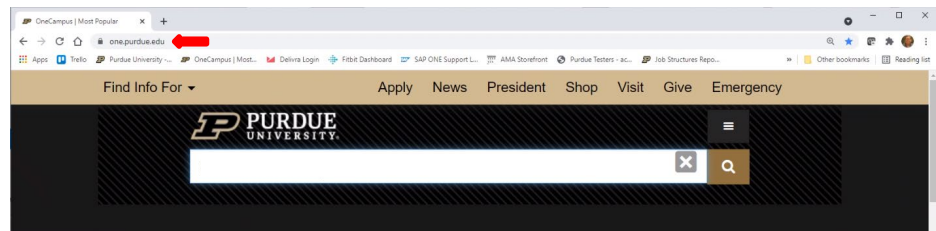


Contents

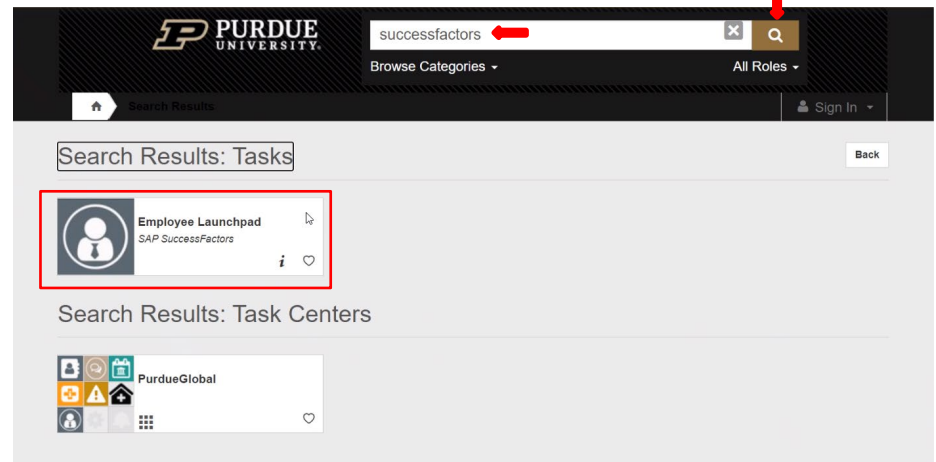
1. [Log into SuccessFactors](#) (pages 1 - 2)
2. [Access direct report's assessment form](#) (pages 3 - 4)
3. [Understand the performance assessment form](#) (pages 5 - 8)
4. [Add new goal\(s\) as appropriate](#) (pages 9 - 10)
5. [Enter goal ratings and comments](#) (page 11)
6. [Enter competency ratings and comments](#) (page 12)
7. [Send assessment-form to meeting step](#) (page 13)
8. [Send assessment-form to acknowledgment step](#) (page 14)
9. [Access reports](#) (pages 15)
10. [Establish the future goal plan for a direct report](#) (page 16-17)
11. [Establish skills and career goals for a direct report](#) (page 18-20)

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

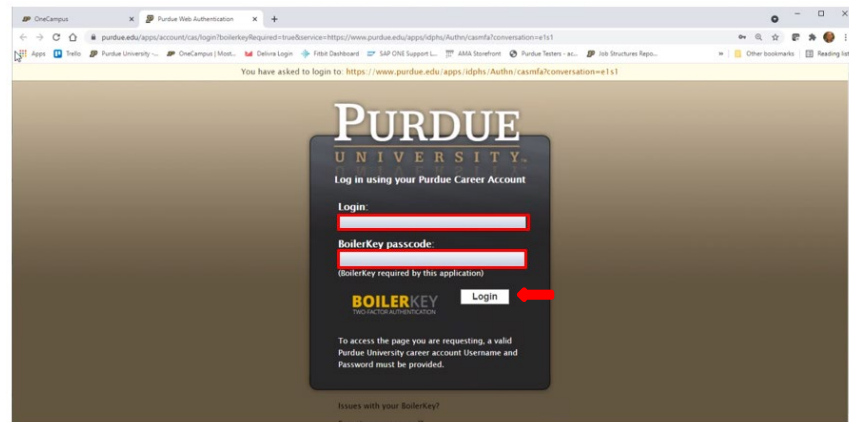
1. Enter <https://one.purdue.edu/> into the browser.



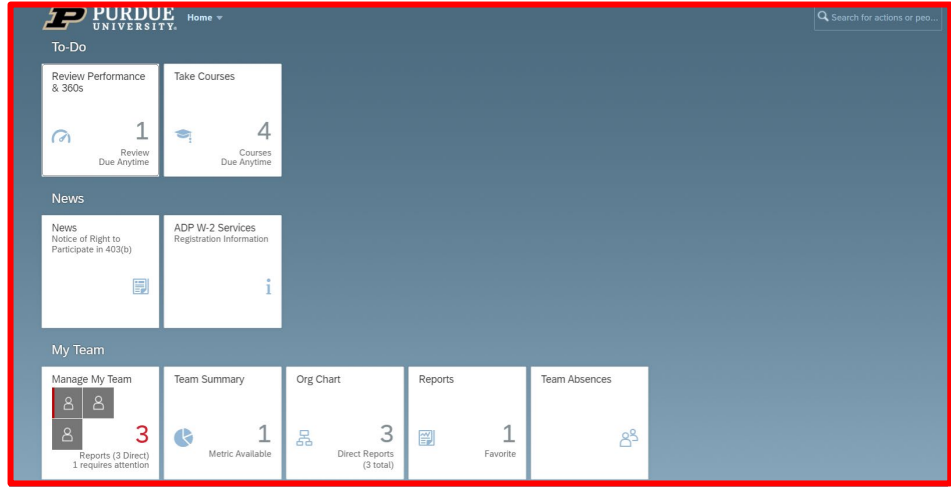
- Next, enter 'successfactors' into the search field, click the 'Search Icon', and scroll down to the **Search Results:** and click the 'Employee Launchpad' tile. A new screen will appear requesting the manager to enter their Purdue Career Account information.



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



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

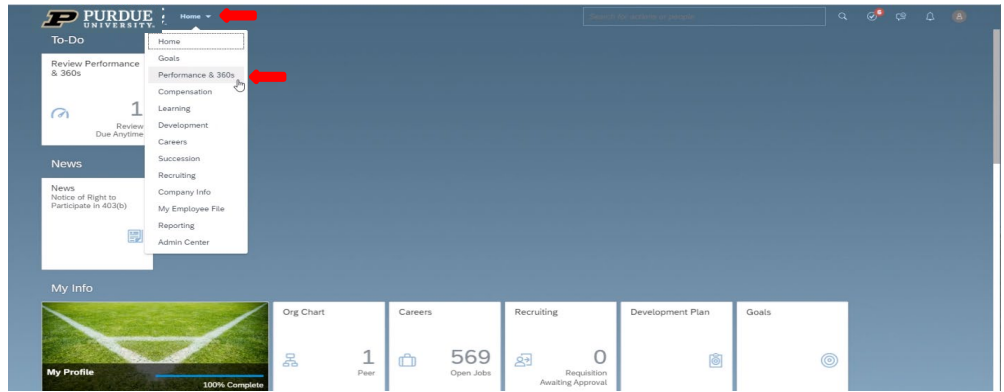


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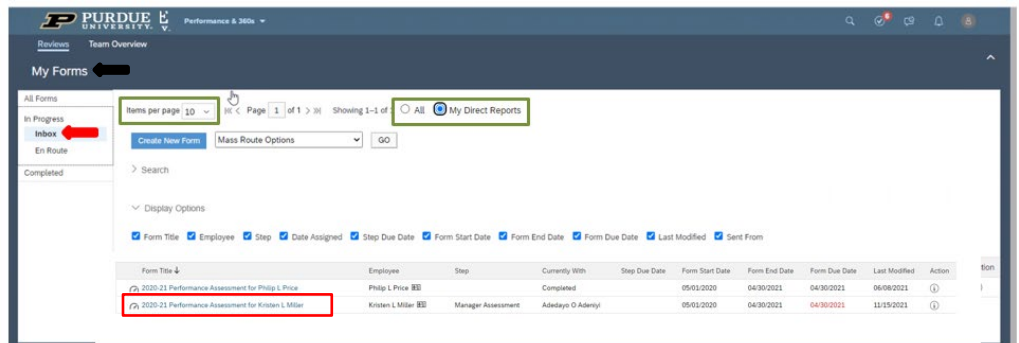
2. Access direct report's assessment form ([Click here to watch a short video](#))

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.



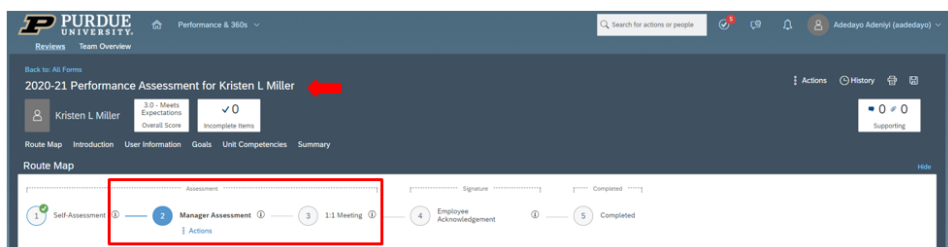
2. Once on the **My Forms** page, click 'Inbox' and the 'My Direct Reports' buttons when completing the annual evaluation process.

This will customize how assessments appear on your screen. If the supervisor has a large number of employees, click the 'Items per page' drop-down to increase the number of assessment appearing on the page.



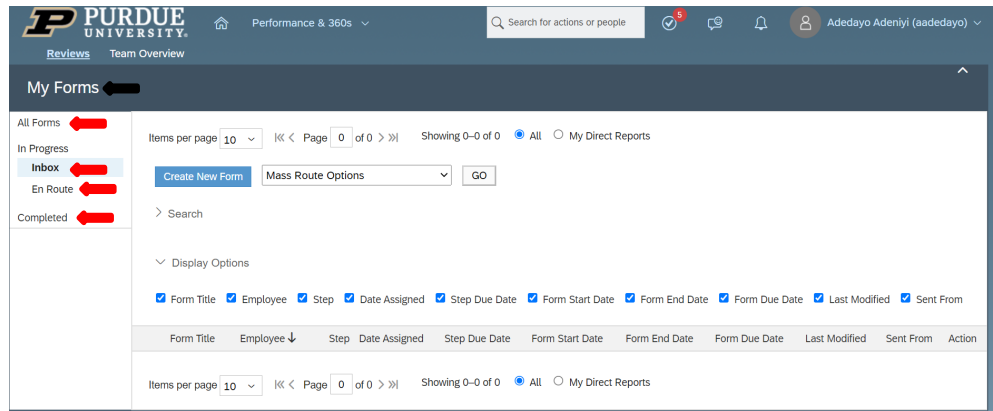
Next, scroll down to identify the specific performance assessment to open. Click the 'Form Title' name to open a specific form.

3. **Congratulations!** You have accessed a direct report's assessment form. You can now begin the work of completing the 'Manager 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/present assessment forms assigned to you.
- Click the **'Inbox'** to access assessment forms requiring the supervisor's action.
- Click the **'En Route'** tab to view assessment from requiring action of others.
- Click the **'Completed'** tab to access completed assessments appearing in your My Forms completed file.
- Click the **Team Overview** button to view assessment rating reports for current and past performance periods.



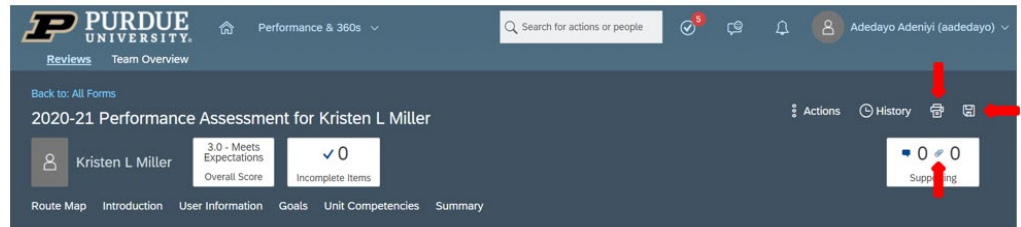
My Team	Self-Assessment	Manager Assessment	1:1 Meeting	Signatures
Happy	Select a rating... Select a rating... + 1 Other Ratings	2.83 2.83	2.83 2.83	<input type="checkbox"/>
Good	Select a rating... Select a rating... + 1 Other Ratings	3.0 3.0	3.0 3.0	<input checked="" type="checkbox"/>
Lucky	Select a rating... Select a rating... + 1 Other Ratings	4.19 4.19	4.19 4.19	<input type="checkbox"/>

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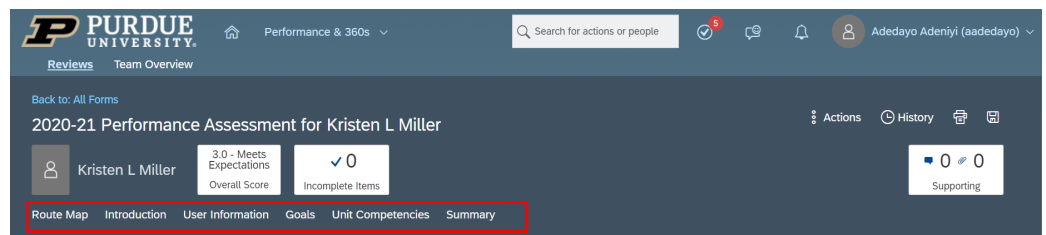
[\[Return to Top\]](#)

3. Understand the performance assessment form

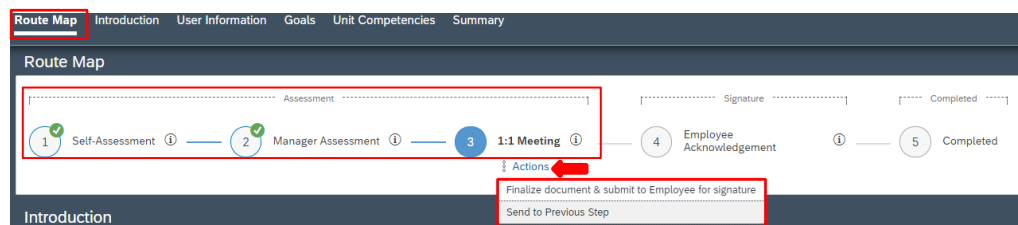
1. Become familiar with the 'Print', 'Save', and 'Attach Document' functionality appearing in the top right-side of the screen. [Attend a webinar](#) or visit PerformanceManagement@Purdue (videos) to learn more about these and other functions)



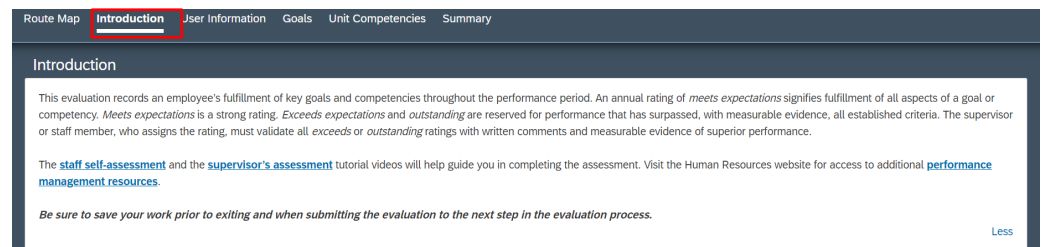
2. Become familiar with the six 'Navigation Tabs' on the top left-side of the screen. Use each tab (**Route Map, Introduction, User Information, Goals, Unit Competencies, and Summary**) to quickly access sections of the assessment form.



- Use 'Route Map' to identify the location of the assessment form. An 'Actions' link will appear throughout the 'Assessment' phases of the evaluation process. The 'Actions' link allows a supervisor to 'control the location of the assessment form'.



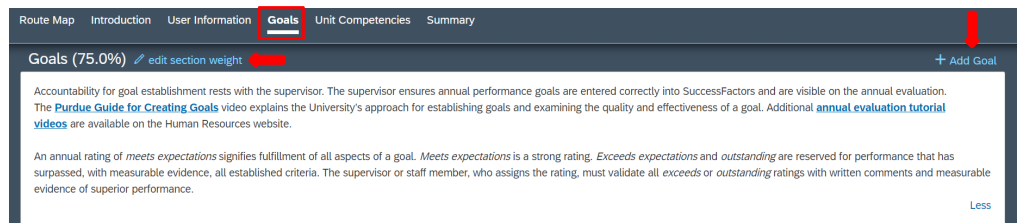
- Use 'Introduction' to view basic guidance for completing the evaluation and to access on-demand resources.



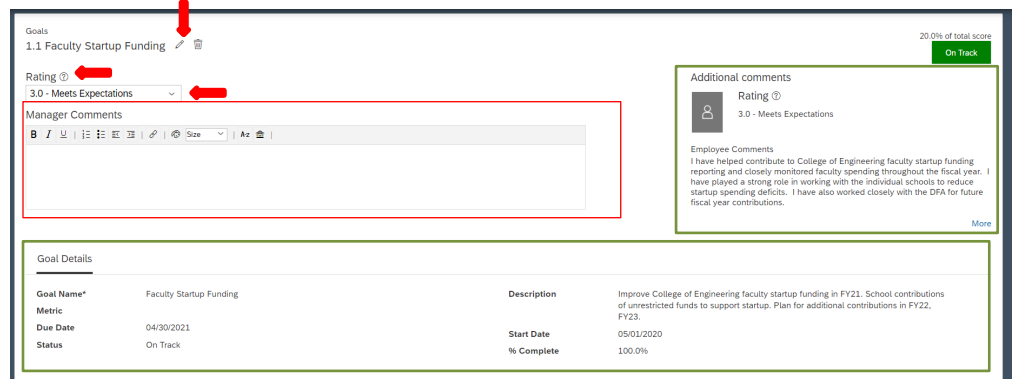
- Use 'User Information' tab to view relevant position data.



- Use 'Goals' to review HR guidance and access additional resources. Use the '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 to edit existing performance criteria. Use the 'Question Mark' to view rating scale. Use 'Rating Drop-down Menu' to enter a rating. Enter 'Management Comments' into the open field. View the 'Additional Comments' to read the direct report's self-assessment. View 'Goal Details' to review performance criteria.



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

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

The screenshot displays the 'Unit Competencies' section of the performance assessment tool. At the top, a navigation bar includes 'Route Map', 'Introduction', 'User Information', 'Goals', 'Unit Competencies' (highlighted), and 'Summary'. Below this, the 'Unit Competencies (25.0%)' section is shown with an 'edit section weight' link. A descriptive paragraph explains that competencies assess overall job performance, professional development, culture and values, and supervision expectations. A 'Less' link is visible at the bottom right of this section.

Four competency cards are listed, each with a title, a description, a 'Rating' dropdown menu, and an 'Employee Comments' text area with a 'Writing Assistant' button:

- Culture and Values:** Demonstrates ability to maintain positive relationships that enrich the University. Supports a culture of professionalism in alignment with unit values. Demonstrates cost-effectiveness, efficiency, transparency, and impactful work.
- Overall Job Performance:** Achieves performance standards and expectations (e.g. quality, quantity, and timeliness of work results). Decision making/problem solving, communications, customer service/service orientation, teamwork, continuous improvement/change management and other job related activities should be assessed as part of the overall job performance competency.
- Professional / Career Development:** The staff member has increased his/her knowledge and skills through on-going development activities and has demonstrated the ability to apply acquired knowledge and skills in the workplace. The appropriate short and long term goals are in place to support the employee's development.
- Supervision (Only rate supervisors against this competency):** The supervisor has clear, documented goals, metrics, and timelines for individual team members and the unit. The supervisor holds team members accountable for performance. The supervisor encourages staff through on-going performance feedback and professional development. The supervisor motivates staff to attain higher levels of performance and career aspirations.

- Use 'Summary' tab to view a snapshot of the supervisor assessment.

Route Map Introduction User Information Goals Unit Competencies **Summary**

Overall Form Rating: 3.0/5.0

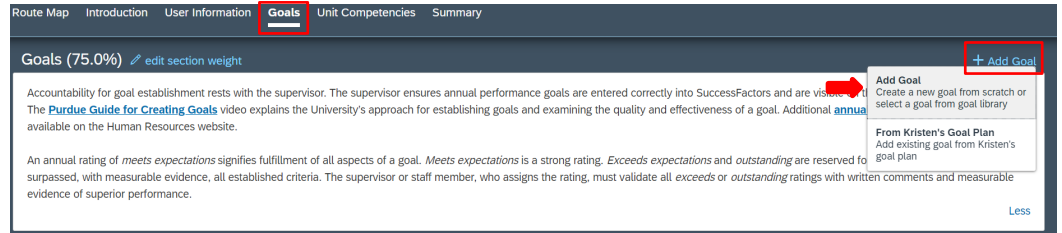
Name	Rating	Weight
Goals	3.0	75.0% of total score
Faculty Startup Funding	3.0 - Meets Expectations	20.0%
Business Area Surplus/Deficit	3.0 - Meets Expectations	30.0%
Financial Management Training	Select a rating...	15.0%
Business Area Cash Flow Projection	3.0 - Meets Expectations	10.0%
Training and Development	Select a rating...	10.0%
Fiscal Approver Delegation	Select a rating...	15.0%
Unit Competencies	Select a rating...	25.0% of total score
Culture and Values	Select a rating...	
Overall Job Performance	Select a rating...	
Professional / Career Development	Select a rating...	
Supervision (Only rate supervisors against this competency.)	Select a rating...	

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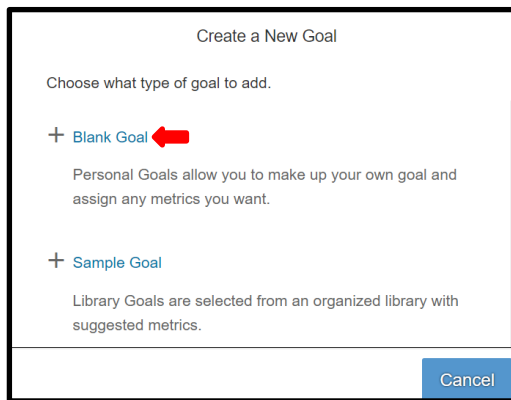
[\[Return to Top\]](#)

4. Add new goal(s) as appropriate

1. Click 'Goals' tab to navigate goals section. Next, click 'Add Goal' tab and select the 'Add Goal' option. A create 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.



TIP: By continuing this process, you will create a single goal for one employee. If the intent is to cascade a goal to a group, click cancel to end this process and watch the [Cascading Goals to Employees video](#) for guidance.

2. Supervisors are encouraged 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.

Fields marked with * are required.

Visibility:

* Goal Name*:

Description:

Metric:

* Weight: %

* Start Date:

* Due Date:

% Complete: %

Status:

Comments:

- Lastly, be sure to click the 'Save Changes' button after entering the goal criteria. 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 a direct report's goal plan. The goal will appear on the direct report's assessment form. Repeat the above process to add additional goals.

The screenshot shows a web interface for managing goals. The 'Goals' tab is active. A goal titled '1.1 Faculty Startup Funding' is displayed with a rating of '3.0 - Meets Expectations' and a status of 'On Track'. Below the goal name are metrics: Accuracy of Projections, Timeliness of Budget Preparations and Disbursements, and Quality of Guidance. A 'Manager Comments' section is present but empty. A 'Goal Details' table is shown at the bottom.

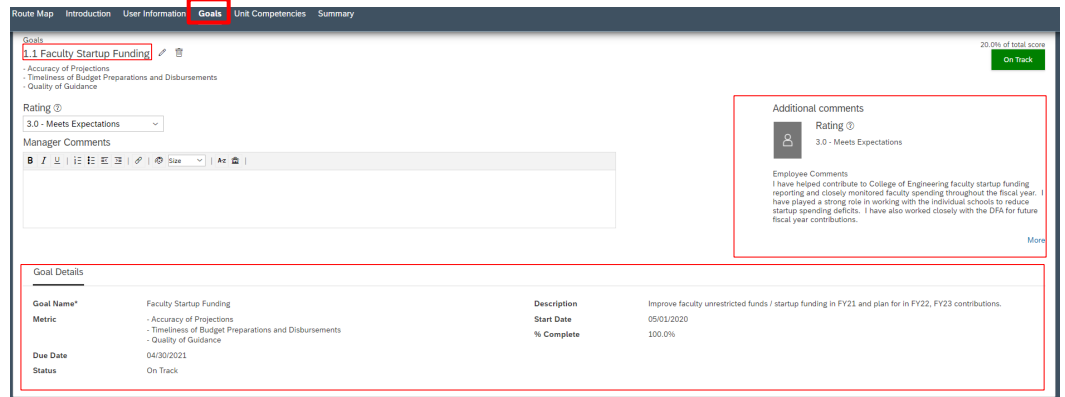
Goal Details			
Goal Name*	Faculty Startup Funding	Description	Improve faculty unrestricted funds / startup funding in FY21 and plan for in FY22, FY23 contributions.
Metric	- Accuracy of Projections - Timeliness of Budget Preparations and Disbursements - Quality of Guidance	Start Date	05/01/2020
Due Date	04/30/2021	% Complete	100.0%
Status	On Track		

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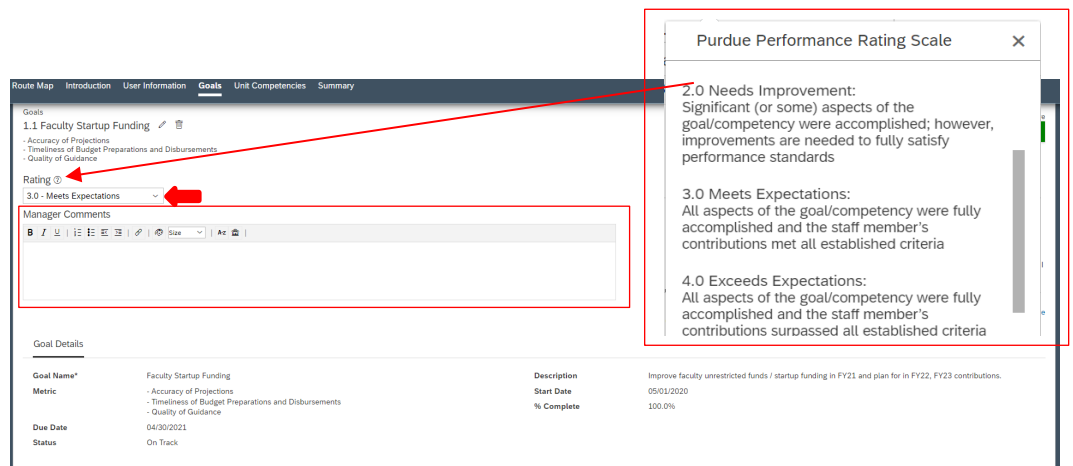
5. Enter goal ratings and comments (Click her to watch a short video)

1. Click 'Goals' tab and scroll down to the 'Goal Name' you wish to rate. Review 'Additional Comments' containing the employee's self-assessment. Review the 'Goal Details' containing the goal criteria.



2. Next, click the 'Question-mark' to view the rating scale. Then click the 'Drop-down Arrow' and select the appropriate rating. Lastly, enter 'Management Comments' to support the rating.

- Watch the [Purdue Guide for Rating Annual Performance](#) (5:00 minutes) and [Access HR Assessment Guidance](#) for additional support.



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

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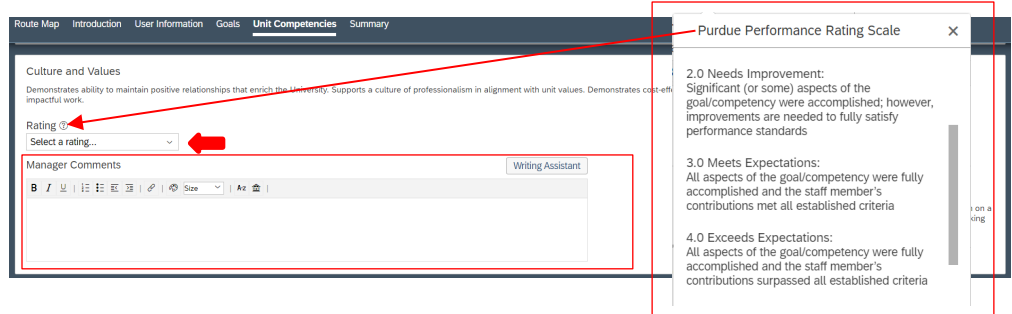
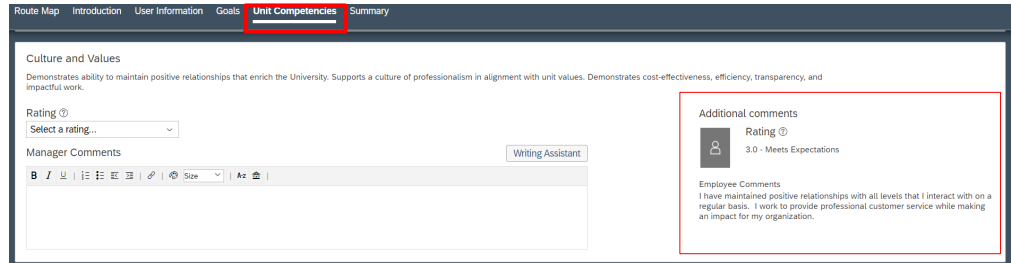
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6. Enter competency ratings and comments (Click here to watch a short video)

1. Click 'Unit Competencies' and scroll down to the name of the competency you would like to rate. Review 'Additional Comments' containing the employee's self-assessment.
 - Use the [Behavior Anchor Rating Scale](#) link to gain a deeper understanding of the four competencies

2. Next, click the 'Question-mark' to view the rating scale. Then click the 'Drop-down Arrow' and select the appropriate rating. Lastly, enter 'Manager Comments' to support the rating.
 - Watch the [Purdue Guide for Rating Annual Performance](#) (5:00 minutes) and Access [HR Assessment Guidance](#) for additional support.

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



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7. Send assessment-form to meeting step

1. Click **'Summary'** 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'**.
- 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.

Name	Rating	Weight
Goals	3.0	75.0% of total score ✓
Faculty Startup Funding	3.0 - Meets Expectations	20.0%
Business Area Surplus/Deficit	3.0 - Meets Expectations	30.0%
Financial Management Training	Select a rating...	15.0%
Business Area Cash Flow Projection	3.0 - Meets Expectations	10.0%
Training and Development	Select a rating...	10.0%
Fiscal Approver Delegation	Select a rating...	15.0%
Unit Competencies	Select a rating...	25.0% of total score ✓
Culture and Values	Select a rating...	
Overall Job Performance	Select a rating...	
Professional / Career Development	Select a rating...	
Supervision (Only rate supervisors against this competency)	Select a rating...	

2. Next, scroll to the bottom of the form and click **'Send to 1:1 Meeting Step'** and a new screen will appear.

- Once on the new screen click **'Send to 1:1 Meeting Step'** a second time and the **My Forms** page will appear.

3. **Congratulations!** You have sent the assessment form to the **'Meeting Step'** and the form appears in your **'Inbox'** for future action.

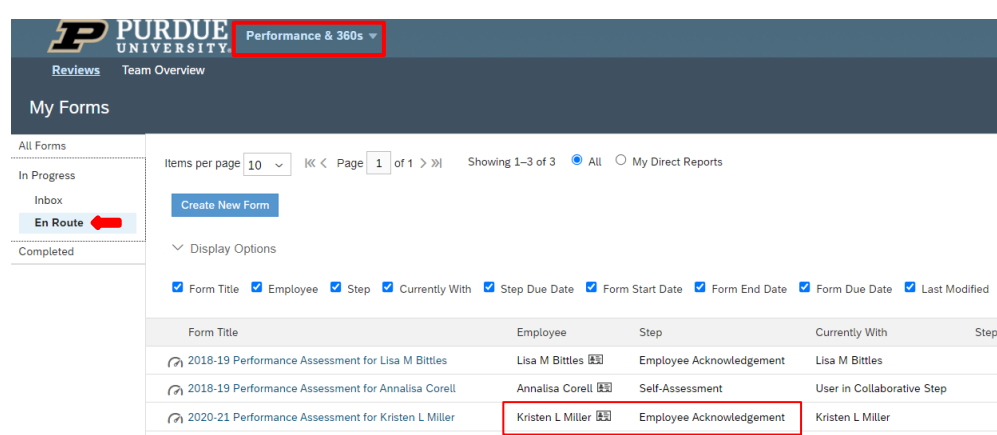
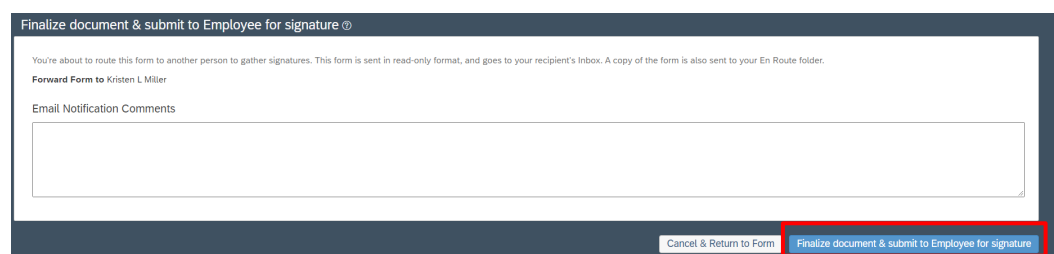
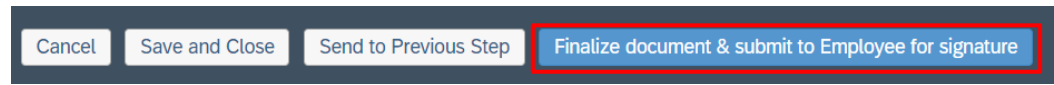
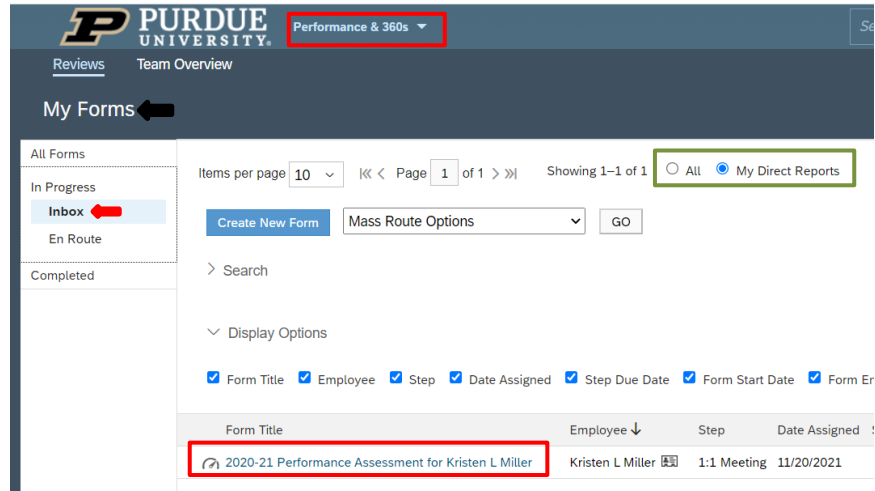
The first screenshot shows the bottom of the assessment form with buttons: Cancel, Save and Close, Send back to Employee for review, and **Send to 1:1 Meeting Step**.

The second screenshot is the 'Send to 1:1 Meeting Step' confirmation screen, with a **Send to 1:1 Meeting Step** button at the bottom right.

The third screenshot is the 'My Forms' page. The 'In Progress' tab is selected, and the 'Inbox' sub-tab is active. A form titled '2020-21 Performance Assessment for Kristen L Miller' is listed with a **1:1 Meeting** step due on 11/20/2021.

8. Send assessment-form to acknowledgment step ([Click here to watch a short video](#))

- Navigate back to the 'Performance & 360' My Forms page and click 'Inbox' and the 'My Direct Reports' button. This will customize which assessments appear at the bottom of your screen.
 - Next, scroll down your screen and identify which form to open and click the 'Form Title' name to open the form.
- After opening the assessment form, scroll to the very bottom of the form and click the 'Finalize document & submit to Employee for signature' button and a new screen will appear.
 - Once on the new screen, click the 'Finalize document & submit to Employee for signature' a second time and the 'Performance & 360s' page will re-appear.
- Congratulations!** You have successfully sent the form to the 'Employee Acknowledgment Step' and the assessment form was moved to the 'En Route' tab indicating the form is now in the direct report's inbox and awaiting action.



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9. Access reports

1. Navigate to the 'Performance and 360s' page and click the 'Team Overview' tab to view scoring reports for current and past performance periods. Use the 'Signature' column to track and encourage employees to complete and sign their performance assessments.

My Team	Self-Assessment	Manager Assessment	1:1 Meeting	Signatures
Happy	Select a rating... Select a rating... + 1 Other Ratings	2.83 2.83	2.83 2.83	<input type="checkbox"/>
Good	Select a rating... Select a rating... + 1 Other Ratings	3.0 3.0	3.0 3.0	<input checked="" type="checkbox"/>
Lucky	Select a rating... Select a rating... + 1 Other Ratings	4.19 4.19	4.19 4.19	<input type="checkbox"/>

2. Navigate to the SuccessFactors 'Home' page and scroll down to the 'Performance and Goals Management' section of the page. A supervisor can use these tiles to view Historic SAP Performance Forms and the status of current goals, development plans, and performance assessments. Watch the [SuccessFactors Report Tiles](#) video (4:59) for additional support

Performance Management

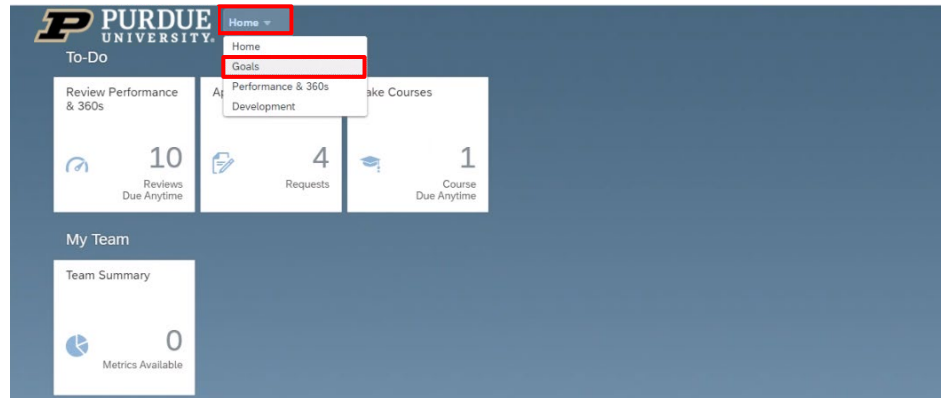
- Employee View Historic SAP Performance Forms
- Manager View Historic SAP Performance Forms
- Workforce Development Status: On Track
- Workforce Goal Status: On Track / Not Started
- Workforce Performance Status: 1:1 Meeting
- Staff Performance Status: 1:1 Meeting
- Staff Development Status: On Track
- Staff Goal Status: On Track / Not Started

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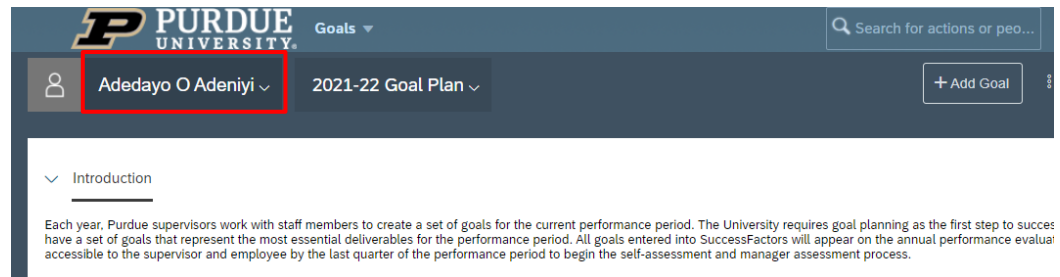
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10. Establish the future goal plan for a direct report

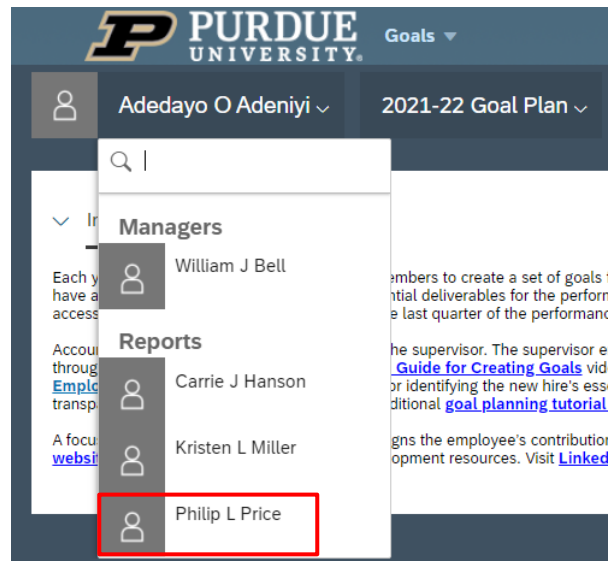
1. Navigate to the SuccessFactors landing-page. Click the 'Home' drop-down menu. Next, click the 'Goals' link to advance to your goal plan.



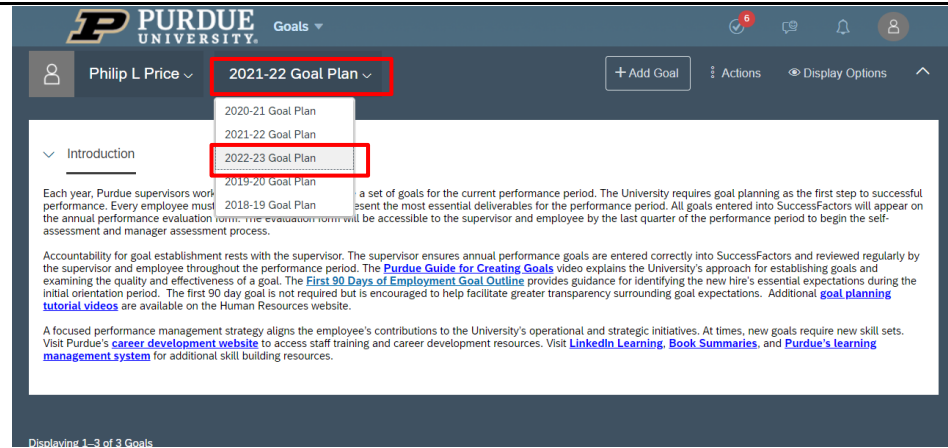
2. You are now in your goal plan. To navigate to your direct report's goal plan, click onto the 'Drop-Down Button' next to your name and the name(s) of your direct reports will appear.



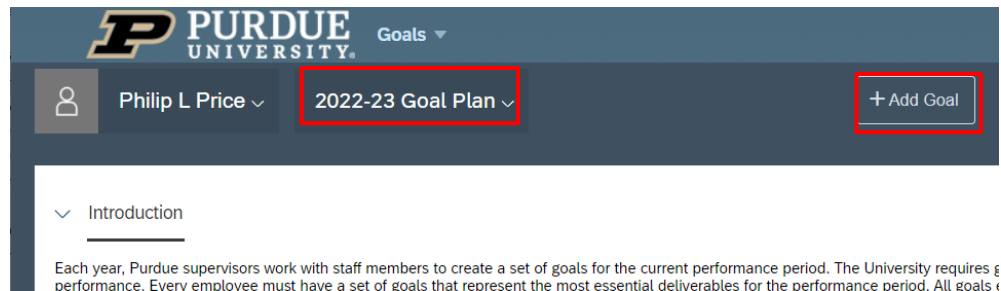
3. Next, click a 'Direct Report's Name' and their goal plan will appear.



4. Once in the report's goal plan, 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.



5. **Congratulations!** You have successfully navigated to your direct report's '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 9 of this quick reference guide or [watch this short video](#).



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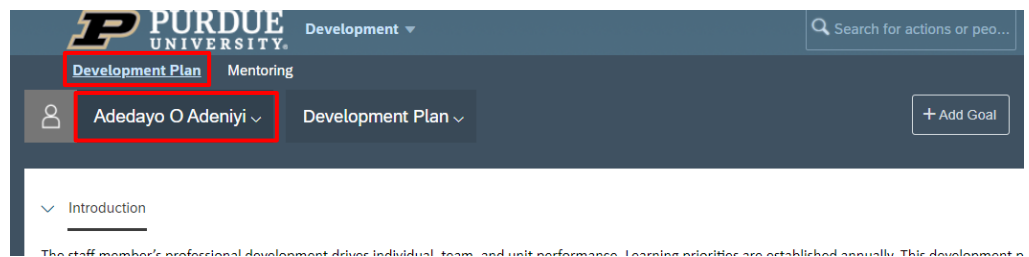
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11. Establish skills and career development goals for a direct report

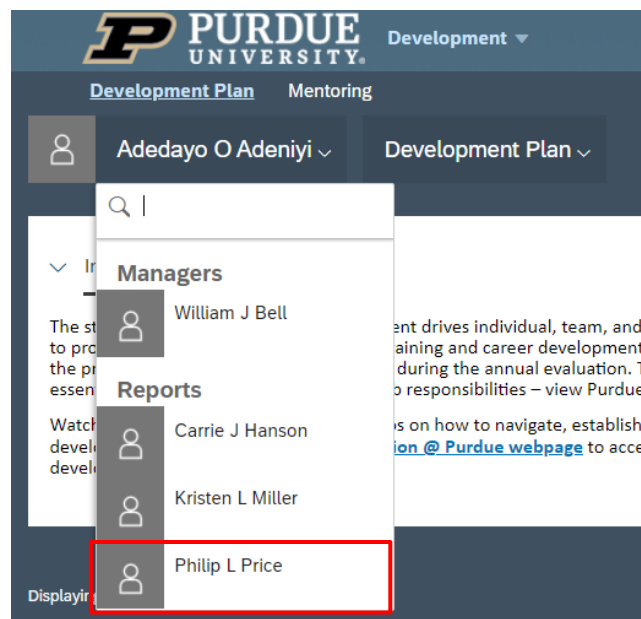
1. Navigate to the SuccessFactors landing-page. Click the 'Home' drop-down menu. Next, click the 'Development' link and advance to your development plan.



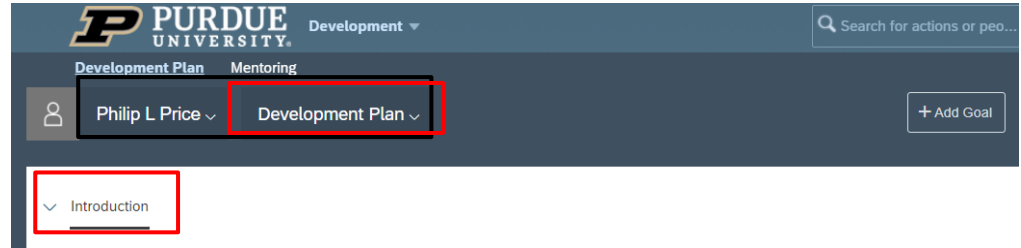
2. You are now in your 'Development Plan'. To navigate to your direct report's development plan, click onto the 'Drop-Down Button' next to your name and the name(s) of your direct reports will appear.



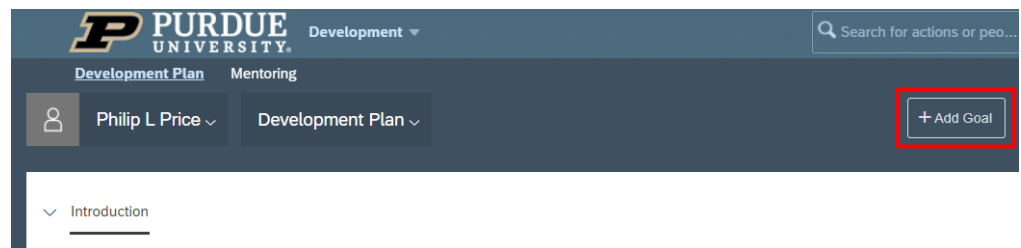
3. Click a 'Direct Report's Name' and their goal plan will appear.



4. You have successfully navigated to the **direct report's development plan**. Before advancing, click the **'Introduction Drop-Down Menu'** to access skills and career development resources available to Purdue employees and supervisors.



5. 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 on page 20 of this quick reference guide.



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

The screenshot shows the 'Development Plan' interface for Philip L. Price. It includes an introduction section and a table of development goals. The table has columns for Visibility, Goal Name, Description, End Date, Status, and Action. One goal is listed: '1.1 Take LinkedIn Learning Course for Remote Work' with a status of 'Not Started'.

Visibility	Goal Name	Description	End Date	Status	Action
Private	1.1 Take LinkedIn Learning Course for Remote Work	Take LinkedIn Learning course titled Working from Home	12/31/2022	Not Started	

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