SuccessFactors Training Guide: Data Entry

Log In
- Go to the SuccessFactors on the HR website or
- Log in to the MyRecords
- Use your NET Id and Password
- Click the SuccessFactors icon.
- https://appserve.musc.edu/myrecords/

NOTE:
GOALS TAB: Job duties, position descriptions and pillar goals are entered here.

PERFORMANCE TAB: The employee forms are found here.

There are two performance management forms in SuccessFactors: Planning Stage Acknowledgment and Annual Review Form.

Data Entry:
Add Position Description Data on the Goals Tab
1. Click the Goals Tab.
2. If acting on supervisor’s behalf, go to top right of screen and click proxy now. Type your supervisor’s name.
3. On the Switch Plan drop-down at the top right, choose Position Description.
4. Select the employee whose goals you would like to enter by clicking the magnifying glass beside the employee’s name in the Employee Hierarchy section.
5. Click the Add a New Position Requirement button.
6. In the Position Purpose field, copy and paste the text from the Job Summary (Section III) of the old form or type text into this box.
7. In the Requirements field, copy and paste the text from the Knowledge, Skills, and Abilities and Licenses and Certifications (Section II) of the old form or type text into this box. Note:
8. In the Physical Requirements field, copy and paste the text from the Physical Requirements (Section II) of the old form or from the HR web page.
9. Click the UNIV Physical Requirements link on the top of the Goal Plan page to find the appropriate physical requirements for the job.
10. Click the Save Changes button.

Add Job Responsibilities on the Goals Tab
1. Click the Goals Tab.
2. On the Switch Plan drop-down at the top right, choose Job Responsibilities.
3. Select the employee whose goals you would like to enter by clicking the magnifying glass beside the employee’s name in the Employee Hierarchy section.
4. Click the Create a New Job Responsibility button.
5. In the Job Responsibility field, copy and paste the text from the first Job Task (Section III, Part A) of the old form or type the text into this box.
6. In the Success Criteria field, copy and paste the success criteria text from the first Job Task of the old form or simply type the success criteria into this box.
7. Enter the Weight for the job responsibility. (Note: Weights within the Job Responsibilities should add up to a total of 100%)
8. Click the Save Changes button.
Repeat Steps 4 – 8 for each additional Job Responsibility until you reach 100%.

Add Pillar Goals on the Goals Tab
Note: Since Pillar Goals will be shared among staff, these should be cascaded from the leader’s Goals tab. Instructions on how to enter New Pillar Goals, click here
Cascade Goals
1. Click the Goals Tab.
2. On the Switch Plan drop-down at the top right, choose the appropriate plan. You can cascade Position Description, Job Responsibilities, or 2010 Pillar Goals items.
3. Select the leader whose items you would like to cascade by clicking the magnifying glass beside the leader’s name in the Employee Hierarchy section.
4. Check the box beside each item that you would like to cascade. (You can cascade multiple items at one time.)
5. Click the Cascade Selected button
6. To cascade, check the box to the left of the direct reports or if you wish to cascade to all the direct reports, check the box beside the Name column header at the top (this will select all direct reports).
7. Click the Next button.
8. You will see a preview of the information before you cascade. Most of the information will stay the same for the employees, but you will most likely need to change the Weight of the goals for the Pillar Goals section when you cascade them to the employee. Click the Cascade button.

Edit Position Description, Job Responsibilities or Pillar Goals
1. If you need to edit the goal, click the goal name to open the goal edit window.
2. If you need to view audit information about a goal, click the blue circle with a white i. It is in the far right under actions.
3. The total cumulative weight now displays at the top of the screen.
4. If your weight does not equal 100%, you get a warning message which displays, telling you that you are under or over 100%. This does not prevent you from saving the records or from leaving the screen; it is merely a visible reminder.

Delete Position Description, Job Responsibilities or Pillar Goals
1. Click the Goals Tab.
2. On the Switch Plan drop-down at the top right, choose the appropriate plan. You can delete from Position Description, Job Responsibilities, or 2010 Pillar Goals items.
3. Select the employee whose item(s) you would like to delete by clicking the magnifying glass beside the employee’s name in the Employee Hierarchy section.
4. Check the box beside (left side) the item(s) that you would like to delete.
5. Click the Delete Selected button. When you see the message “Are you sure you want to delete the selected Goal(s) from the employee’s plan?” click the OK button.

To View Form Status
1) Log into SuccessFactors
2) Click the Performance Tab
3) To view completed Forms: On the left side of the screen, click the "completed button".
4) To View where form is located: On the left side of the screen, click the "in progress button"
5) If the form is still with the supervisor, (it will say Supervisor Verification), please have that supervisor go into their SuccessFactors and send the form to the employee for signature.