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)

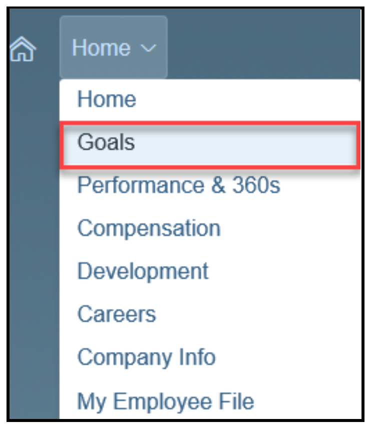
Intro to Performance Assessment Annual Review (Supervisors)

Access SuccessFactors

Visit **OneCampus (**https://one.purdue.edu/) and select **SuccessFactors**. Log in using your Purdue User ID and Boiler Key passphrase.

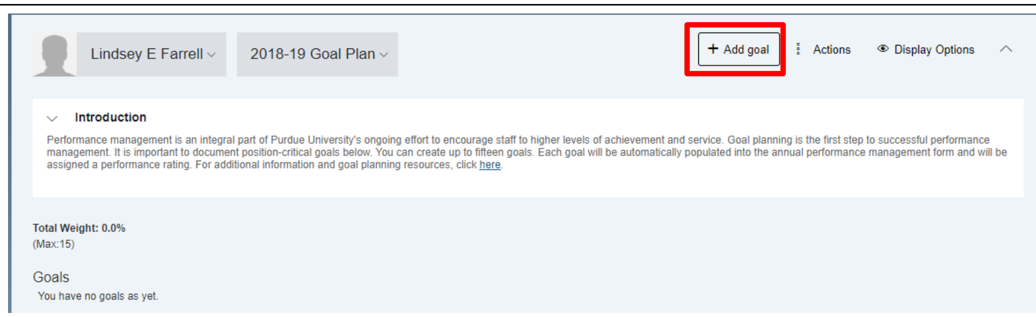
Add a New Goal

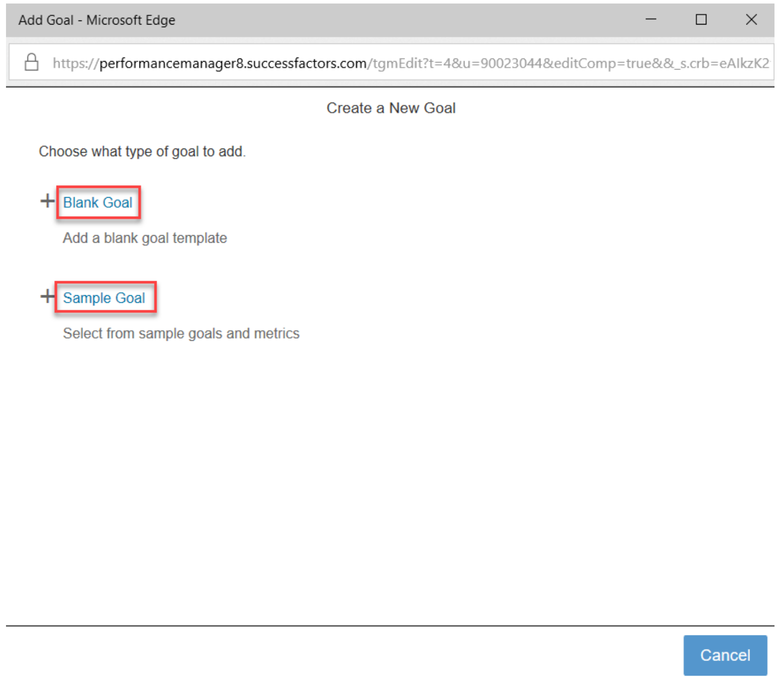
Click on **Home Menu** at top of screen and select **Goals**



The **Goals** dashboard displays.

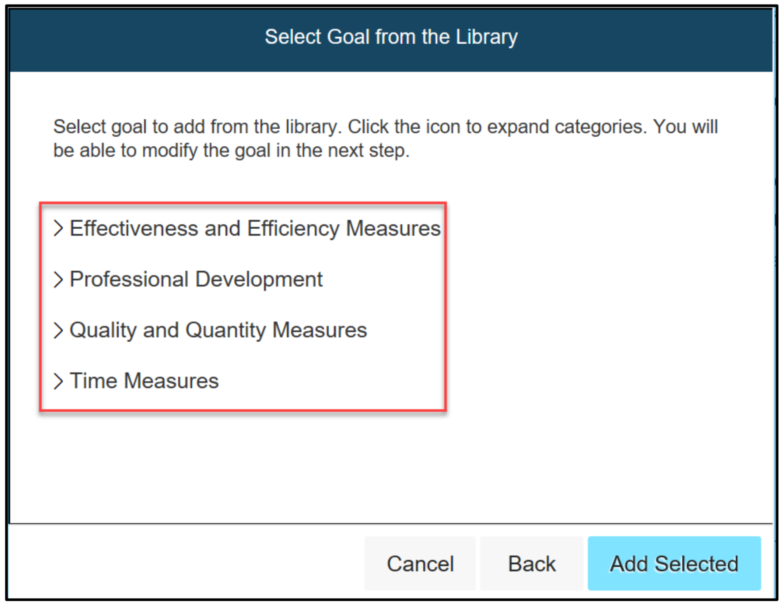
Click **Add Goal**.



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

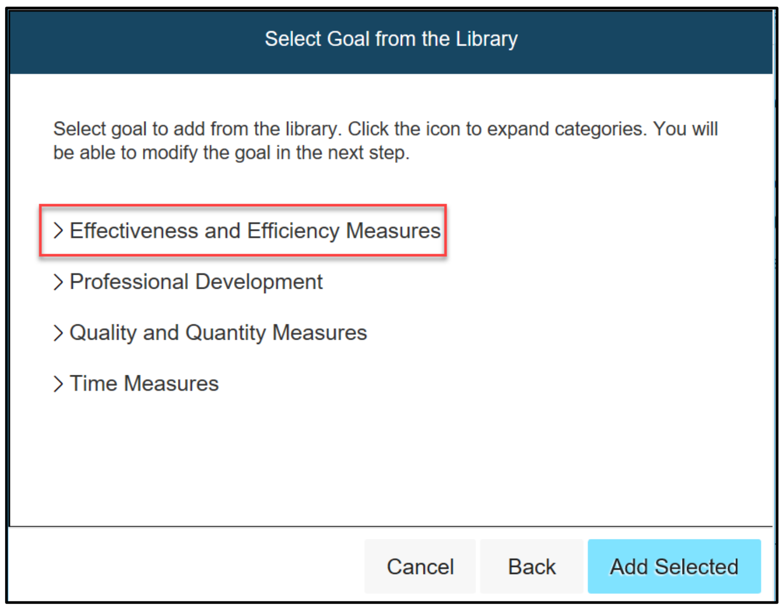
Click the arrow **(>)** to the left of one of the four Purdue overarching metric and measurement categories to view related goals.

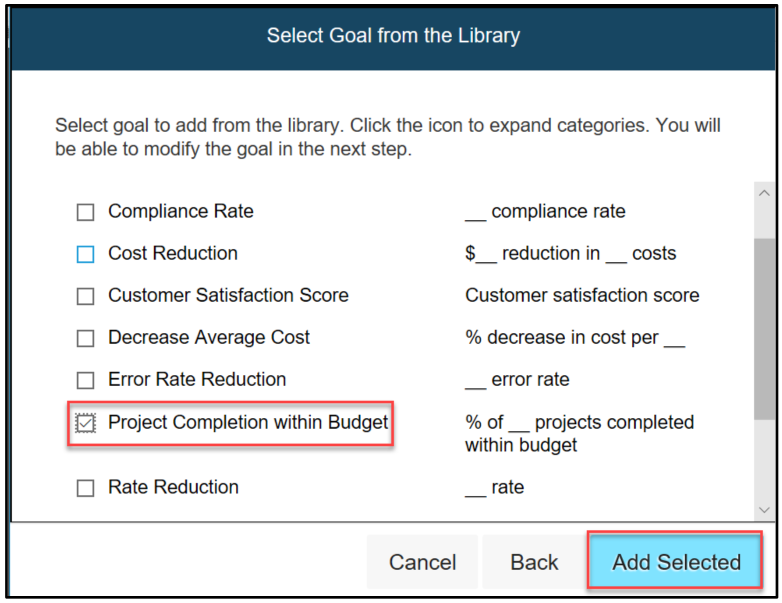
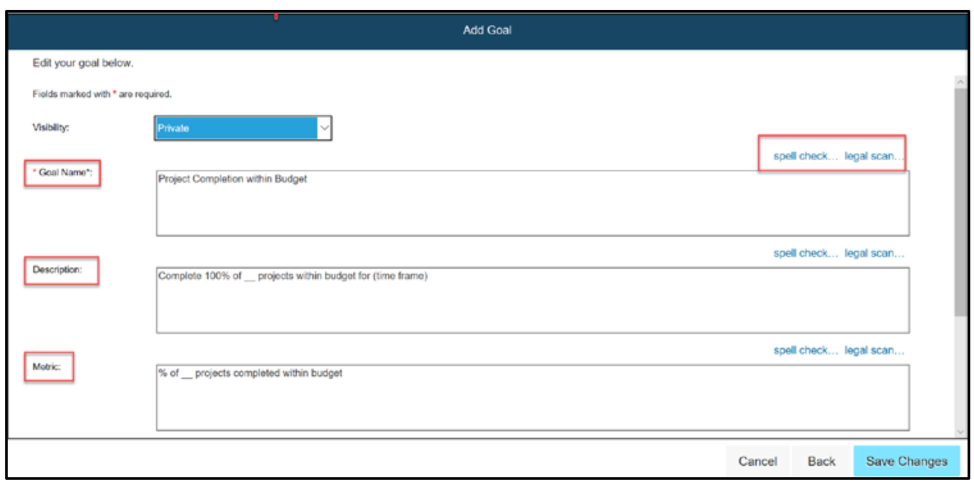


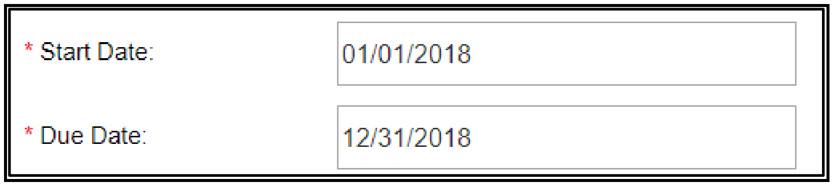
Select one or more goals.

In this example, we've select **Effectiveness and Efficiency Measures.**

Click the right facing arrow > to expand the category.

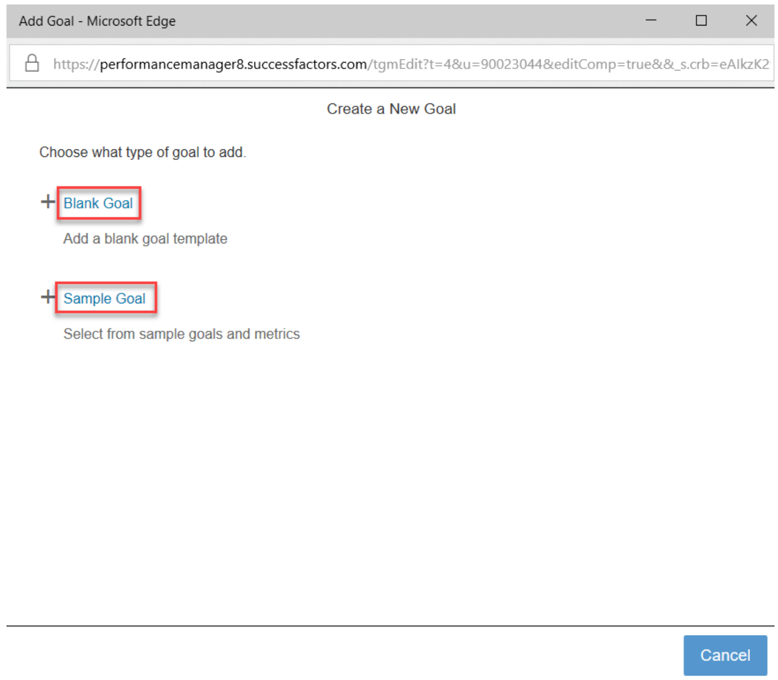


Select the individual goal of **Project Completion within Budget.** Click **Add Selected**.	
The new goal is auto-populated with the **Goal Name** (required), **Description**, and **Metric.** **Visibility** defaults to *Private*. This means that the goal is only visible to the employee, their supervisor, 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.	
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.	

(*Note*: Weighting for all goals must equal 100% at the time of the annual performance review.)	
Scroll down to enter the **Start Date** (required) and **End Date** (required).	
Continue to scroll down to enter the **% Complete** and **Status**.	
Click **Save Changes**.	

Add a Blank Goal

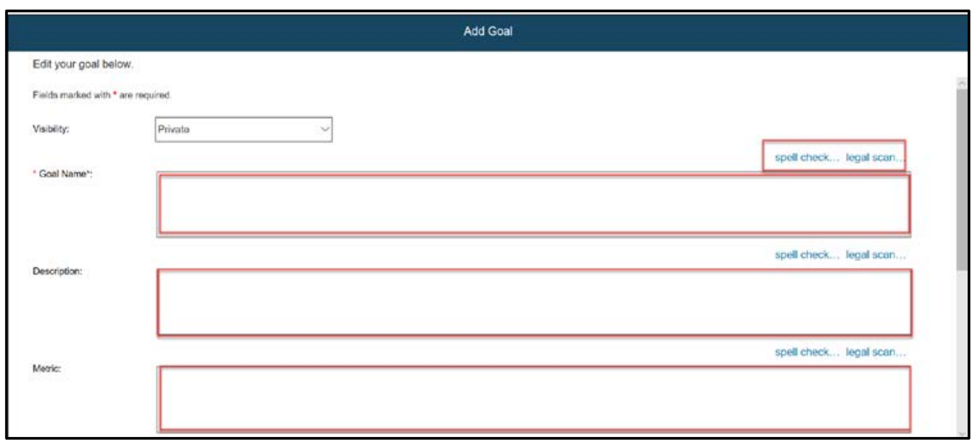
Next, click **Blank Goal.**



The upper portion of the new goal contains the **Goal Name,** a **Description**, and **Metric**; all three of these fields appear blank.

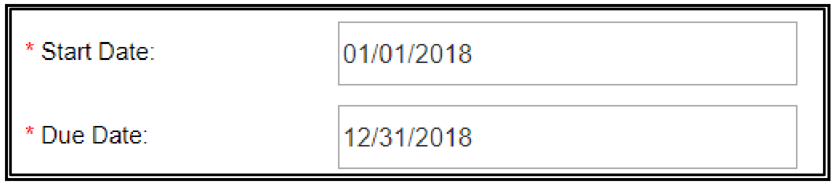
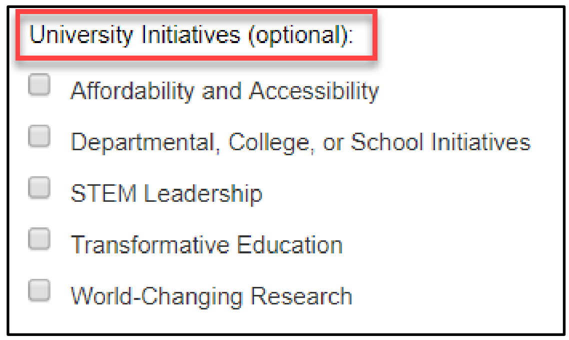
Enter a **Goal Name** (required) and a **Description** and **Metric** (optional).

Spell check and **legal scan** are available. The legal scan flags potentially problematic language.

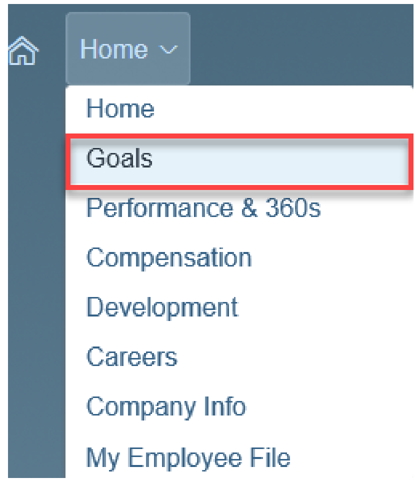
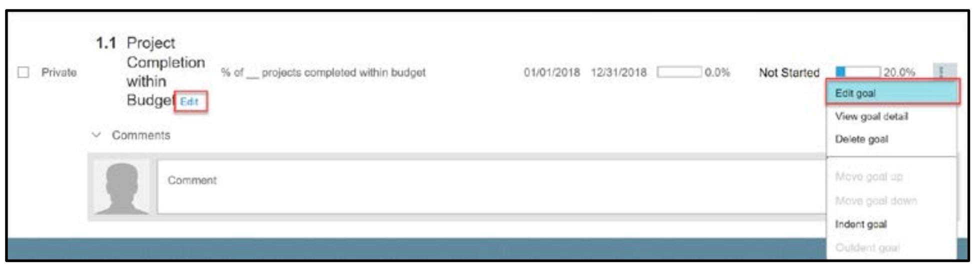
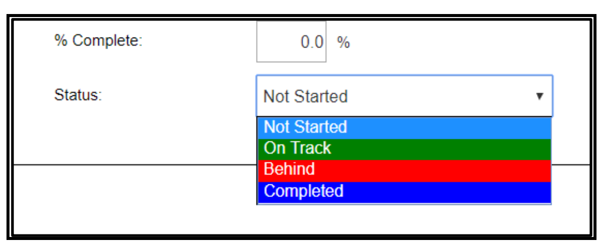


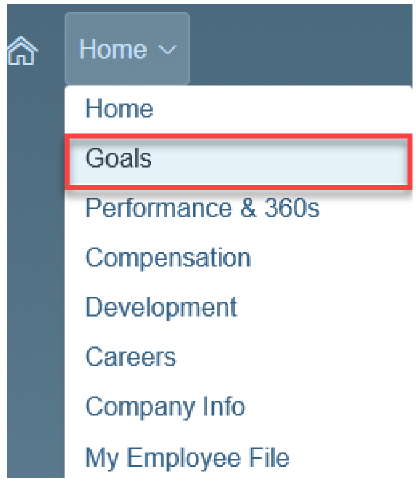
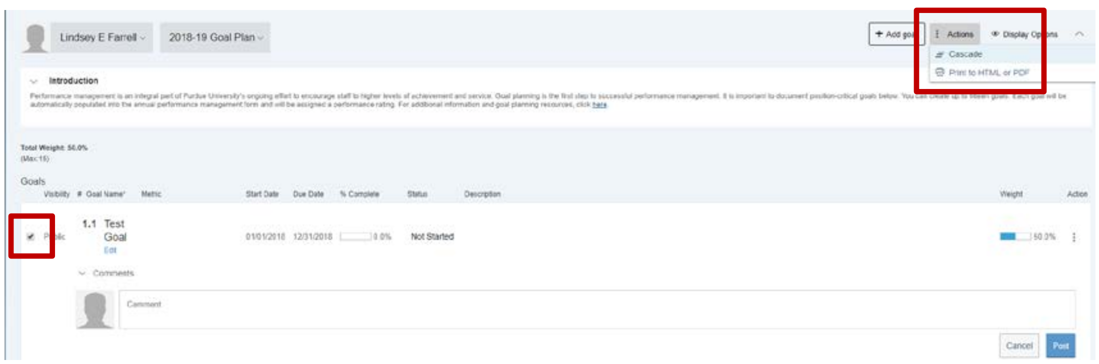
Scroll down to enter the percentage of **Weight** (required) this goal carries toward the total weight of 100% for all goals established for the performance plan year.

(*Note*: Weighting for all goals must equal 100% at the time of the annual performance review.)

Scroll down to enter the **Start Date** (required) and **End Date** (required).	
Scroll down to enter the **% Complete** and **Status**.	
Lastly, scroll down to select **University Initiatives (optional).** *(Note*: When a **Sample Goal** is added, the **University Initiates** do not display, however, they can be viewed when editing a **Library Goal**.)	

Edit a Goal

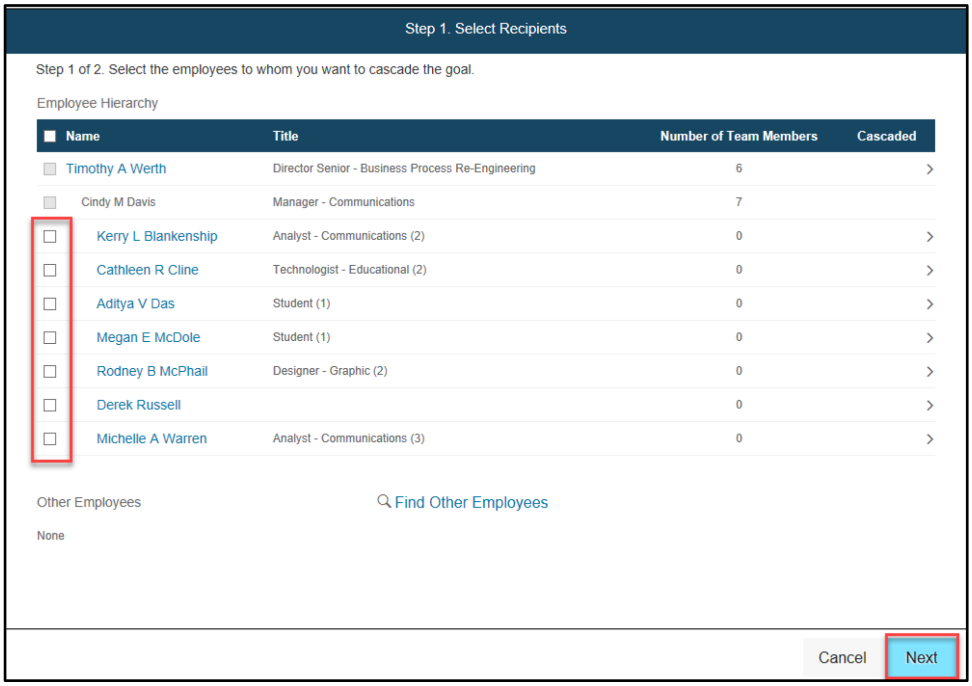
Click on **Home Menu** at top of screen and select **Goals**	
The **Goals** dashboard displays. To track your progress or to edit a goal there are two options from the Goals dashboard: Option 1 – Click **Edit** next to the name of the desired goal. Option 2 – Click  below **Actions** and select **Edit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

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**.	

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

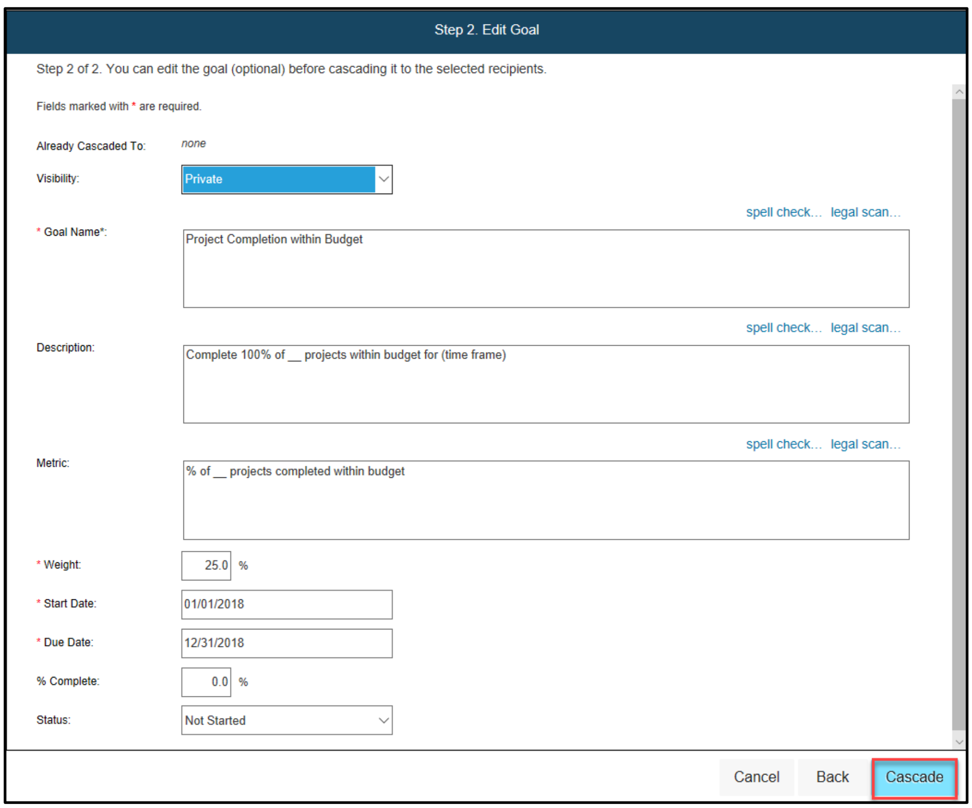
Click **Next**.

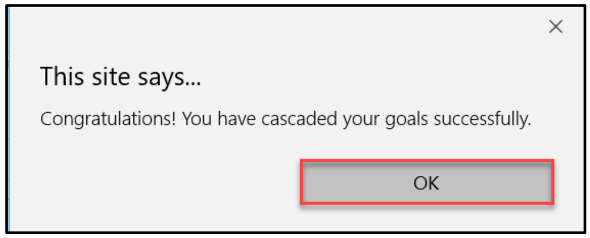
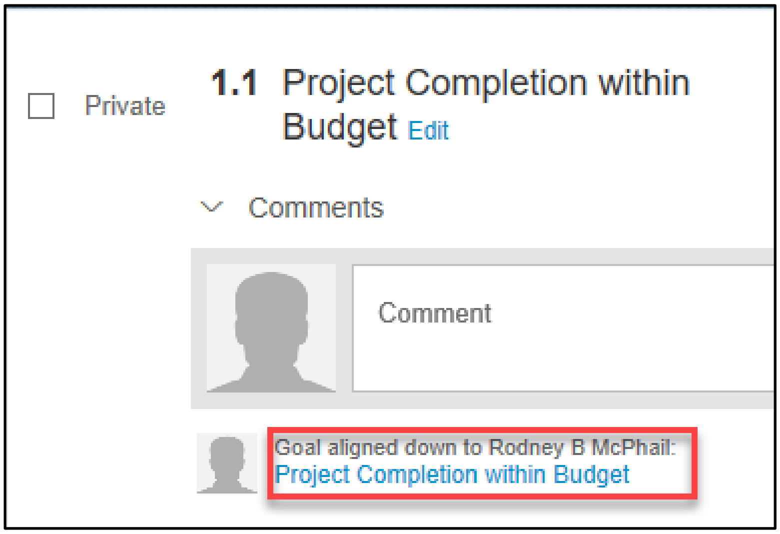
(Note: Click on the employee name to cascade further down in the organization.)



Edit goals, as needed, before cascading.

Click **Cascade**.

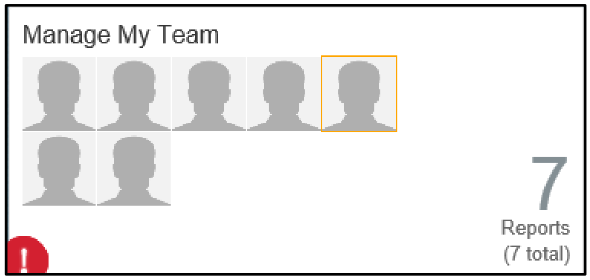


A confirmation displays. Click **OK**.	
The goal now displays the name(s) of the direct report(s) to whom it was cascaded.	

Review Employee Goals

From the **Home** page click the **Manage My Team** tile**.**

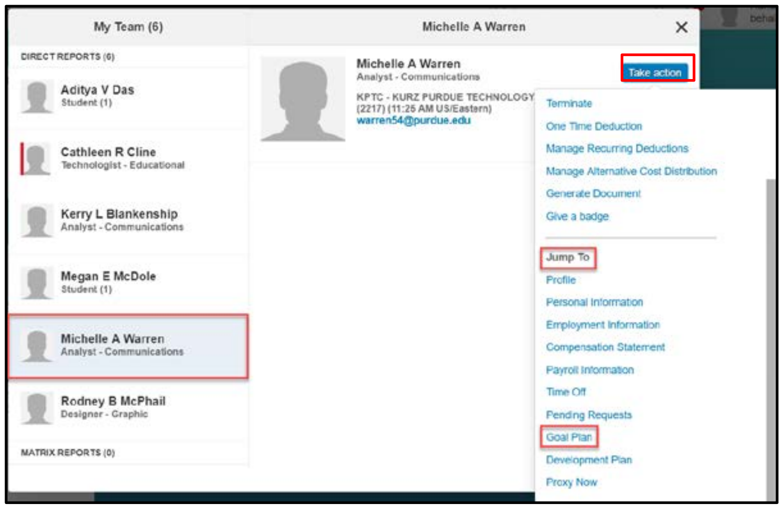
Your team displays.



Select the desired employee.

Click **Take Action**.

Jump To the employee's **Goal Plan.**



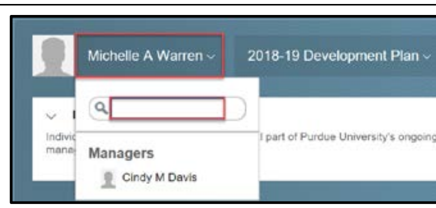
The goal plan for the current performance plan year displays.

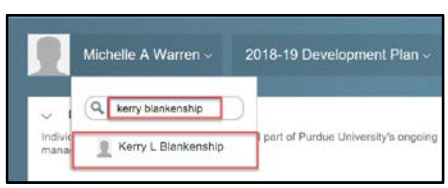
From here you can view and track the status of goals set by the employee to facilitate ongoing discussions throughout the plan year.

Helpful Hint: To access goals for other direct reports, click the name of the active direct report; a search field displays.

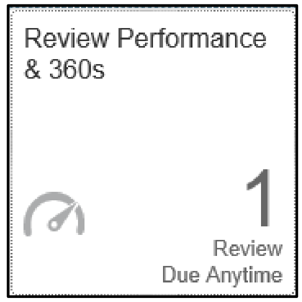
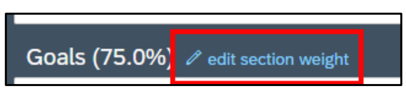
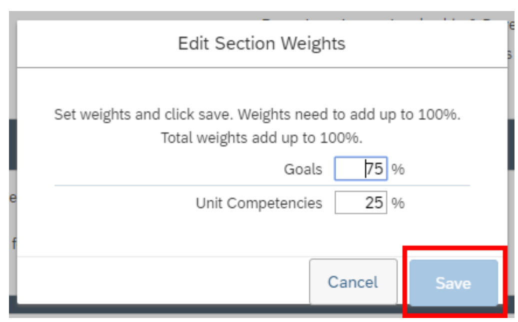
Enter the name of another direct report.

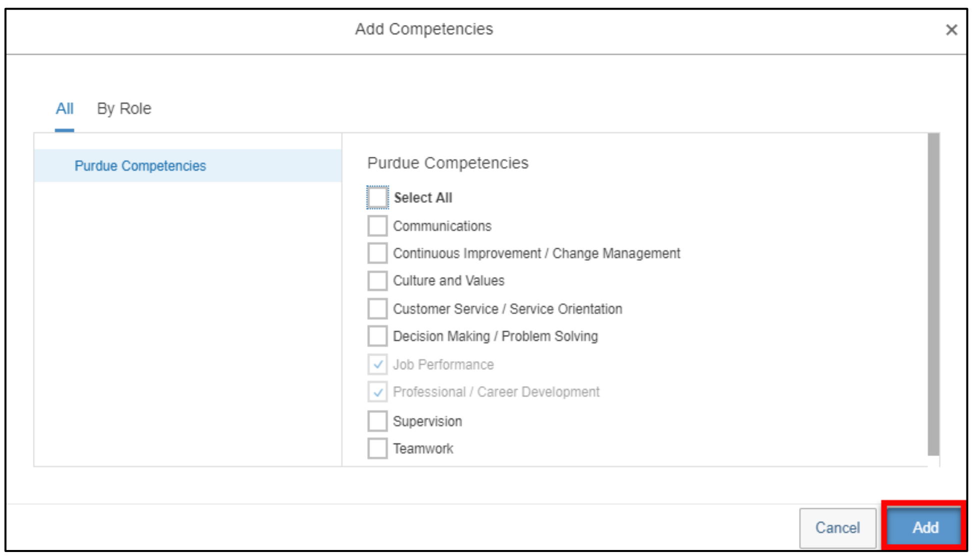
Click the name below the search box.





Complete Performance Assessment Annual Review

Click the **Review Performance & 360s** tile.	
Click Manager Assessment.	
The **Performance Assessment** form provides: 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.	
Scroll down to the section titled **Goals**. This is the first section in the form. *Note*: 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)	 

For each **Goal**, review the **Additional Comments**, enter a **Rating** and relevant **Manager Comments** (optional).	
After all the goals have been rated, scroll down to enter **Overall Comments on Goal Achievement**. (optional)	
Scroll down to Unit Competencies and click **Add Competency**.	
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.	
Review **Additional Comments**, complete the **Rating** and **Manager Comments** (optional) for each section. For suggested wording, click **Writing Assistant.**	

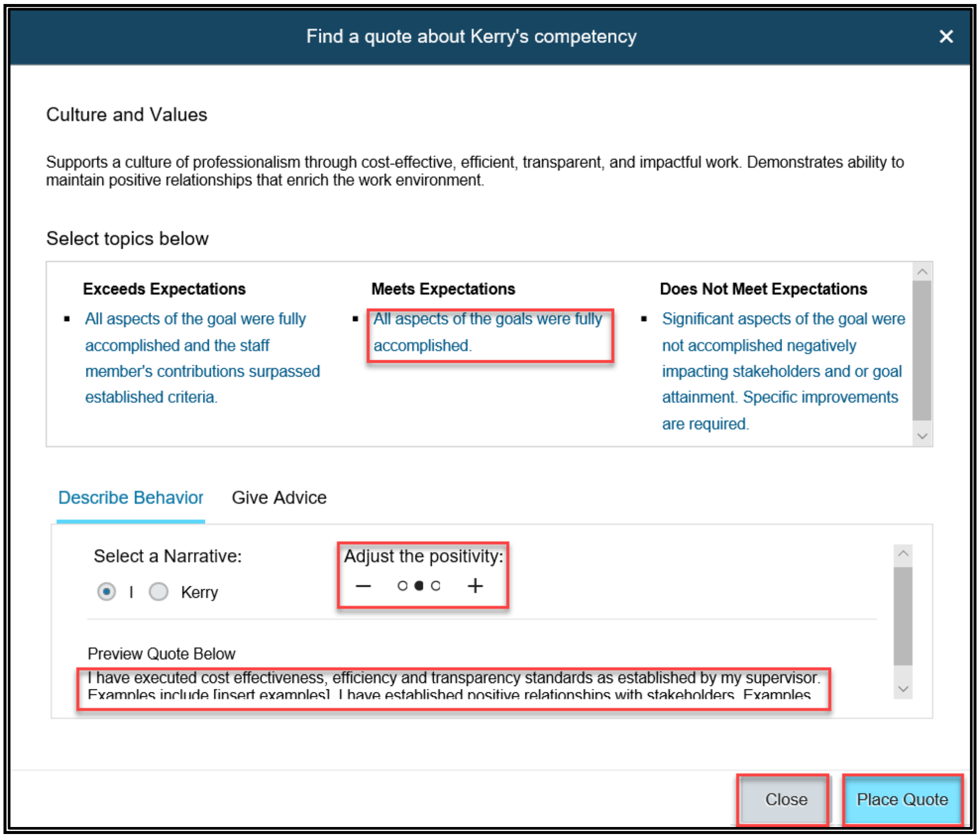
For each unit competency sample language is provided that aligns to three performance levels.

Click the performance level; sample language appears in the **Preview Quote Below** section.

From here you can **Adjust the positivity (- / +)**.

Once you are satisfied with the wording, click **Paste Quote** and **Close.**

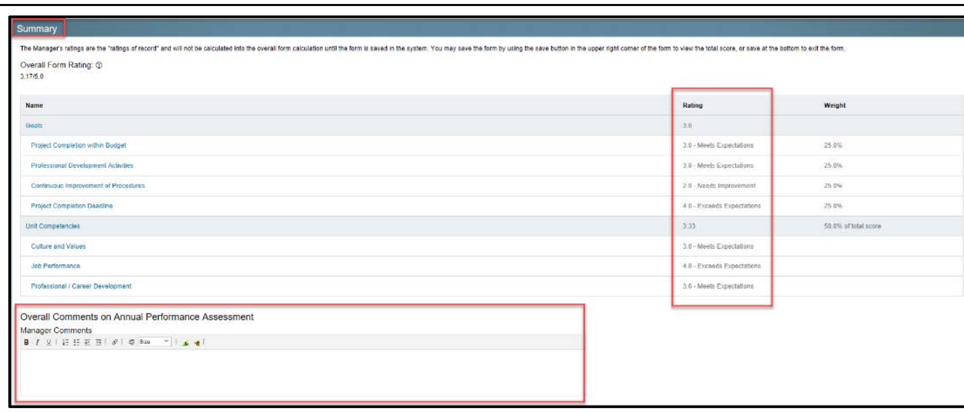
Edit sample language as appropriate



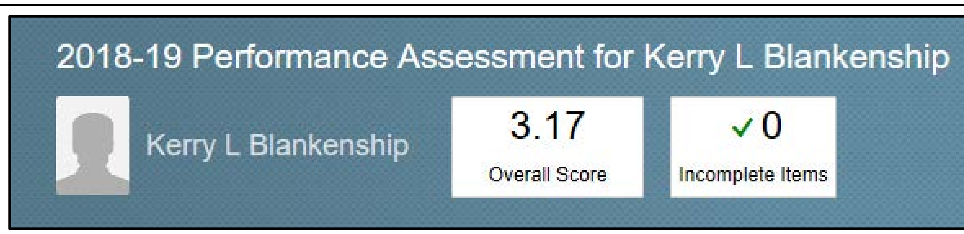
Scroll down to the **Summary**.

Review the final **Rating** for each goal and competency.

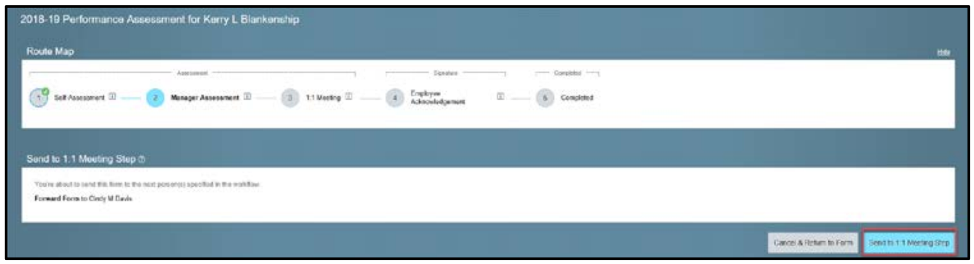
Enter **Overall Comments on Annual Performance Assessment** before moving to the next step (1:1 meeting).



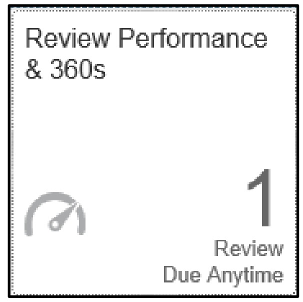
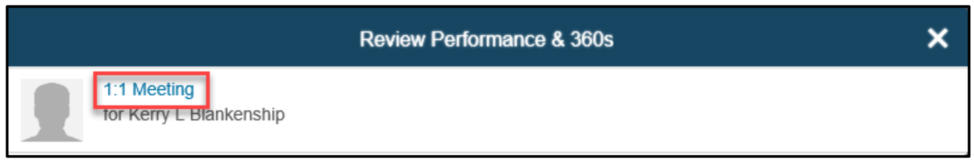
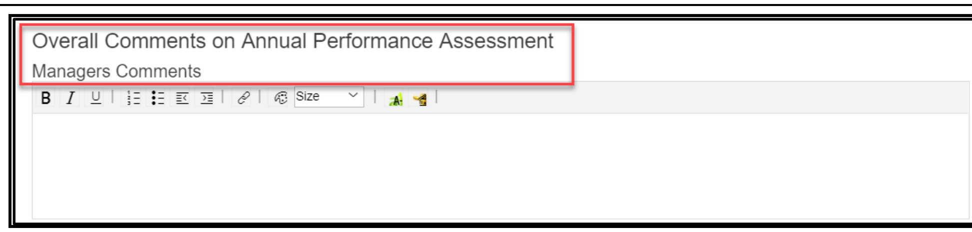
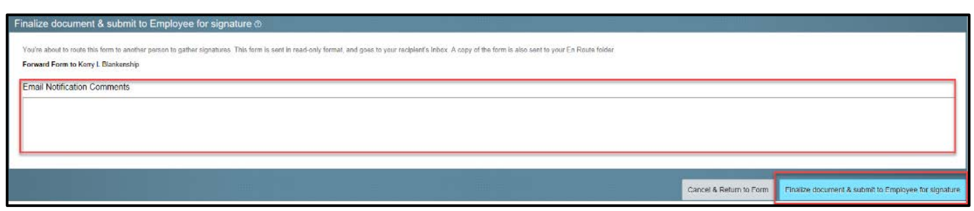
To view the **Overall Score**, scroll to the top of the form.



At any time, you can send the form back to the employee for review and additional edits.

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

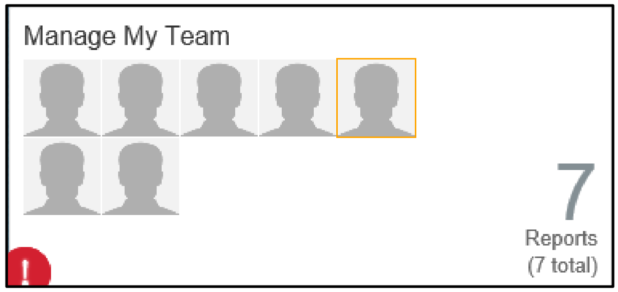
Finalize Annual Evaluation After 1:1 Meeting

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

Click the **My Team** tile**.**

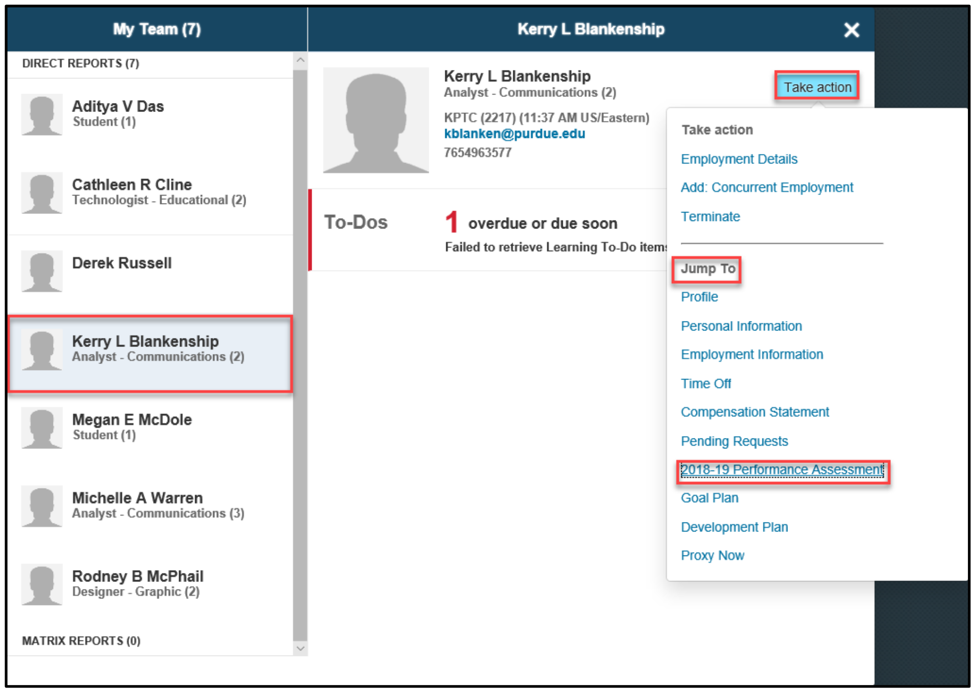
(Note: You can also navigate to the Performance dashboard to see a list of documents.)



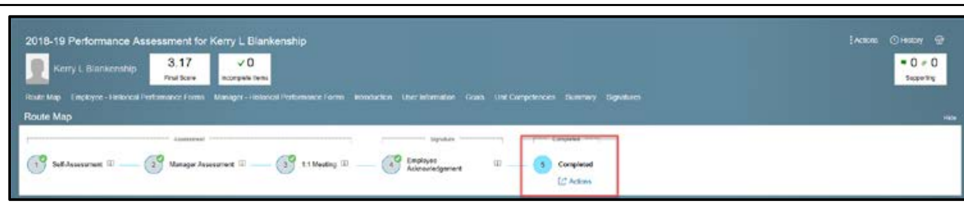
Select the desired employee.

Click **Take Action**.

Jump To the employee's **Performance Assessment**.



The **Route Map** indicates Step 5 in the process is **Completed**.



Scroll to the bottom of the page to view final comments, if left by the employee