

Quick Reference Guide

Goal Setting and Annual Performance Review for Supervisors – Last updated 2/21/19

This guide includes the steps to add and maintain goals throughout the performance plan year. It also documents the steps for managers in the annual performance review process.

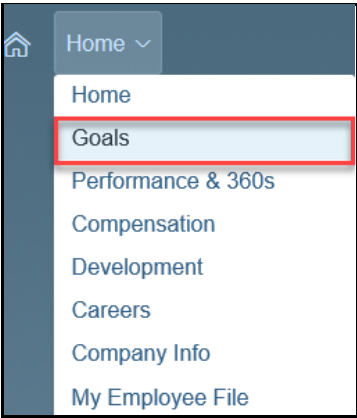
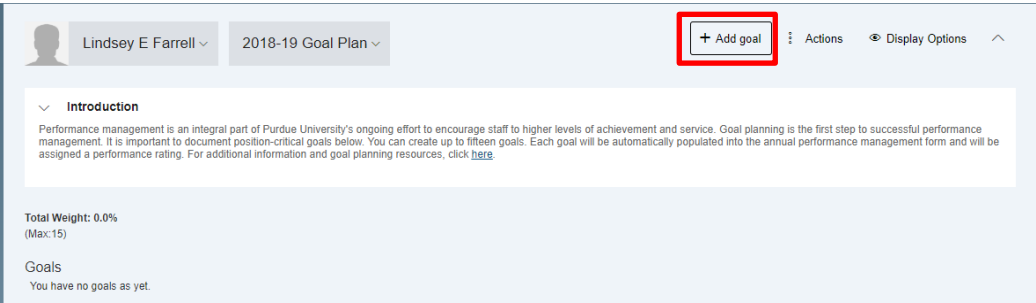
Hyperlinks:

[Intro to Accessing SuccessFactors](#)

[Intro to Goals Management](#)

[Intro to Cascading Goals \(Supervisors\)](#)

[Intro to Performance Assessment Annual Review \(Supervisors\)](#)

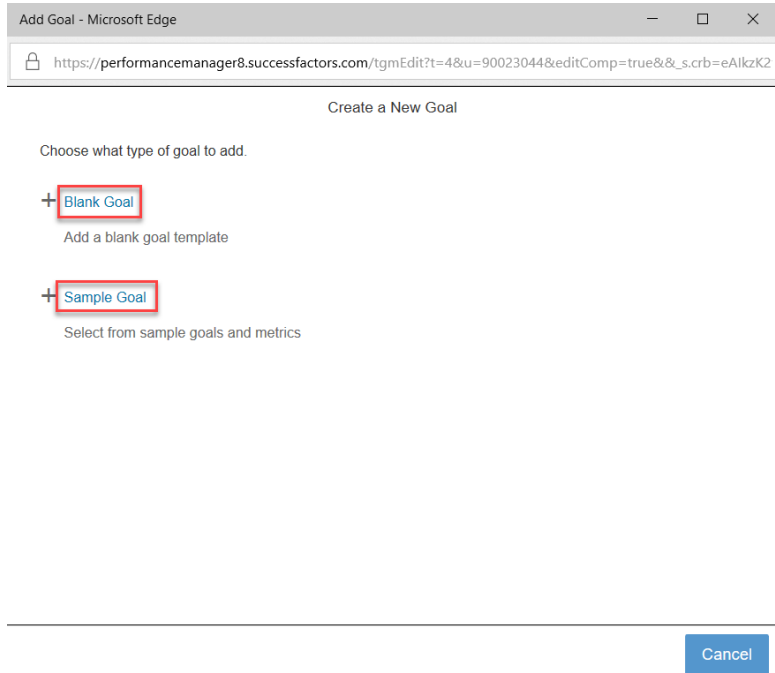
Access SuccessFactors	
Visit OneCampus (https://one.purdue.edu/) and select SuccessFactors . Log in using your Purdue User ID and Boiler Key passphrase.	
Add a New Goal	
<p>Click on Home Menu at top of screen and select Goals</p>	
<p>The Goals dashboard displays.</p> <p>Click Add Goal.</p>	

There are two options for adding a new goal.

Option 1 – Click **Blank Goal**.

Option 2 – Click **Sample Goal**.

The next two sections cover the steps for each option starting with a **Sample Goal**. This will help provide an understanding of the different components of a goal.



Add a Library Goal	
<p>Click the arrow (➤) to the left of one of the four Purdue overarching metric and measurement categories to view related goals.</p>	<div style="border: 1px solid black; padding: 10px;"> <div style="background-color: #1a3d4d; color: white; text-align: center; padding: 5px;">Select Goal from the Library</div> <p style="font-size: small; margin-top: 10px;">Select goal to add from the library. Click the icon to expand categories. You will be able to modify the goal in the next step.</p> <div style="border: 1px solid red; padding: 5px; margin: 10px 0;"> <ul style="list-style-type: none"> > Effectiveness and Efficiency Measures > Professional Development > Quality and Quantity Measures > Time Measures </div> <div style="text-align: right; margin-top: 10px;"> Cancel Back Add Selected </div> </div>
<p>Select one or more goals.</p> <p>In this example, we've select Effectiveness and Efficiency Measures.</p> <p>Click the right facing arrow > to expand the category.</p>	<div style="border: 1px solid black; padding: 10px;"> <div style="background-color: #1a3d4d; color: white; text-align: center; padding: 5px;">Select Goal from the Library</div> <p style="font-size: small; margin-top: 10px;">Select goal to add from the library. Click the icon to expand categories. You will be able to modify the goal in the next step.</p> <div style="border: 1px solid red; padding: 5px; margin: 10px 0;"> <ul style="list-style-type: none"> > Effectiveness and Efficiency Measures > Professional Development > Quality and Quantity Measures > Time Measures </div> <div style="text-align: right; margin-top: 10px;"> Cancel Back Add Selected </div> </div>

Goal Setting and Annual Performance Review for Supervisors

Select the individual goal of **Project Completion within Budget**.

Click **Add Selected**.

Select Goal from the Library

Select goal to add from the library. Click the icon to expand categories. You will be able to modify the goal in the next step.

- Compliance Rate __ compliance rate
- Cost Reduction \$__ reduction in __ costs
- Customer Satisfaction Score Customer satisfaction score
- Decrease Average Cost % decrease in cost per __
- Error Rate Reduction __ error rate
- Project Completion within Budget** % of __ projects completed within budget
- Rate Reduction __ rate

Cancel Back **Add Selected**

The new goal is auto-populated with the **Goal Name** (required), **Description**, and **Metric**.

Visibility defaults to *Private*. This means that the goal is only visible to the employee, their supervisor, and any supervisors up the line of supervision.

Public goals are visible the employee, their peers, their supervisor, and any other individuals up and down the line of supervision.

Edit the sample goal defaults to meet your needs and those of your unit.

Spell check and legal scan are available.

Add Goal

Edit your goal below.

Fields marked with * are required.

Visibility: Private

* Goal Name: Project Completion within Budget

Description: Complete 100% of __ projects within budget for (time frame)

Metric: % of __ projects completed within budget

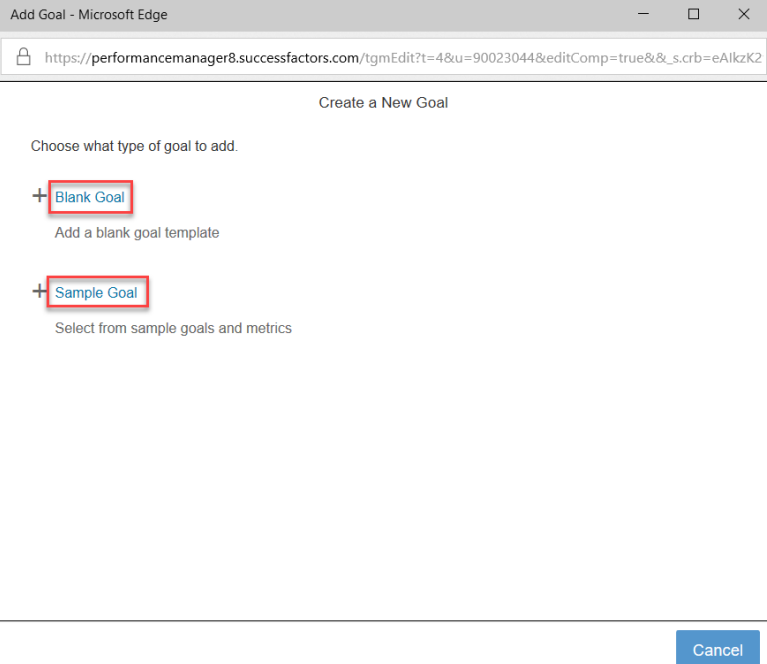


Cancel Back **Save Changes**

Scroll down to enter the percentage of **Weight** (required) this goal carries toward the total weight of 100% for all goals established for the performance plan year.

* Weight: 20.0 %

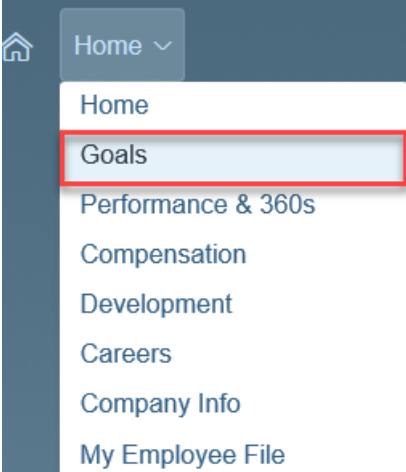

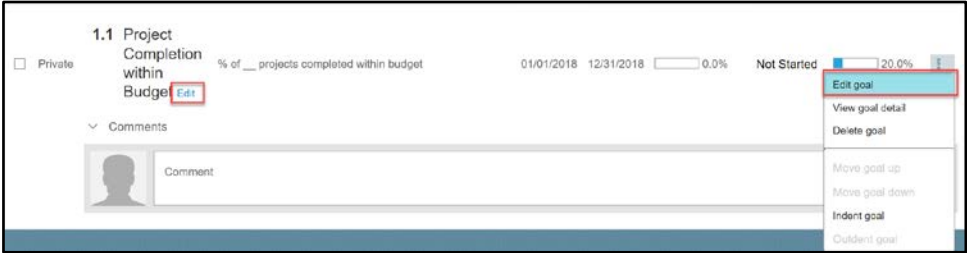
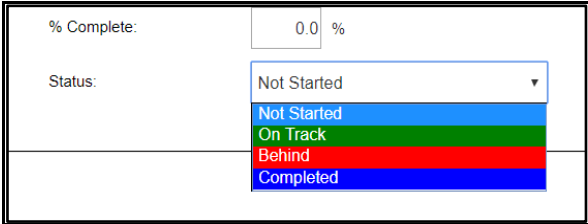
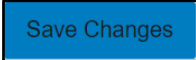
Goal Setting and Annual Performance Review for Supervisors

<p>(Note: Weighting for all goals must equal 100% at the time of the annual performance review.)</p>	
<p>Scroll down to enter the Start Date (required) and End Date (required).</p>	<div style="border: 2px solid black; padding: 5px;"> <p>* Start Date: <input type="text" value="01/01/2018"/></p> <p>* Due Date: <input type="text" value="12/31/2018"/></p> </div>
<p>Continue to scroll down to enter the % Complete and Status.</p>	<div style="border: 2px solid black; padding: 5px;"> <p>% Complete: <input type="text" value="0.0"/> %</p> <p>Status: <input style="border: 1px solid blue;" type="text" value="Not Started"/> <ul style="list-style-type: none"> <li style="background-color: #0000FF; color: white; padding: 2px;">Not Started <li style="background-color: #008000; color: white; padding: 2px;">On Track <li style="background-color: #FF0000; color: white; padding: 2px;">Behind <li style="background-color: #0000FF; color: white; padding: 2px;">Completed </p> </div>
<p>Click Save Changes.</p>	<div style="text-align: center;"> <input style="background-color: #0000FF; color: white; padding: 5px 15px; border: none;" type="button" value="Save Changes"/> </div>

Add a Blank Goal	
<p>Next, click Blank Goal.</p>	
<p>The upper portion of the new goal contains the Goal Name, a Description, and Metric; all three of these fields appear blank.</p> <p>Enter a Goal Name (required) and a Description and Metric (optional).</p> <p>Spell check and legal scan are available. The legal scan flags potentially problematic language.</p>	
<p>Scroll down to enter the percentage of Weight (required) this goal carries toward the total weight of 100% for all goals established for the performance plan year.</p> <p>(<i>Note:</i> Weighting for all goals must equal 100% at the time of the annual performance review.)</p>	

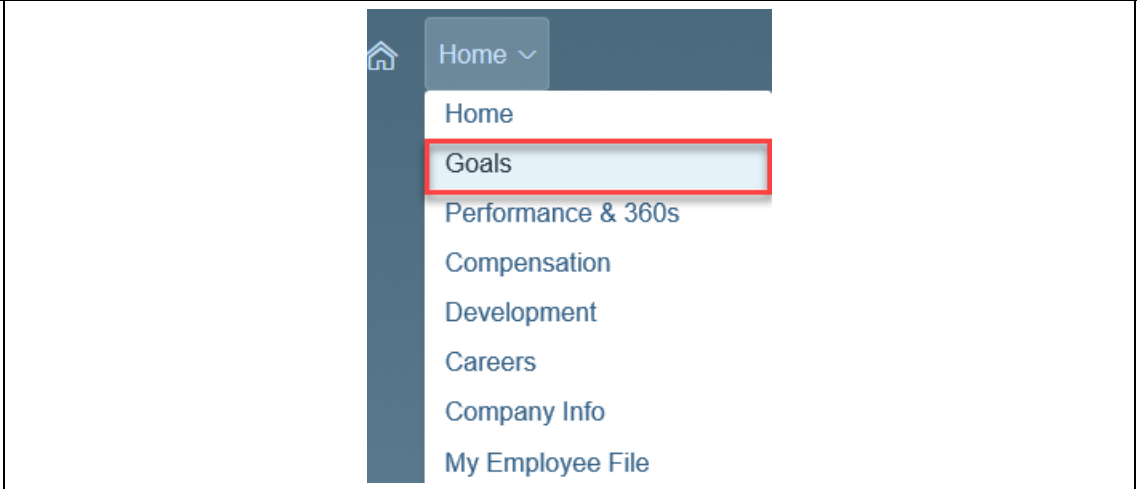
Goal Setting and Annual Performance Review for Supervisors

<p>Scroll down to enter the Start Date (required) and End Date (required).</p>	<div style="border: 1px solid black; padding: 5px;"> <p>* Start Date: <input type="text" value="01/01/2018"/></p> <p>* Due Date: <input type="text" value="12/31/2018"/></p> </div>
<p>Scroll down to enter the % Complete and Status.</p>	<div style="border: 1px solid black; padding: 5px;"> <p>% Complete: <input type="text" value="0.0"/> %</p> <p>Status: Not Started</p> <ul style="list-style-type: none"> <li style="background-color: #007bff; color: white; padding: 2px;">Not Started <li style="background-color: #28a745; color: white; padding: 2px;">On Track <li style="background-color: #dc3545; color: white; padding: 2px;">Behind <li style="background-color: #007bff; color: white; padding: 2px;">Completed </div>
<p>Lastly, scroll down to select University Initiatives (optional).</p> <p><i>(Note: When a Sample Goal is added, the University Initiatives do not display, however, they can be viewed when editing a Library Goal.)</i></p>	<div style="border: 1px solid black; padding: 5px;"> <p style="border: 1px solid red; padding: 2px;">University Initiatives (optional):</p> <ul style="list-style-type: none"> <input type="checkbox"/> Affordability and Accessibility <input type="checkbox"/> Departmental, College, or School Initiatives <input type="checkbox"/> STEM Leadership <input type="checkbox"/> Transformative Education <input type="checkbox"/> World-Changing Research </div>

Edit a Goal	
<p>Click on Home Menu at top of screen and select Goals</p>	
<p>The Goals dashboard displays.</p> <p>To track your progress or to edit a goal there are two options from the Goals dashboard:</p> <p>Option 1 – Click Edit next to the name of the desired goal.</p> <p>Option 2 – Click  below Actions and select Edit goal.</p> <p>(Note: Indented (subordinate) goal weights are applied to the total goals weight of 100%.)</p> <p>In this example, click Edit.</p>	
<p>Scroll down to enter % Complete and/or select a Status.</p> <p>(Note: Edits to Goal Name, Description, and Metric can also be made throughout the performance plan year.)</p>	
<p>Click Save Changes.</p>	

Cascade a Goal

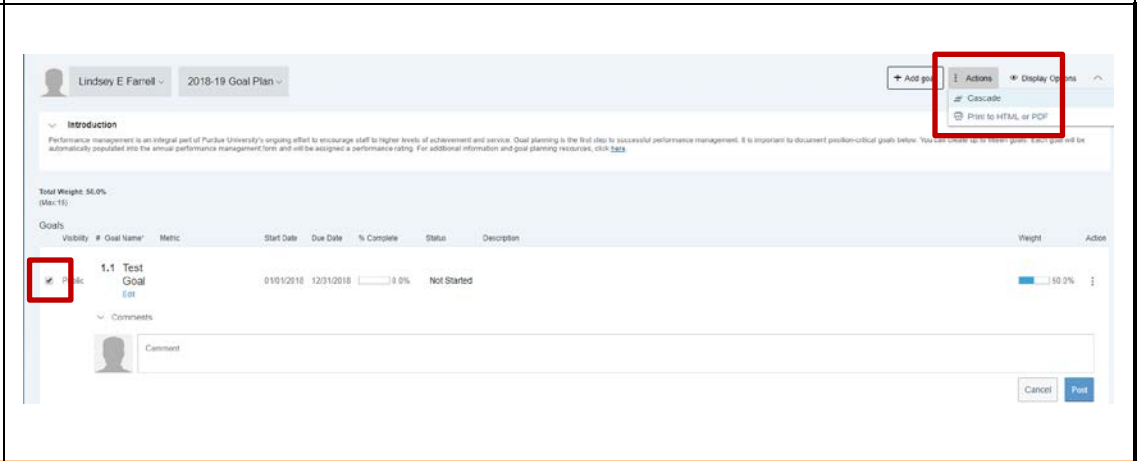
Click on **Home Menu** at top of screen and select **Goals**



After a goal is added, a manager can choose to cascade a goal to one or more direct reports or further down in the organization.

Select the goal.

Click **Actions**, and then select **Cascade**.



Goal Setting and Annual Performance Review for Supervisors

Select the recipient(s) to whom you want to cascade the goal.

Click **Next**.

(Note: Click on the employee name to cascade further down in the organization.)

Step 1. Select Recipients

Step 1 of 2. Select the employees to whom you want to cascade the goal.

Employee Hierarchy

<input type="checkbox"/>	Name	Title	Number of Team Members	Cascaded
<input type="checkbox"/>	Timothy A Werth	Director Senior - Business Process Re-Engineering	6	>
<input type="checkbox"/>	Cindy M Davis	Manager - Communications	7	>
<input type="checkbox"/>	Kerry L Blankenship	Analyst - Communications (2)	0	>
<input type="checkbox"/>	Cathleen R Cline	Technologist - Educational (2)	0	>
<input type="checkbox"/>	Aditya V Das	Student (1)	0	>
<input type="checkbox"/>	Megan E McDole	Student (1)	0	>
<input type="checkbox"/>	Rodney B McPhail	Designer - Graphic (2)	0	>
<input type="checkbox"/>	Derek Russell		0	>
<input type="checkbox"/>	Michelle A Warren	Analyst - Communications (3)	0	>

Other Employees [Find Other Employees](#)

None

Cancel **Next**

Edit goals, as needed, before cascading.

Click **Cascade**.

Step 2. Edit Goal

Step 2 of 2. You can edit the goal (optional) before cascading it to the selected recipients.

Fields marked with * are required.

Already Cascaded To: none

Visibility: **Private**

* Goal Name*: Project Completion within Budget

Description: Complete 100% of __ projects within budget for (time frame)

Metric: % of __ projects completed within budget

* Weight: 25.0 %

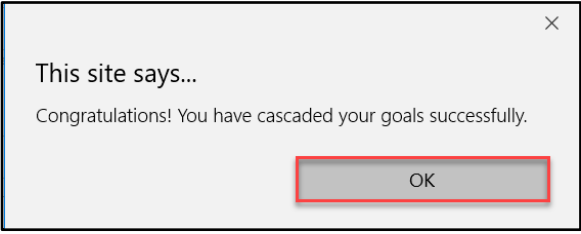
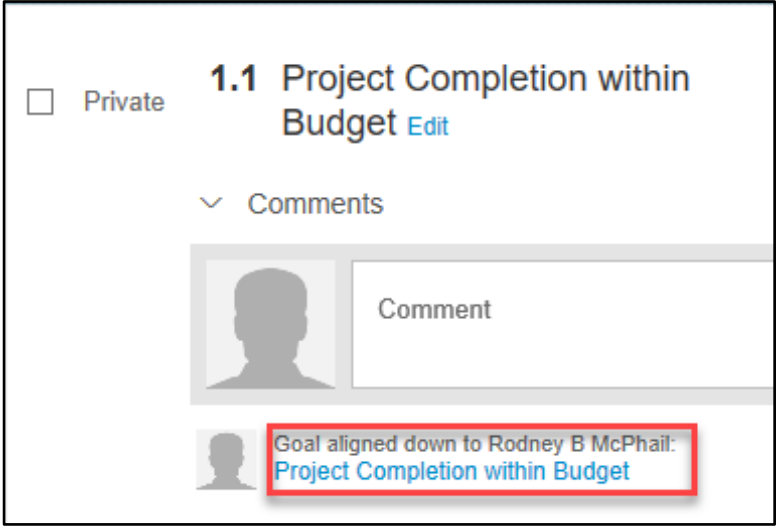
* Start Date: 01/01/2018

* Due Date: 12/31/2018

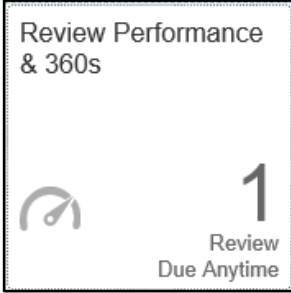
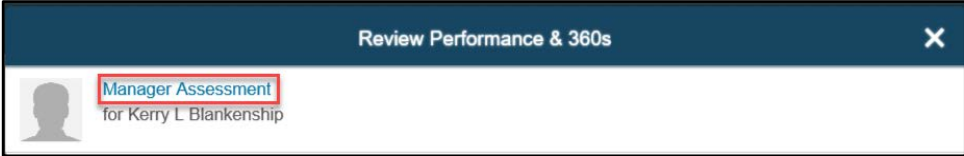
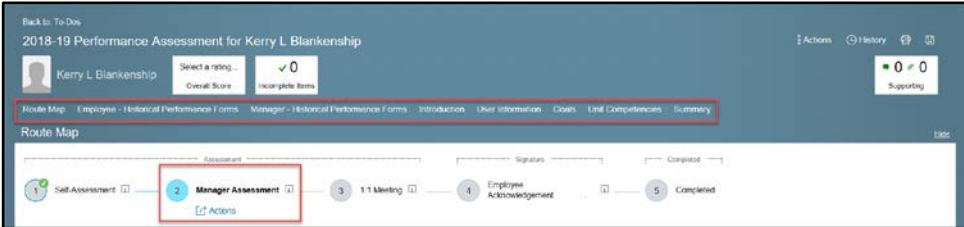
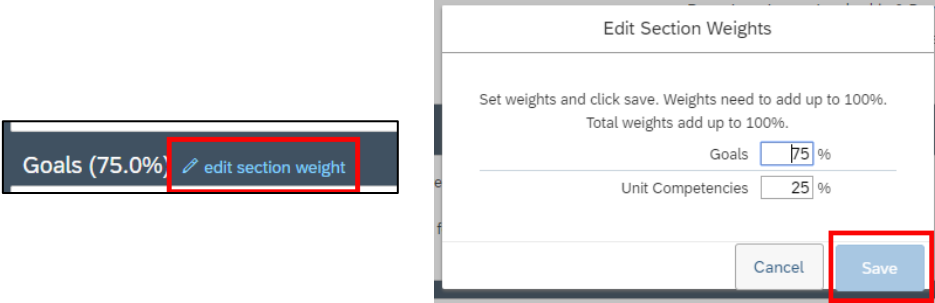
% Complete: 0.0 %

Status: Not Started

Cancel Back **Cascade**

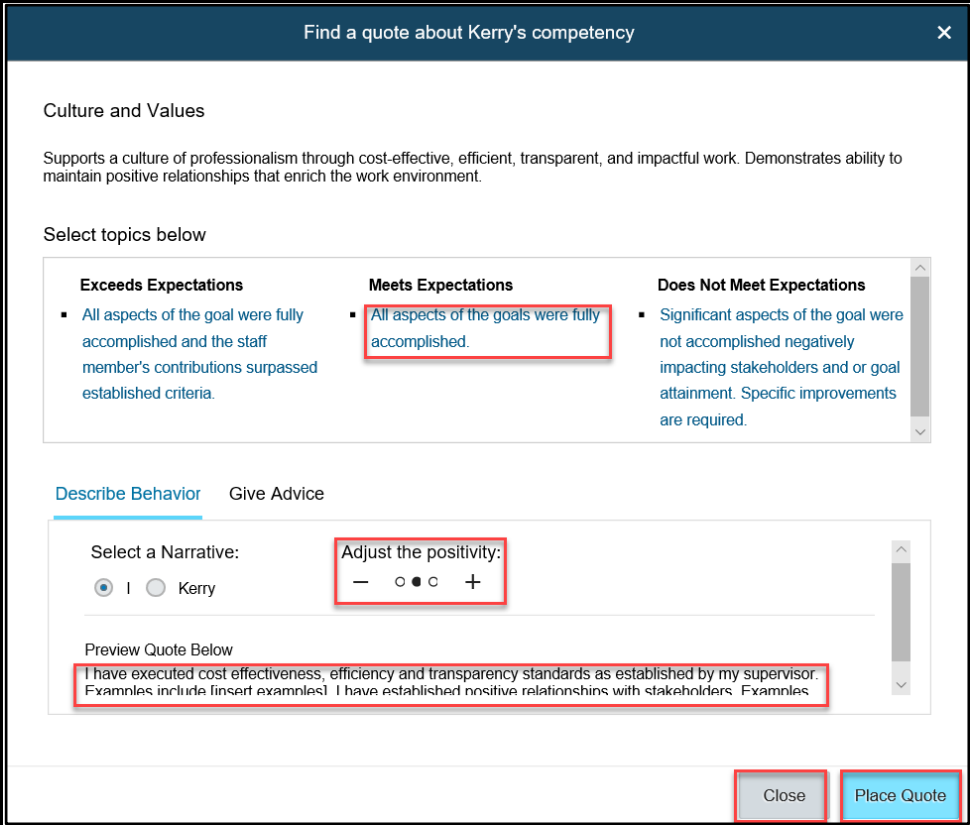
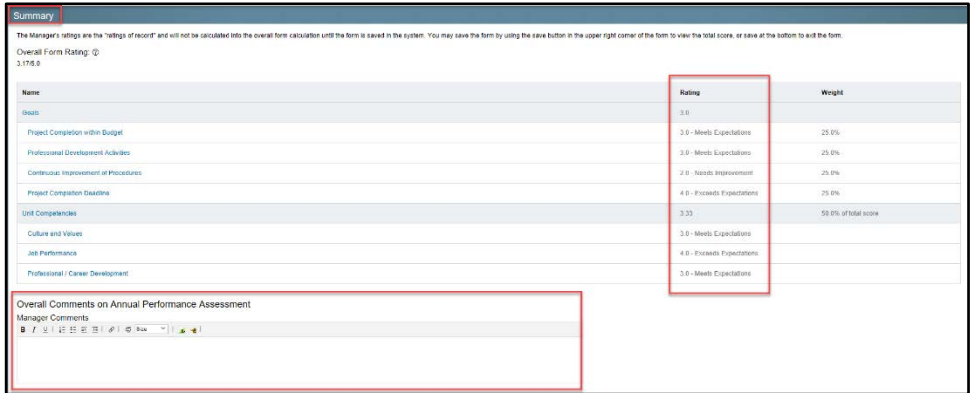


<p>A confirmation displays.</p> <p>Click OK.</p>	 A confirmation dialog box with a close button (X) in the top right corner. The text inside reads: "This site says... Congratulations! You have cascaded your goals successfully." Below the text is a button labeled "OK" which is highlighted with a red border.
<p>The goal now displays the name(s) of the direct report(s) to whom it was cascaded.</p>	 A screenshot of a goal detail view. At the top left is a checkbox labeled "Private". The goal title is "1.1 Project Completion within Budget" with an "Edit" link. Below the title is a "Comments" section with a dropdown arrow. A comment input field is visible with a placeholder "Comment". Below the input field, a comment from "Rodney B McPhail" is shown, with the text "Goal aligned down to Rodney B McPhail: Project Completion within Budget" highlighted by a red border.


Review Employee Goals																	
<p>From the Home page click the Manage My Team tile.</p> <p>Your team displays.</p>																	
<p>Select the desired employee.</p> <p>Click Take Action.</p> <p>Jump To the employee's Goal Plan.</p>																	
<p>The goal plan for the current performance plan year displays.</p> <p>From here you can view and track the status of goals set by the employee to facilitate ongoing discussions throughout the plan year.</p>	<table border="1" style="margin: 10px auto;"> <thead> <tr> <th>Priority</th> <th>Goal Name</th> <th>Start Date</th> <th>Due Date</th> <th>% Complete</th> <th>Status</th> <th>Weight</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>1.1</td> <td>Project Completion within Budget List</td> <td>8/15/2018</td> <td>12/31/2018</td> <td>100.0%</td> <td>Complete</td> <td>25.0%</td> <td></td> </tr> </tbody> </table>	Priority	Goal Name	Start Date	Due Date	% Complete	Status	Weight	Action	1.1	Project Completion within Budget List	8/15/2018	12/31/2018	100.0%	Complete	25.0%	
Priority	Goal Name	Start Date	Due Date	% Complete	Status	Weight	Action										
1.1	Project Completion within Budget List	8/15/2018	12/31/2018	100.0%	Complete	25.0%											
<p><i>Helpful Hint:</i> To access goals for other direct reports, click the name of the active direct report; a search field displays.</p> <p>Enter the name of another direct report.</p> <p>Click the name below the search box.</p>																	

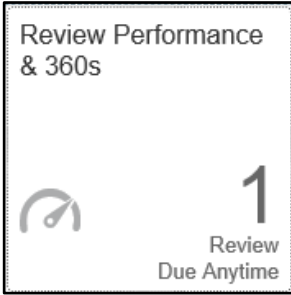
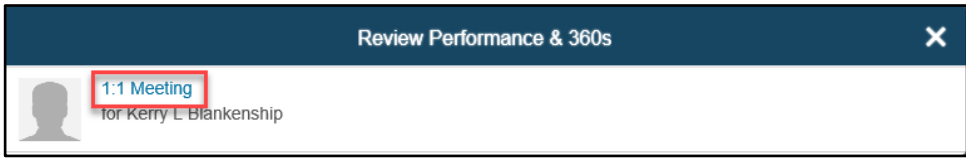

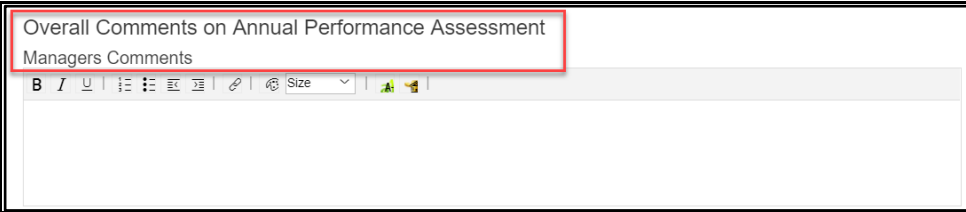

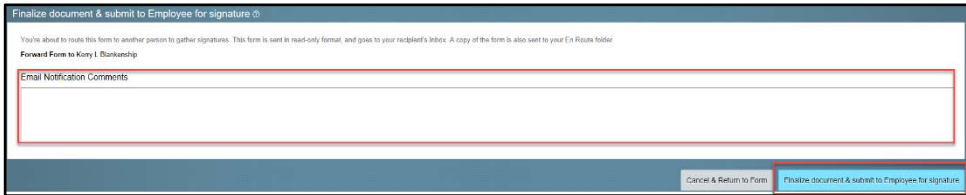
Complete Performance Assessment Annual Review	
<p>Click the Review Performance & 360s tile.</p>	
<p>Click Manager Assessment.</p>	
<p>The Performance Assessment form provides:</p> <ol style="list-style-type: none"> 1. Navigational jump links to each section of the form via the form map. 2. A process flow Route Map that tracks where you are in the process and the steps completed. 	
<p>Scroll down to the section titled Goals. This is the first section in the form.</p> <p><i>Note:</i> If your unit is utilizing weighting other than the 75% goals/25% competencies weighting, click Edit Section Weight and enter the appropriate weights (as defined by your unit)</p>	

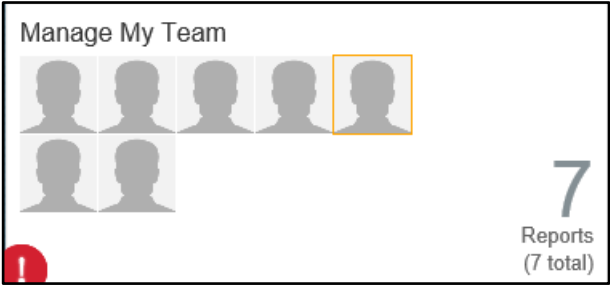
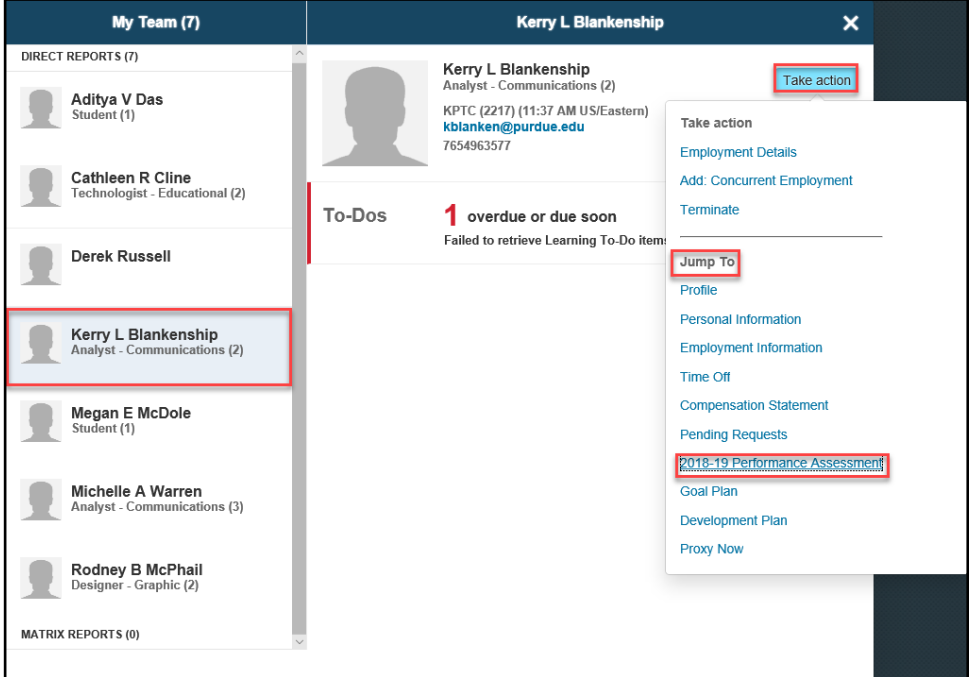
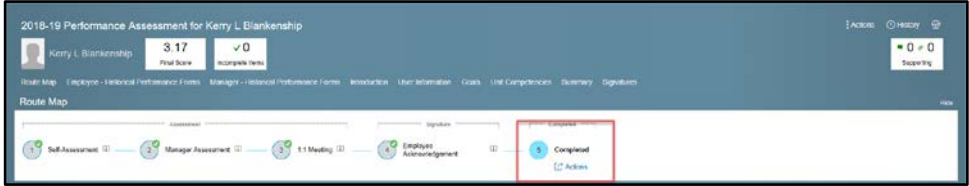
<p>For each Goal, review the Additional Comments, enter a Rating and relevant Manager Comments (optional).</p>	
<p>After all the goals have been rated, scroll down to enter Overall Comments on Goal Achievement. (optional)</p>	
<p>Scroll down to Unit Competencies and click Add Competency.</p>	
<p>Ensure a checkmark is placed beside the competencies utilized by your unit. Add checkmarks, as appropriate, and click Add to save the unit competencies in the form. Remove competencies by selecting the adjacent trash icon next to the competency name.</p>	
<p>Review Additional Comments, complete the Rating and Manager Comments (optional) for each section.</p> <p>For suggested wording, click Writing Assistant.</p>	

Goal Setting and Annual Performance Review for Supervisors

<p>For each unit competency sample language is provided that aligns to three performance levels.</p> <p>Click the performance level; sample language appears in the Preview Quote Below section.</p> <p>From here you can Adjust the positivity (- / +).</p> <p>Once you are satisfied with the wording, click Paste Quote and Close.</p> <p>Edit sample language as appropriate</p>	
<p>Scroll down to the Summary.</p> <p>Review the final Rating for each goal and competency.</p> <p>Enter Overall Comments on Annual Performance Assessment before moving to the next step (1:1 meeting).</p>	
<p>To view the Overall Score, scroll to the top of the form.</p>	
<p>At any time, you can send the form back to the employee for review and additional edits.</p>	

<p>Click Send back to Employee for review.</p> <p>If the performance assessment is complete, click Send to 1:1 Meeting Step.</p>	
<p>Confirm by clicking Send to 1:1 Meeting Step again.</p>	

Finalize Annual Evaluation After 1:1 Meeting	
Click the Review Performance & 360s tile.	
Click 1:1 Meeting .	
The employee's Performance Assessment form indicates the process is at Step 3: 1:1 Meeting .	
After the 1:1 meeting, make any necessary edits to the form and enter final Overall Comments on Annual Performance Assessment .	
Click Finalize document & submit to Employee for signature .	
Enter Email Notification Comments . (optional) Click Finalize document & submit to Employee for signature again.	

Verify Employee Electronic Signature	
<p>Click the My Team tile.</p> <p>(Note: You can also navigate to the Performance dashboard to see a list of documents.)</p>	
<p>Select the desired employee.</p> <p>Click Take Action.</p> <p>Jump To the employee's Performance Assessment.</p>	
<p>The Route Map indicates Step 5 in the process is Completed.</p>	
<p>Scroll to the bottom of the page to view final comments, if left by the employee</p>	