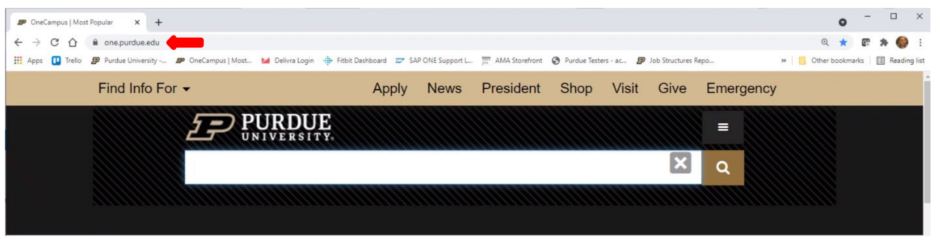
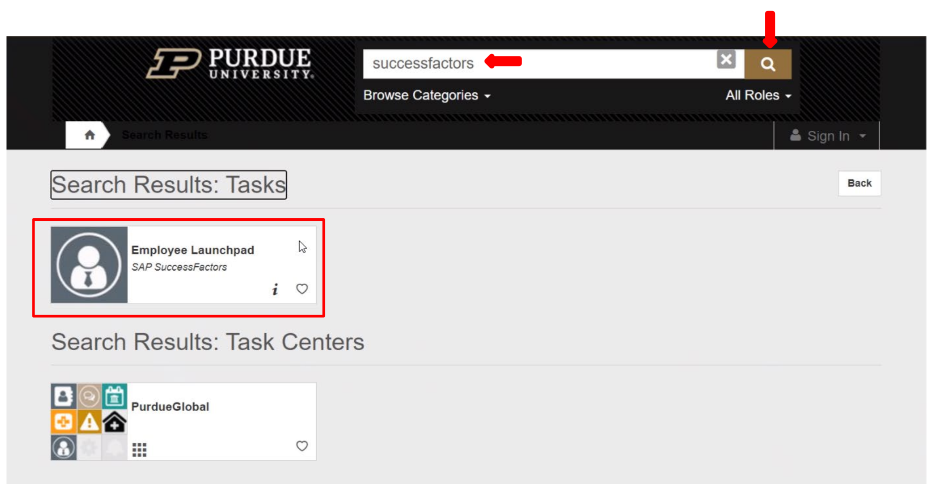
Contents

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

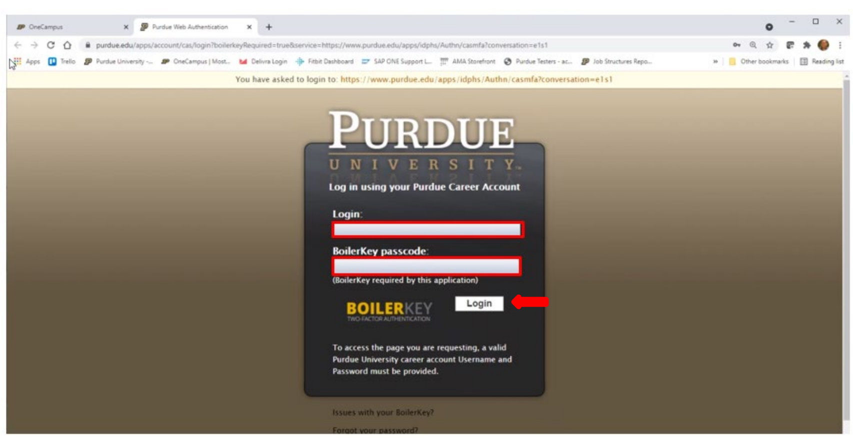
1. Enter https://one.purdue.edu/ into the browser.

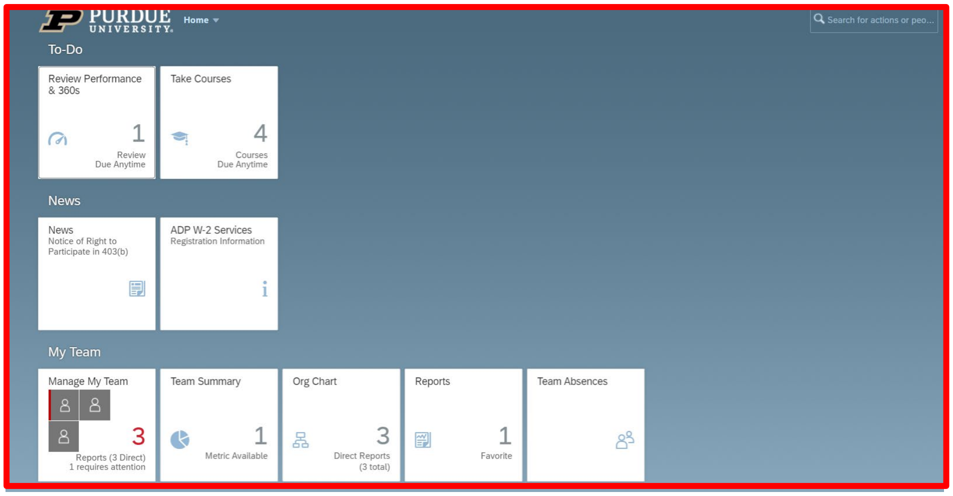


- Next, enter 'successfactors' into the search field, click the 'Search Icon', and scroll down to the ***Search Results:*** and click the 'Employee Launchpad' tile. A new screen will appear requesting the manager to enter their Purdue Career Account information.



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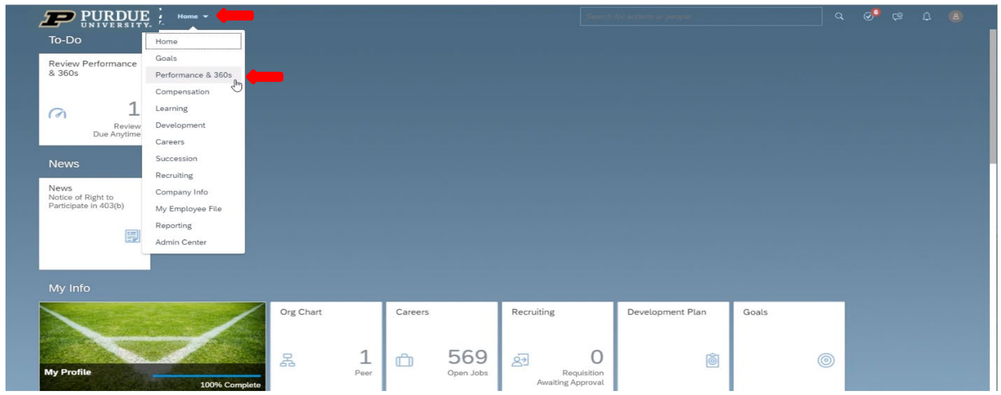
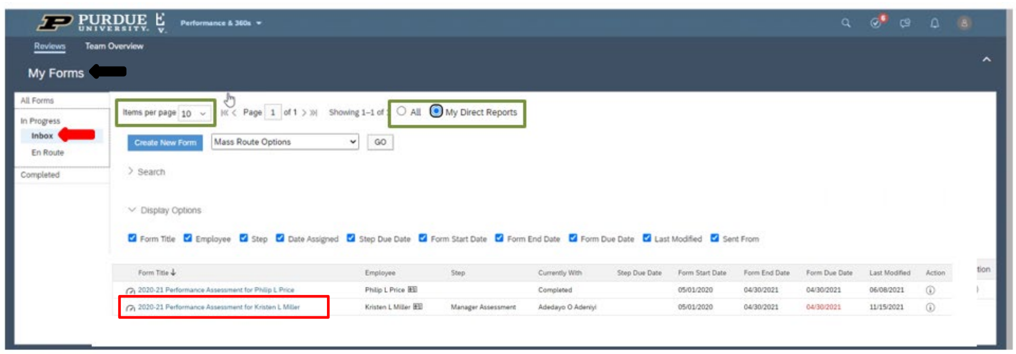
2. Access direct report's assessment form (Click here to watch a short video)

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.

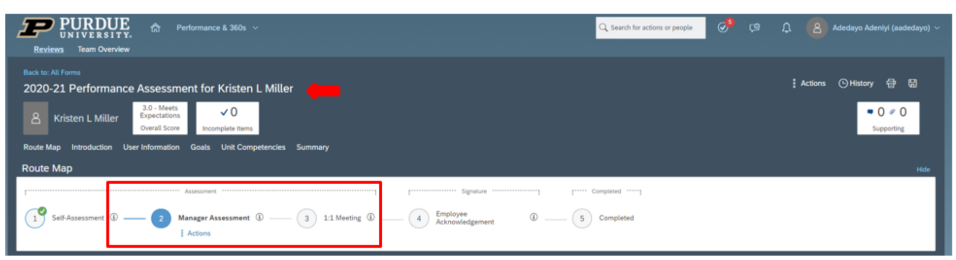


2. Once on the ***My Forms*** page, click 'Inbox' and the 'My Direct Reports' buttons when completing the annual evaluation process. This will customize how assessments appear on your screen. If the supervisor has a large number of employees, click the 'Items per page' drop-down to increase the number 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.

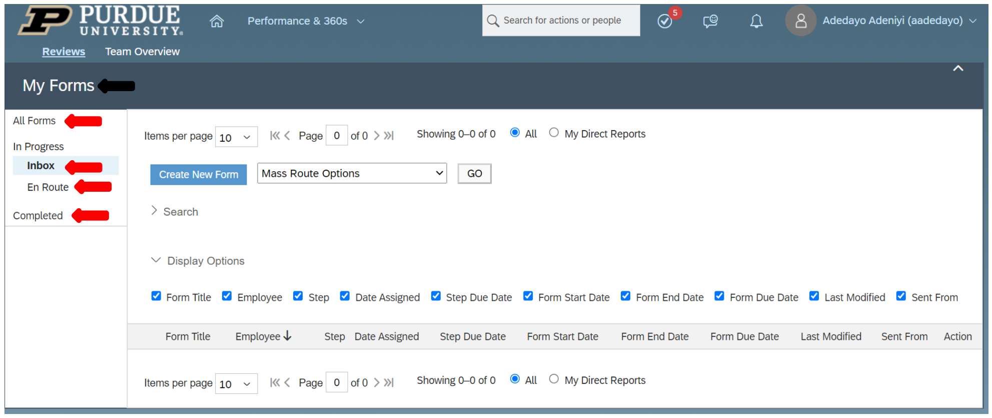


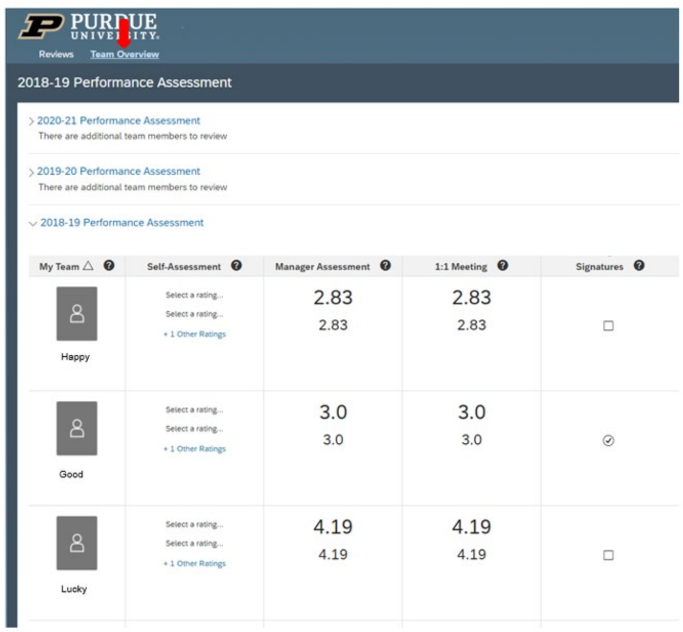
3. **Congratulations!** You have accessed a direct report's assessment form. You can now begin the work of completing the 'Manager Assessment'.



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.





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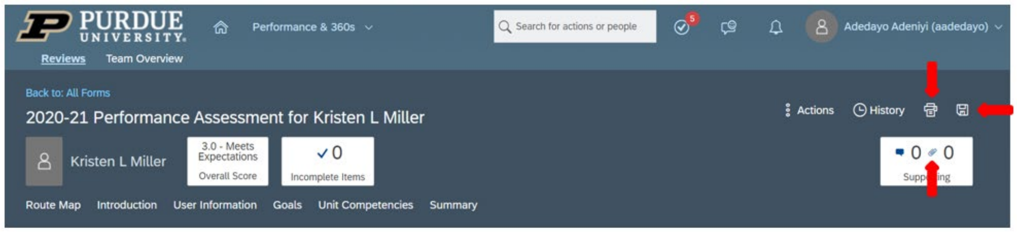
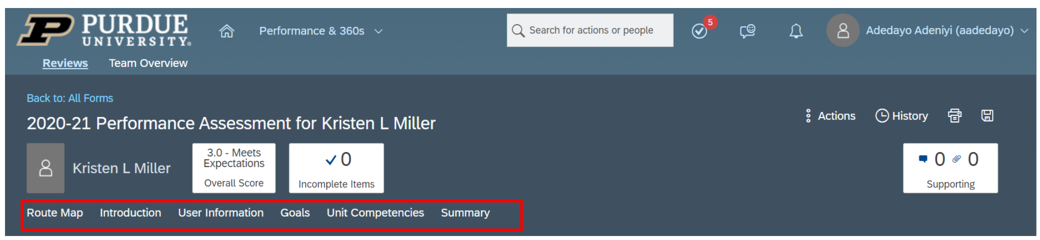
3. Understand the performance assessment form

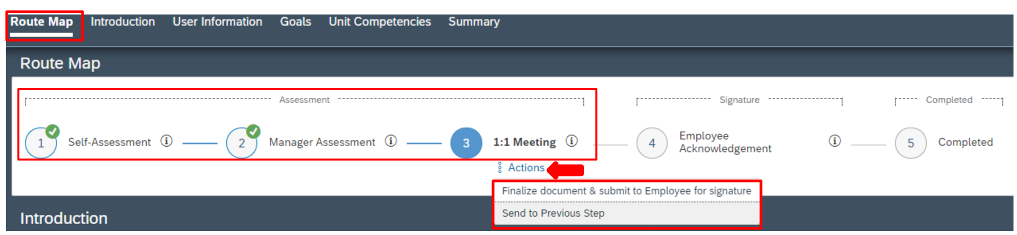
1. Become familiar with the 'Print', 'Save', and 'Attach Document' functionality appearing in the top right-side of the screen. Attend a webinar or visit Performance Management@Purdue (videos) to learn more about these and other functions)



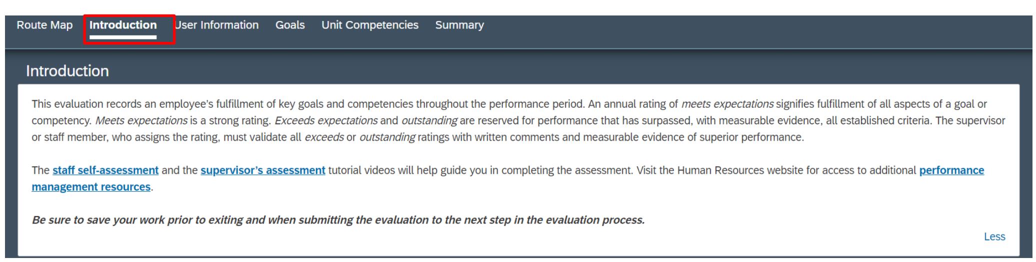
2. Become familiar with the six 'Navigation Tabs' on the top left-side the screen. Use each tab ***(Route Map, Introduction, User Information, Goals, Unit Competencies, and Summary)*** to quickly access sections of the assessment form.



- Use 'Route Map' 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'.

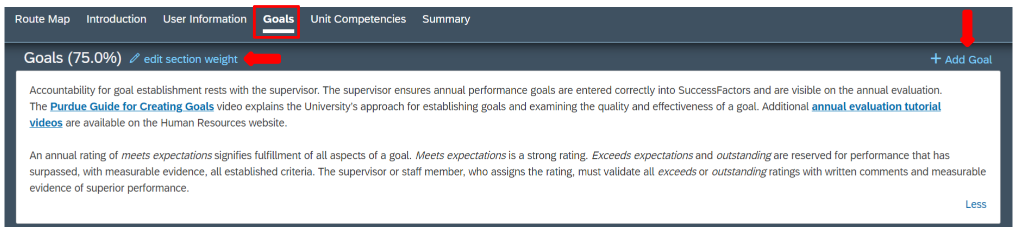


- Use 'Introduction' to view basic guidance for completing the evaluation and to access on-demand resources.

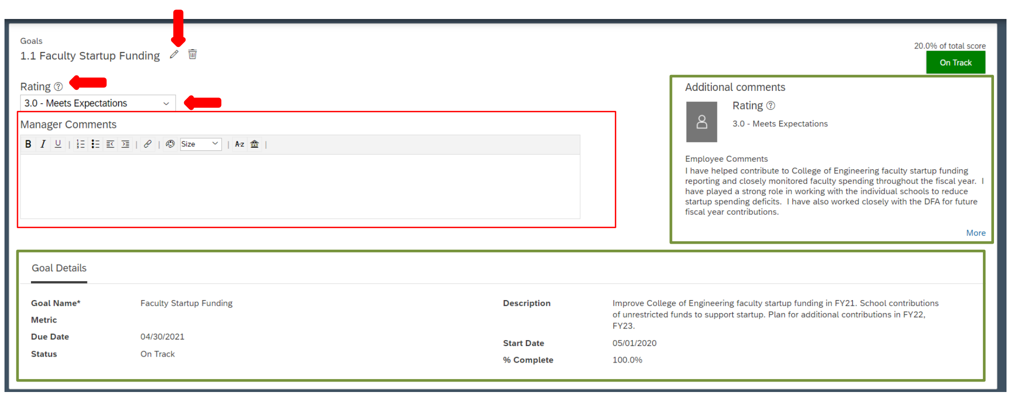


- Use 'User Information' tab to view relevant position data.

- 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.



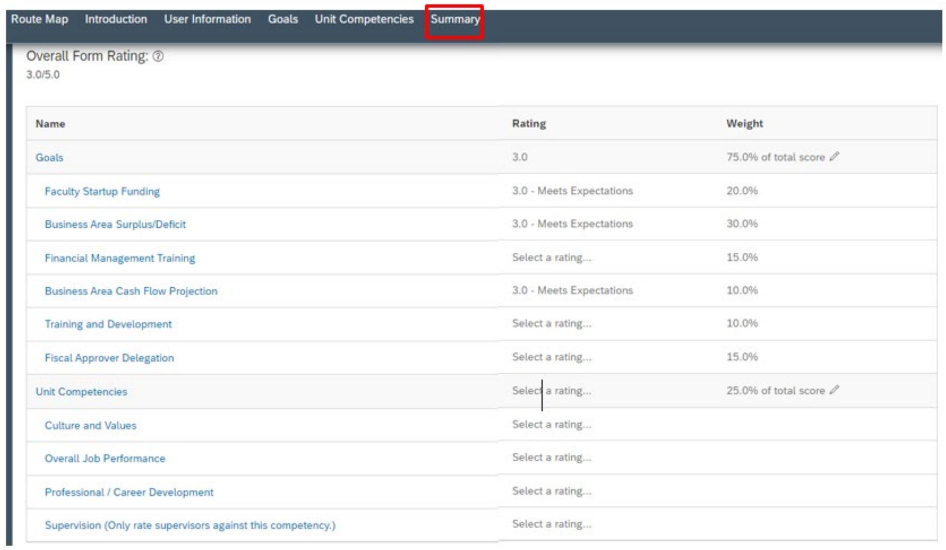
Use 'Pencil' icon to edit existing performance criteria. Use the 'Question Mark' to view rating scale. Use 'Rating Drop-down Menu' to enter a rating. Enter 'Management Comments' into the open field. View the 'Additional Comments' to read the direct report's self-assessment. View 'Goal Details' to review 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'***.

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



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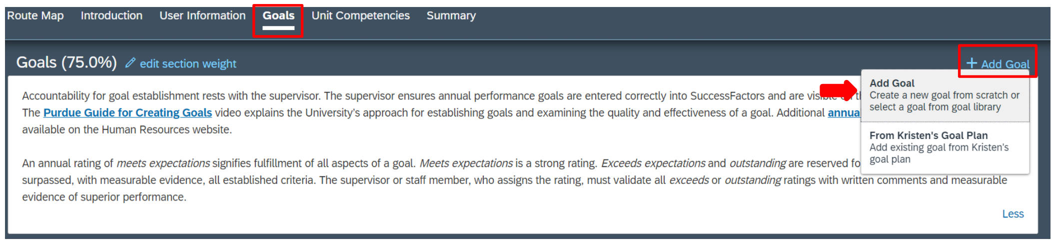
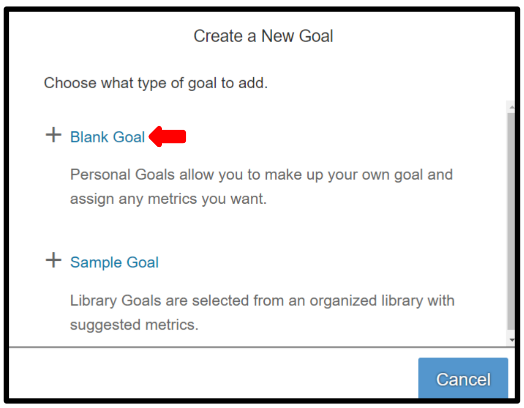
4. Add new goal(s) as approprate

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.



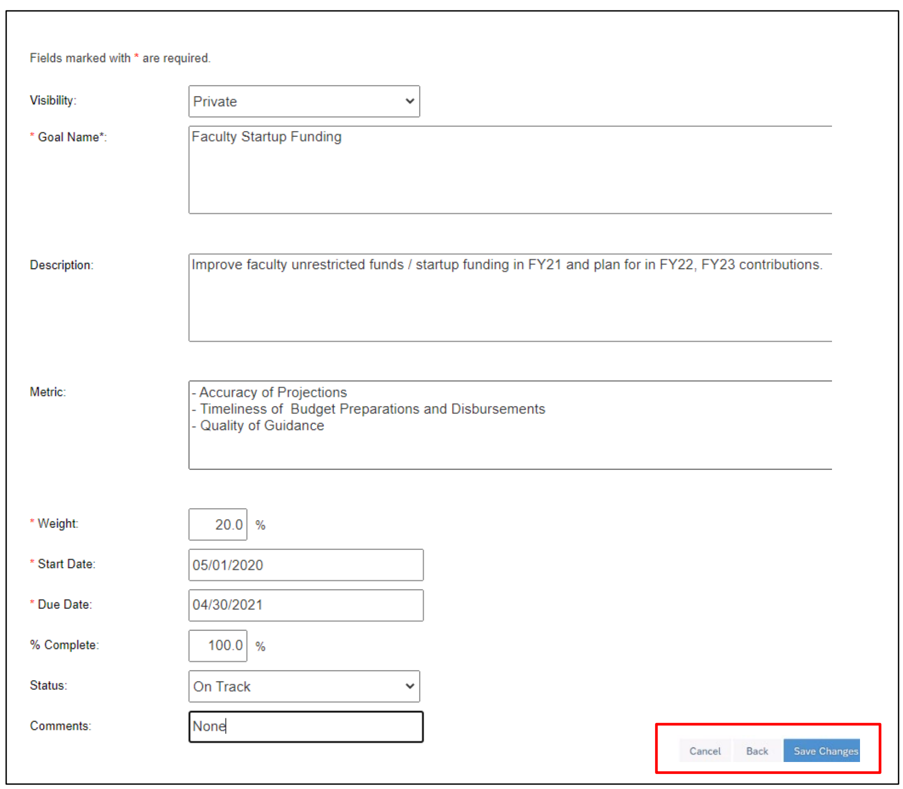
- Once on the Create a New Goal screen, click 'Blank Goal' and a new screen will appear allowing you to enter goal criteria.

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.

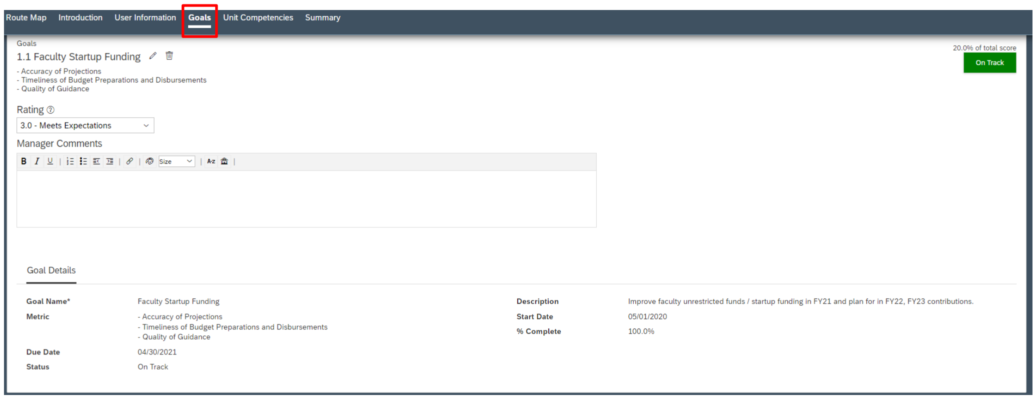


2. Supervisors are encouraged to enter criteria into all fields appearing on the goal plan. However, 'Goal Name', 'Weights', 'Start Date', and 'Due Date' are the only required fields.

- 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.



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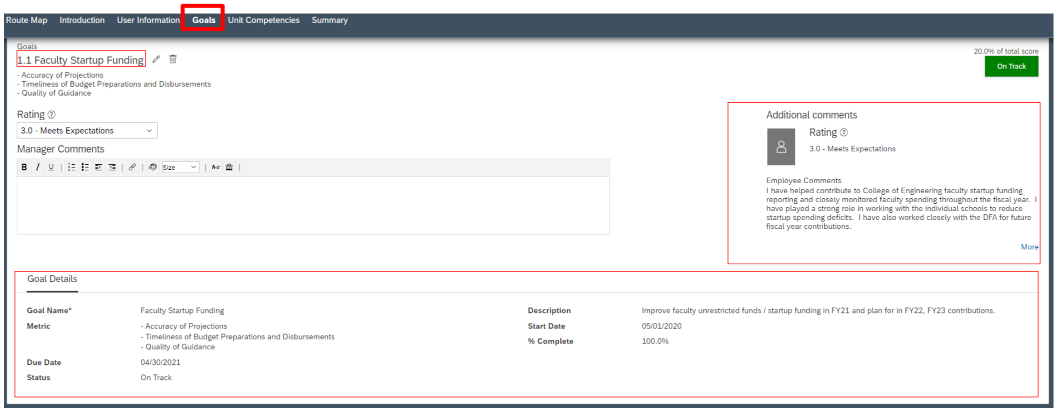
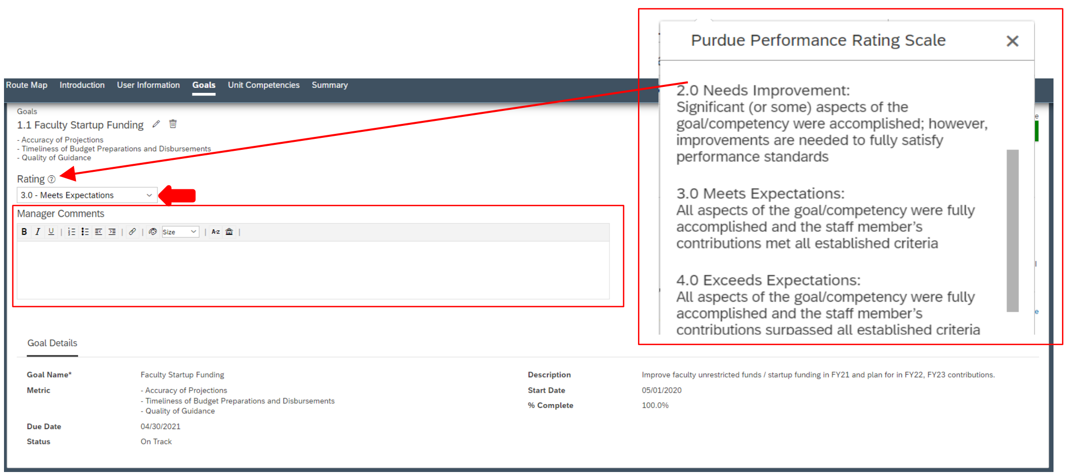
5. Enter goal ratings and comments (Click her to watch a short video)

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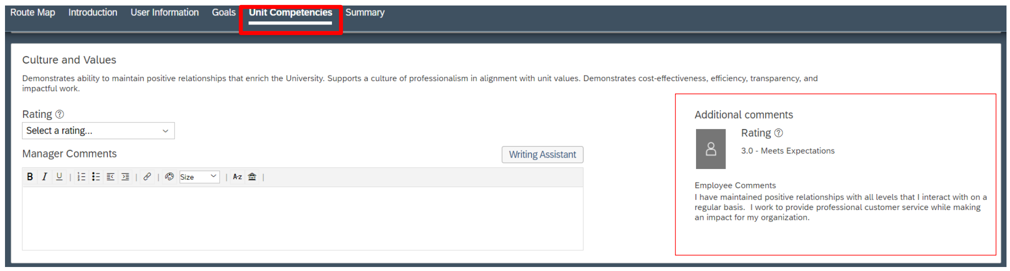
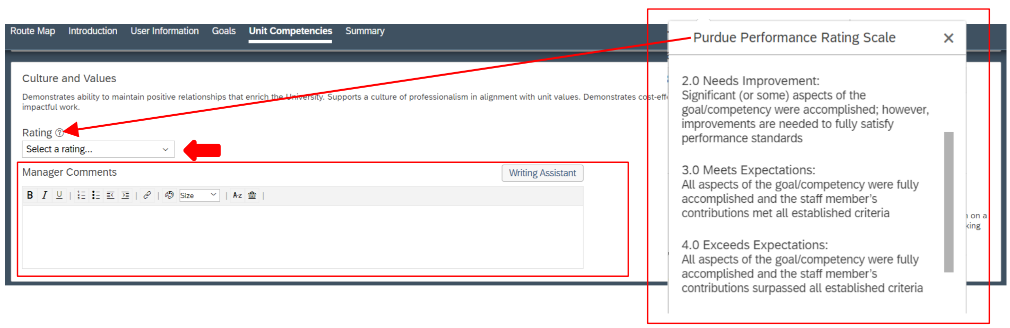
6. Enter competency ratings and comments (Click here to watch a short video)

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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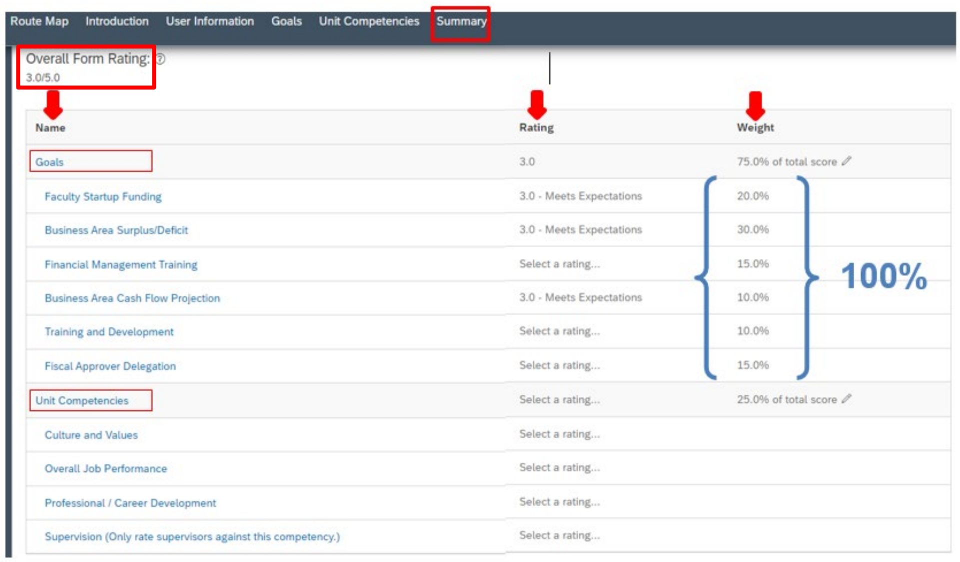
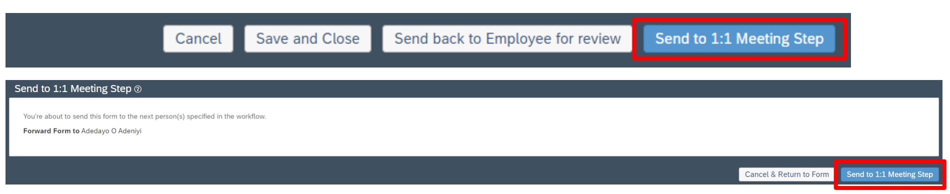
7. Send assessment-form to meeting step

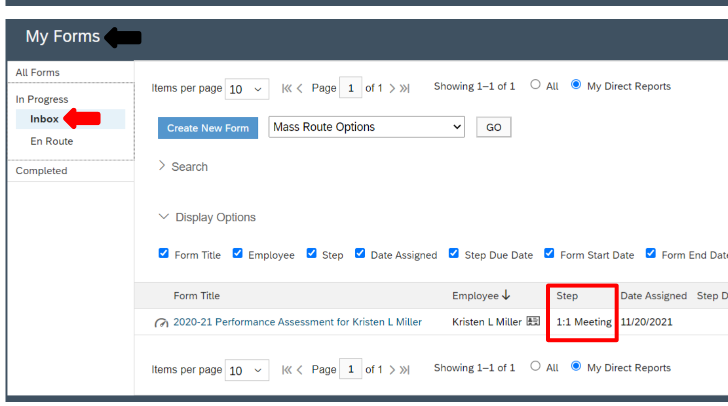
1. Click 'Summary' to view a snapshot of the supervisor's assessment.
   - Review the 'Overall Form Rating Score' which represents the combined average of the goal and unit competency scores.
   - Review the 'Goal' and 'Unit Competency' 'Ratings' and 'Weight'.
   - Add the goal weights together. ***A 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.



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.



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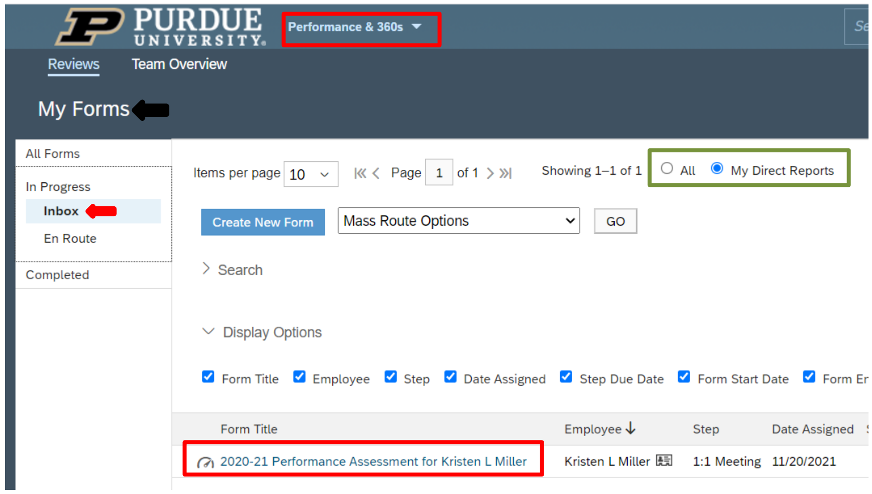
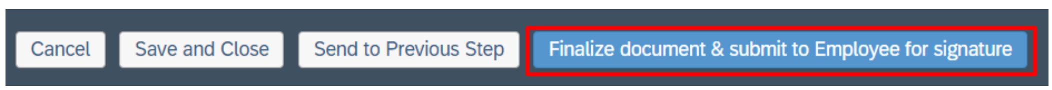
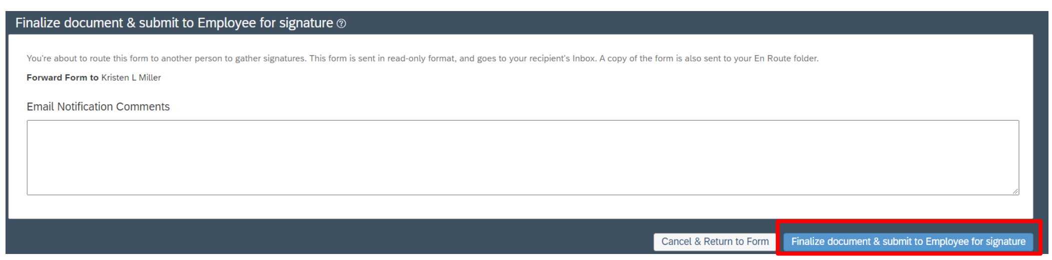
8. Send assessment-form to acknowledgment step (Click here to watch a short video)

1. 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.

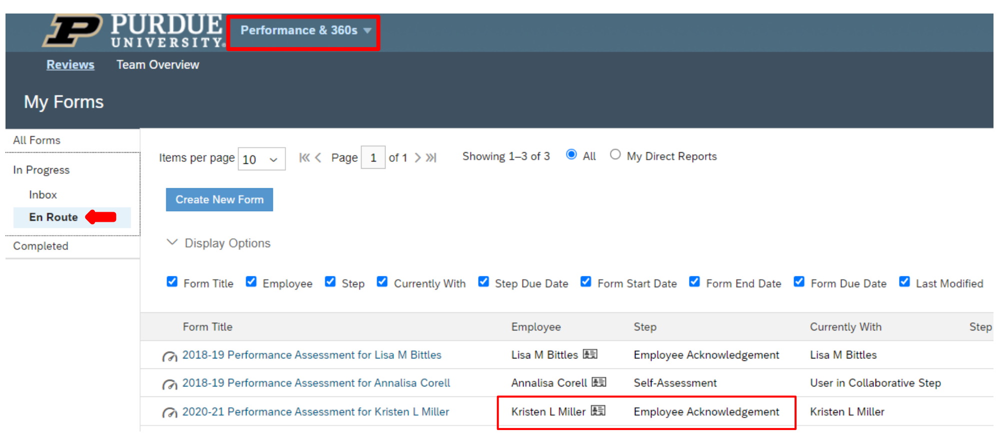


2. After opening the assessment form, scroll to the very bottom of the form and click the 'Finalize document & submit to Employee for signature' button and a new screen will appear.
   - Once on the new screen, click the 'Finalize document & submit to Employee for signature' a second time and the 'Performance & 360s' page will re-appear.





3. **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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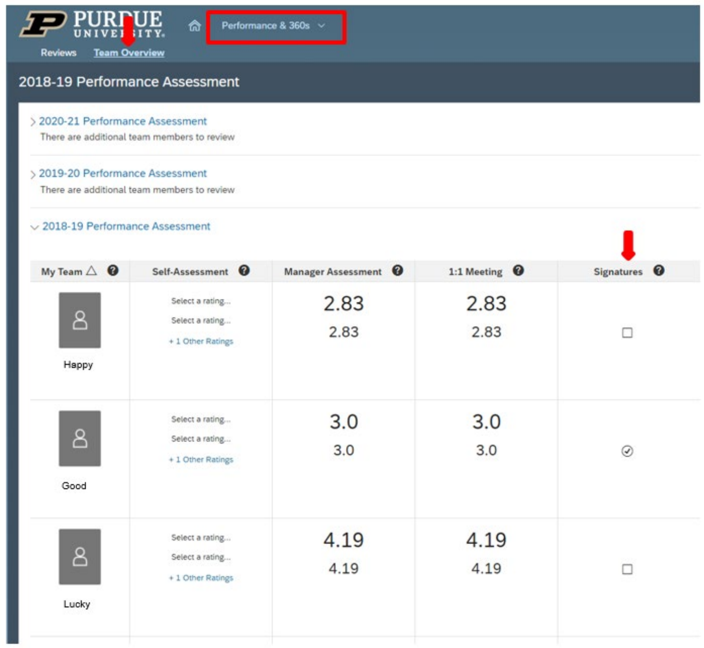
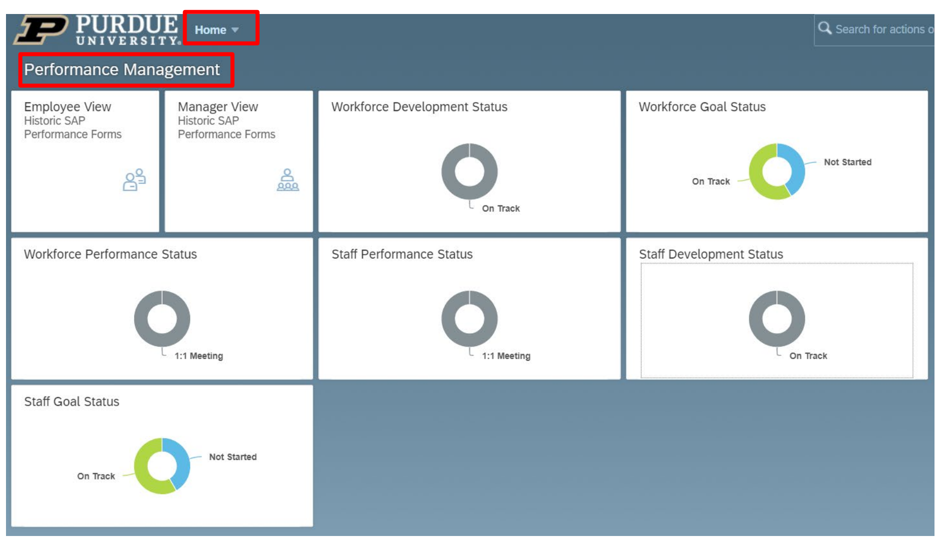
9. Access reports

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.



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



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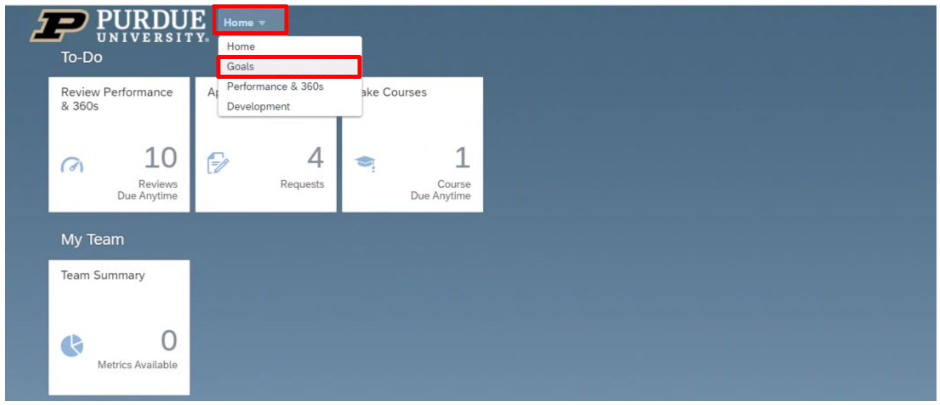
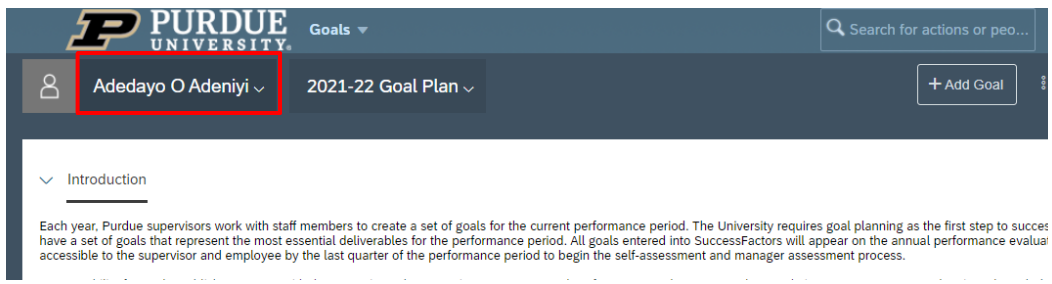
10. Establish the future goal plan for a direct report

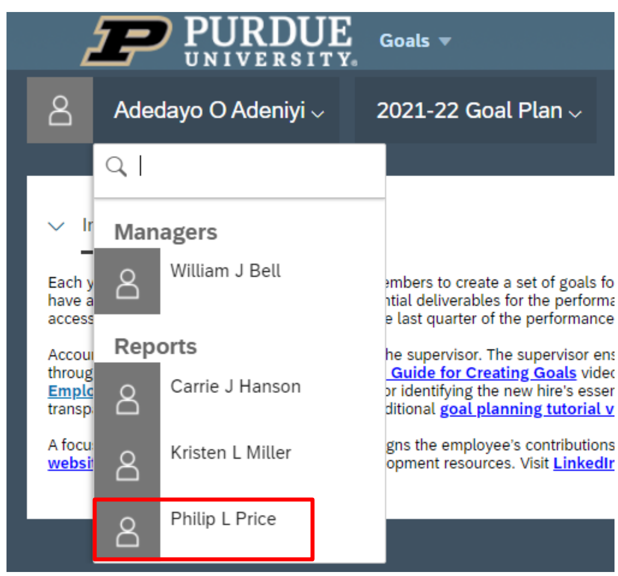
1. Navigate to the SuccessFactors landing-page. Click the 'Home' drop-down menu. Next, click the 'Goals' link to advance to your goal plan.



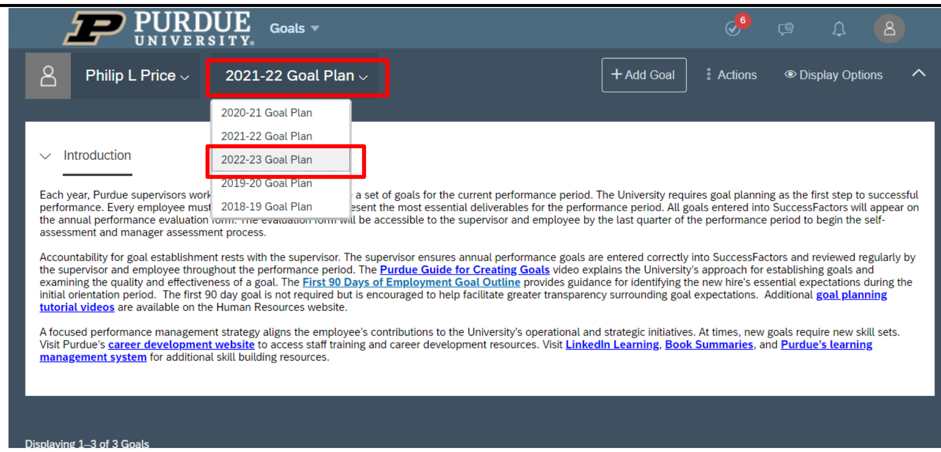
2. You are now in your goal plan. To navigate to your direct report's goal plan, click onto the 'Drop-Down Button' **next to your name** and the name(s) of your direct reports will appear.



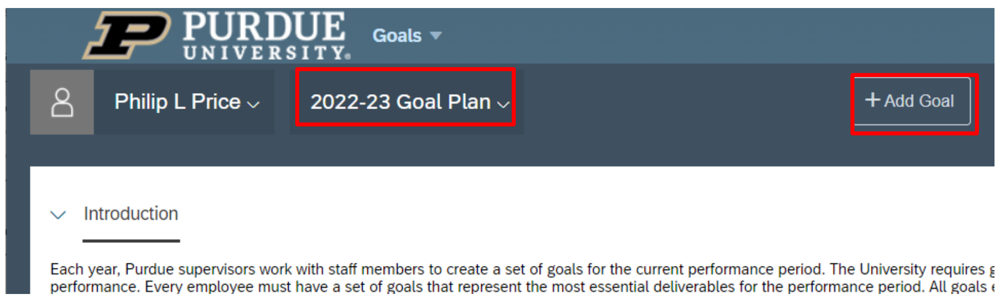
3. Next, click a 'Direct Report's Name' and their goal plan will appear.



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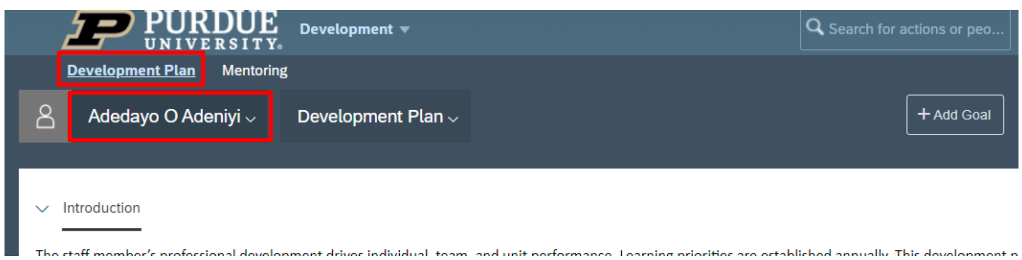
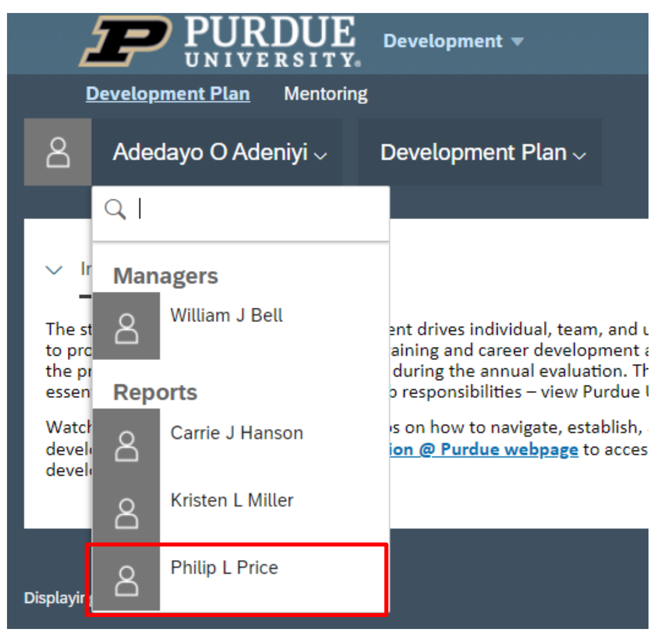
11. Establish skills and career development goals for a direct report

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

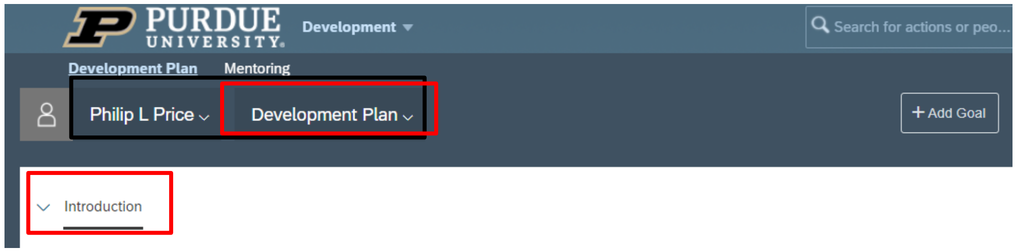
2. You are now in your 'Development Plan'. To navigate to your direct report's development plan, click onto the 'Drop-Down Button' **next to your name** and the name(s) of your direct reports will appear.



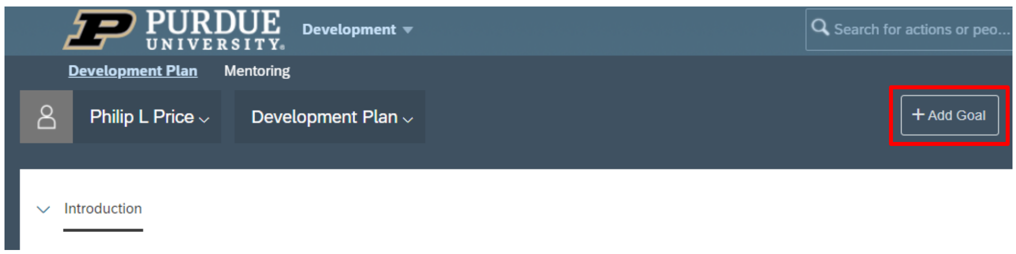
3. Click a 'Direct Report's Name' and their goal plan will appear.

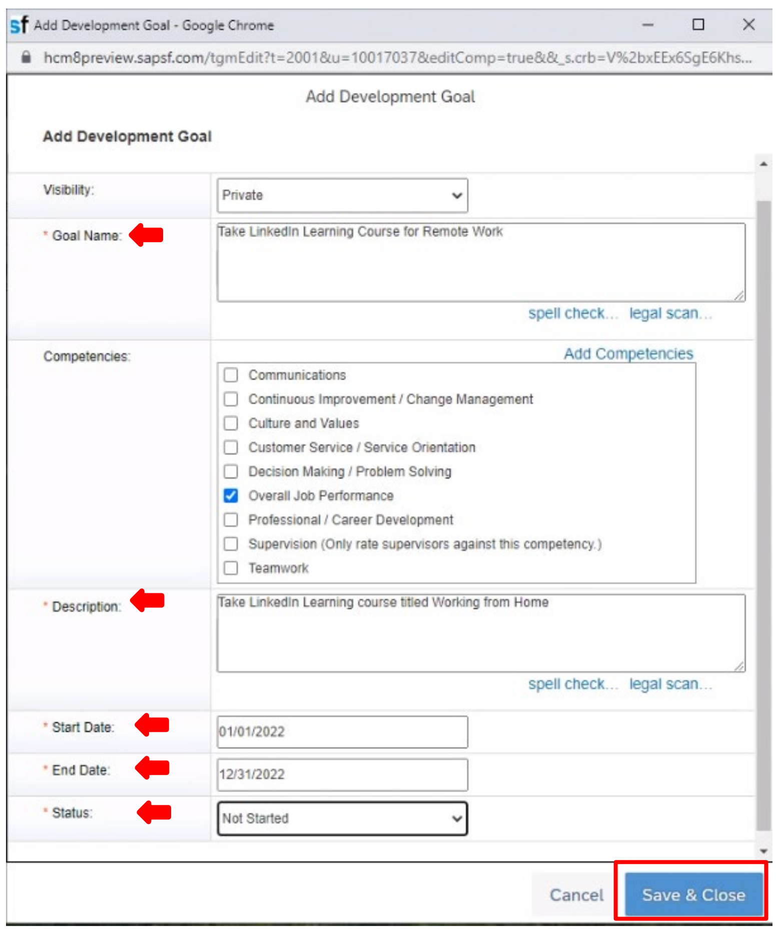


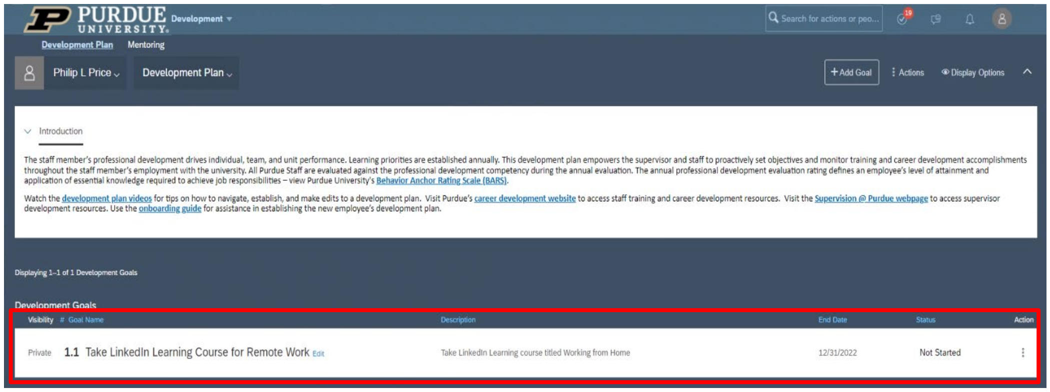
4. You have successfully navigated to the **direct report's development plan**. Before advancing, click the 'Introduction Drop-Down Menu' to access skills and career development resources available to Purdue employees and supervisors.



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.

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