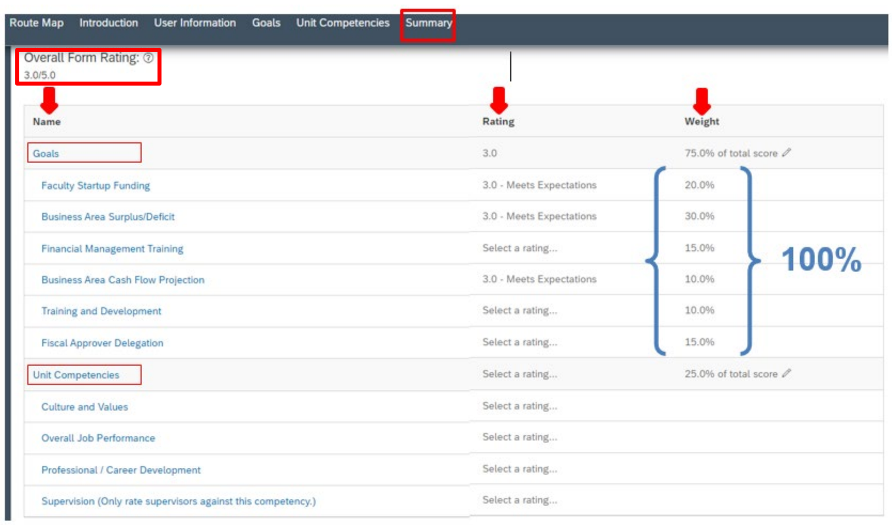
8. Acknowledge and sign the assessment (Click here to watch a short video)

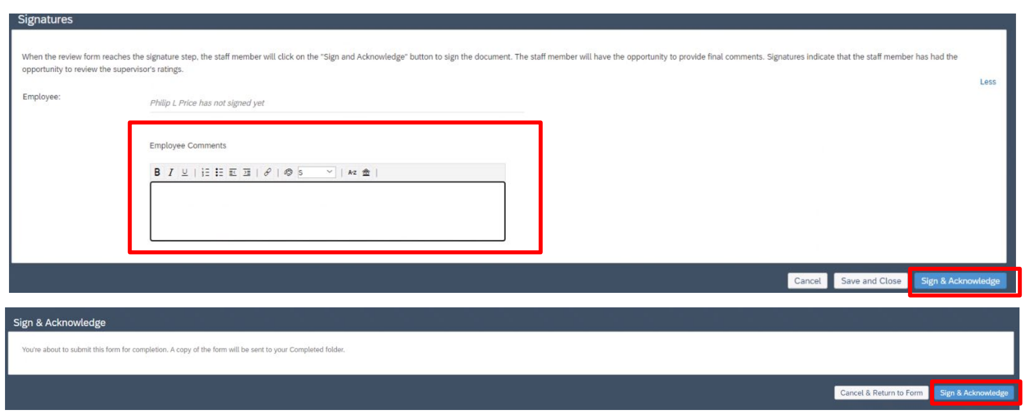
1. Navigate back to the 'Performance & 360" page and click 'Inbox'.
   - Next, scroll down to identify with assessment to open and click the 'Form Title' name to open the form.



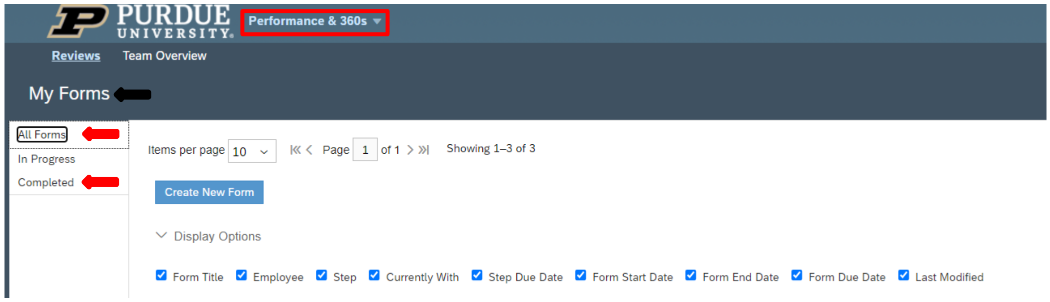
2. Once you have accessed the form, click the 'Summary' tab to view a snapshot of the supervisor's assessment.
   - Review the 'Overall Form Rating Score' which represents the combined average of the goal and unit competency scores.
   - Review the 'Goal' and 'Unit Competency' 'Ratings' and 'Weight'.



3. Next, scroll to the very bottom of the form, enter final employee comments, and click the 'Sign and Acknowledge' tab. A new screen will appear.
   - Once on the new screen, click 'Sign & Acknowledge' a second time and the ***My Forms*** page will reappear.



4. **Congratulations!** You have signed and acknowledged the performance assessment. In the future, you can access this completed assessment form by navigating to the 'Performance & 360' ***My Forms*** page and clicking 'Completed Forms' or 'All Forms' tabs.



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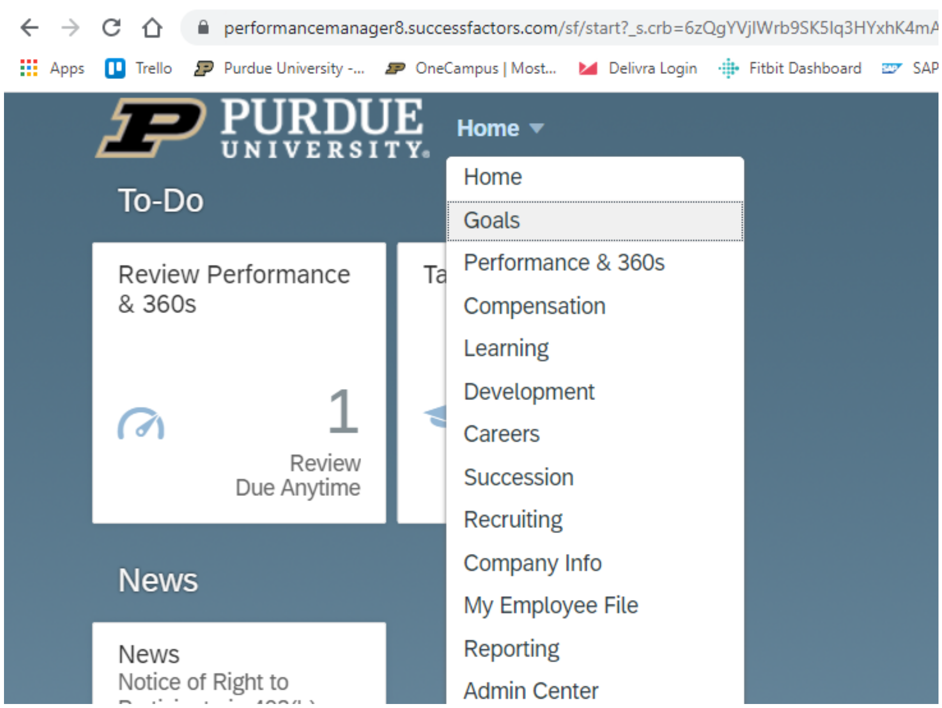
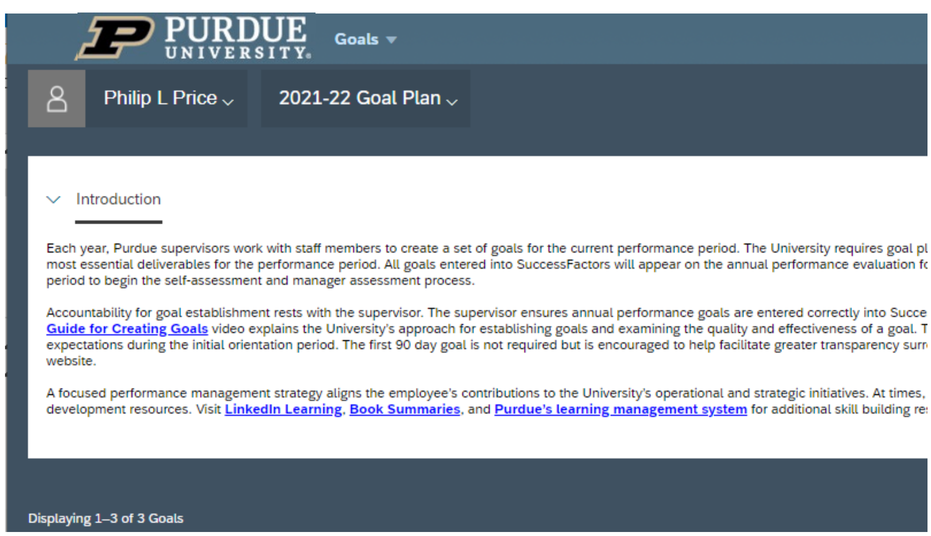
9. Establish the future goal plan

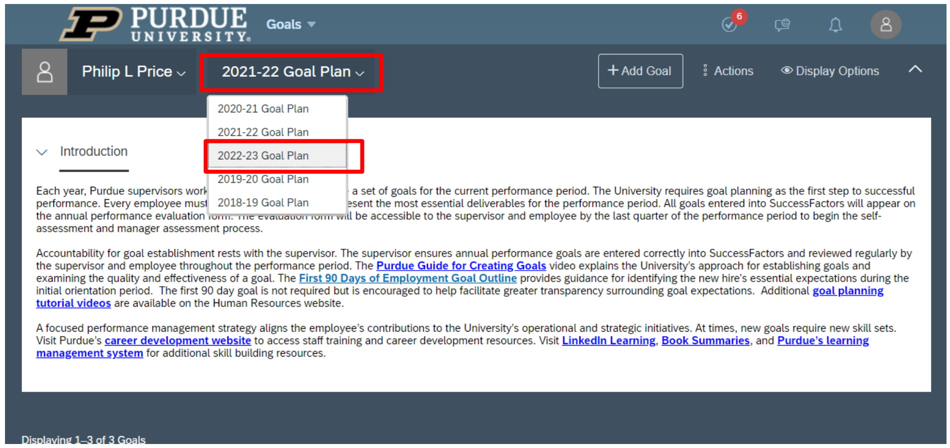
1. Navigate to the SuccessFactors landing-page. Click the 'Home' drop-down menu. Next, click the 'Goals' link to advance to your goal plan.



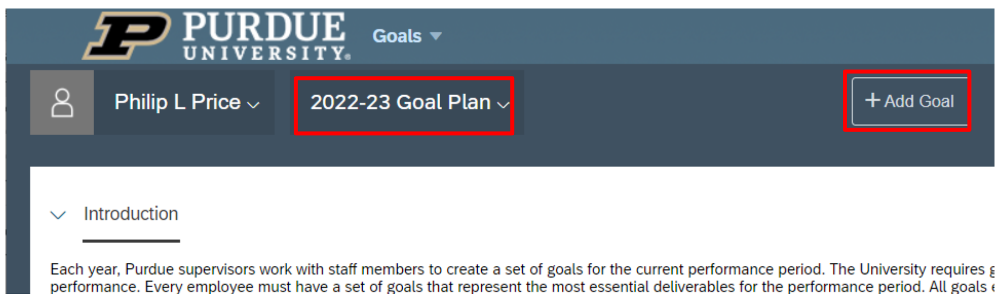
2. You are now in your goal plan.



3. Navigate to the top of the plan and observe the goal plan date. Click the 'Goal Plan Drop Down Button', and select the 'Desired Goal Plan'. The desired goal plan will appear on your screen.



4. **Congratulations!** You have successfully navigated to your 'Future Goals Plan'. Next, click the 'Add Goal' button to begin adding goals to the plan. For additional instructions on how to add a new goal, reference page 8 of this quick reference guide or **watch this short video**.



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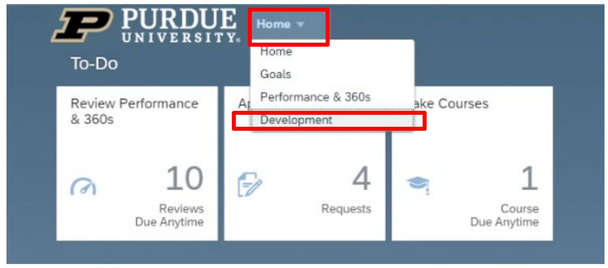
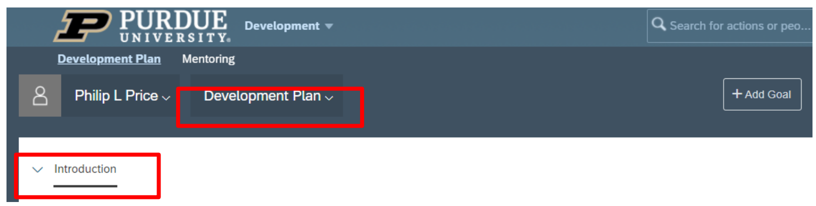
10. Establish skills and career development goals

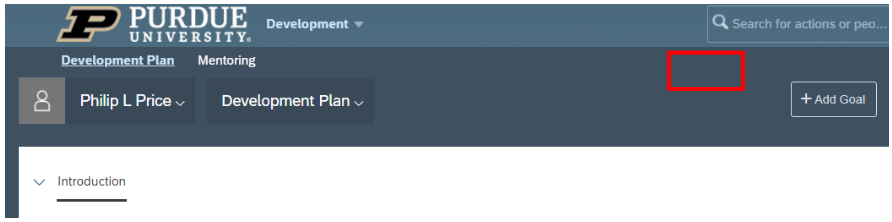
1. Navigate to the SuccessFactors landing-page. Click the 'Home' drop-down menu. Next, click the 'Development' link and advance to your development plan.

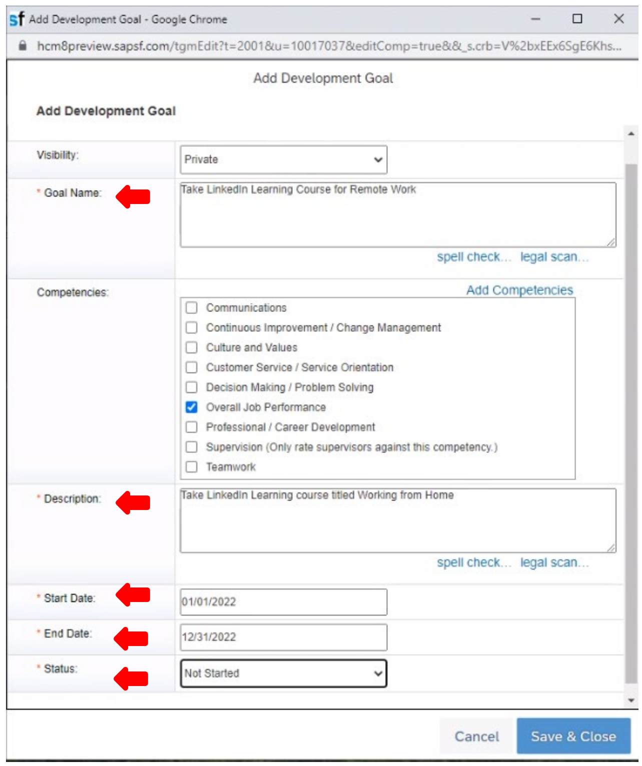


2. You are now in your 'Development Plan'. Before advancing, click the 'Introduction Drop-Down Menu' to access skills and career development resources available to Purdue employees and supervisors.

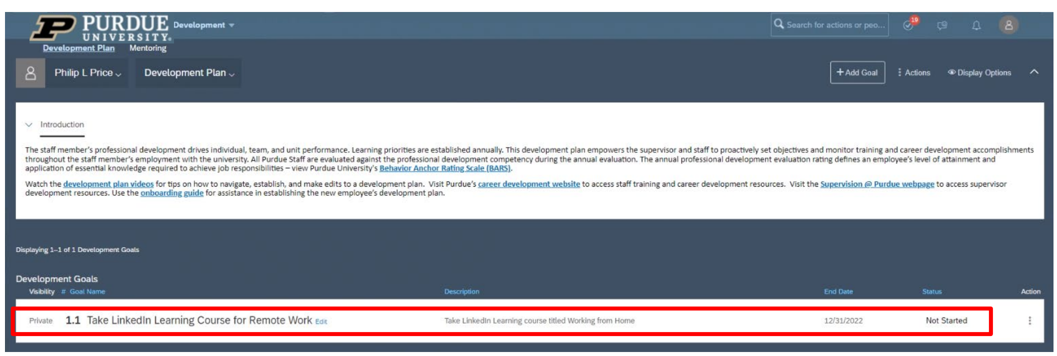


3. Next, click the 'Add Goal' button and a new screen will appear. Enter 'Goal Name', Description, 'Start Date', 'End Date', and 'Status' information then click 'Save and Close'. The goal will now appear in the direct report's goal plan. A sample screen shot appears below.





4. **Congratulations!** You have successfully added a 'Development Goal' to the direct report's development plan.



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