PERFORMANCE MANAGEMENT
Frequently Asked Questions

General

Q: Where is SuccessFactors?

A: Option 1: Access SuccessFactors from The Exchange, the college’s intranet site.

STEP 1 OF 3:
From the home page of the internal San Jac website, click on College Resources:
STEP 2 OF 3:
Choose Performance Management from the drop down list:
STEP 3 OF 3:
Choose SuccessFactors (Spark Learning & Performance Management) from the left-hand menu:
A: Option 2: Access SuccessFactors from [www.sanjac.edu](http://www.sanjac.edu):

STEP 1 OF 3:
From the home page of [www.sanjac.edu](http://www.sanjac.edu), click on About San Jac and choose the Human Resources link under College Operations:
STEP 2 OF 3:
From the menu on the left-hand side of the screen, click on Resources:
**STEP 3 OF 3:**
Click on SuccessFactors (Spark Learning and Performance Management)

<table>
<thead>
<tr>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPAF</td>
</tr>
<tr>
<td>Exit Process</td>
</tr>
<tr>
<td>Performance Management</td>
</tr>
<tr>
<td>Required Trainings</td>
</tr>
<tr>
<td>SOAR - Hiring Leader Access</td>
</tr>
<tr>
<td>SuccessFactors (Spark Learning &amp; Performance Management)</td>
</tr>
</tbody>
</table>

**Q: What is my login and password the first time I log in to SuccessFactors?**

**A:** The first time you log in to SuccessFactors, your username is: `FIRSTNAME.LASTNAME`
Your password will be your G number; input a capital G and then the numbers. The system will then prompt you to create a new password. Your username will always be: `FIRSTNAME.LASTNAME`
Q: How do I reset my password in Success Factors?

A: In the log in box, type in your user name (FIRSTNAME.LASTNAME) and then click on the “Forgot Password” link that is under the password box. Follow the steps to reset your password, and you will receive an email with reset instructions.

If this process does not work, please contact Human Resources at ext. 6115.
Q: How do I write a KPI (Key Performance Indicator) for my IPP (Individual Performance Plan)?

A: The KPI should be S.M.A.R.T. – Specific, Measurable, Attainable, Relevant and Time Bound. You should work with your leader on what your KPIs should be for each review period.

Q: Where can I find more information on creating KPIs in Success Factors?

A: There are two ways to access the online tutorial document that provides step-by-step instructions on creating an IPP.

Option 1

STEP 1 OF 3:
From the Home page of SuccessFactors, click on the Home button and choose Company Info from the drop down menu.
**STEP 2 of 3:**
At the top left-hand side of the page, click on Resources:

![Company Info](image)

**STEP 3 of 3:**
Click on the link for SuccessFactors – How to Navigate an IPP:

![Company Resources](image)
Option 2

1. Click on the following link, or copy and paste the link into your browser: 

2. Under the Instructional Tools and Resources heading, click on the link for Success Factors – How to Navigate an IPP - or just click here: SUCCESSFACTORS - How to Navigate an IPP (PDF).

Q: When I have finished writing my KPIs, how do I forward my IPP to my leader?

A: The IPP is visible to both you and your leader; you do not need to forward it upon completion.

Q: How many KPIs should I have?

A: It is recommended that you have 3 – 5 KPIs, but no more than 15.

Q: Why can’t I delete a KPI I created?

A: Only leaders have the ability to delete a KPI for their employees. Contact your leader if you need to delete one.
Q: Am I able to update the status in my KPI throughout the year?
A: Yes: to the far right of your KPI, under the Action column, there is a button you click to edit:
**Mid-Year Review**

**Q:** When I go into my IPP for Mid-Year Review, why can’t I find the comment boxes?

**A:** In order to complete the Mid-Year Review, you should click on Performance from the Home drop down menu, instead of IPP.

**STEP 1 OF 3:**

Your performance evaluation for the mid-year review will be available as a link in the middle of the page:

**My Forms**

**STEP 2 OF 3:**

Your performance evaluation for the mid-year review will be available as a link in the middle of the page:
STEP 3 OF 3:
After you click on the link to your performance evaluation, you will find comment boxes under each KPI.

Q: Is there a limit to the number of characters available in comment boxes?

A: Yes; there is a 4000-character limit for each text box. This means that you only have 4000 characters available for mid-year review and performance evaluation comments combined.

Q: Do I have to write a comment for each KPI?

A: Yes; this is how you update your leader on the status of your KPIs.
Q: Am I able to update my KPIs from the performance evaluation document, or do I have to go back into my IPP?

A: You are able to update your KPIs from the performance evaluation document. To the far right of the page for each KPI, there is an edit button; click the button and a pop up window will appear where you can update the status, % completed, etc. for your KPI.

Q: Once I complete my mid-year review, how do I send it to my leader?

A: There is a “Send to (leader name)” button at the top and the bottom of the page:

OPTION 1 of 2: The button at the top of the page:

OPTION 2 of 2: The button at the bottom of the page:
Performance Evaluation

Q: Do I have to fill in all the comment boxes in my self-evaluation?

A: Yes: SuccessFactors will not let you forward your evaluation until you complete all of the comment boxes.

Q: How do I attach a document to my evaluation?

A: If you choose to attach documents, make sure to notify your leader that you have uploaded documents for their review, as there is no automatic notification to your leader.

STEP 1 OF 4:
From the Home Page of Success Factors, find the box labeled “My Info”, and click on the wheel:
STEP 2 OF 4:
Next, in the box labeled “My Info Links”, click on Profile:

STEP 3 OF 4:
Click on the Edit button in the Document Attachments box (*Note: The text of the actual Edit button in SuccessFactors is white, and difficult to see. Text color has been edited for the purposes of this FAQ.)*:

STEP 4 OF 4:
Click on the plus sign to add a document:
Q: I haven’t finished my self-evaluation but now I can’t see the evaluation in my queue.

A: Self-evaluations are scheduled to automatically forward to your leader the day following the due date. It is very important to complete the evaluation by the date it is due. If you are not able to complete the evaluation and it auto-moves to your leader, contact them and request additional time to complete it.

Q: Where is the Save button on the self-evaluation?

A: There are two ways to save the document.

**OPTION 1 OF 2:**
First, you can click on the Save icon at the top of the page:

![Save icon at top of page](image)

**OPTION 2 OF 2:**
Or, you can click Save and Close or Send to (leader name) at the bottom of the document:

![Save and Close, Close Without Saving, Send To buttons](image)
Q: How do I sign my evaluation?
A: SuccessFactors utilizes electronic signatures. You complete the electronic signature by clicking on the “Employee Signature” button in the route map at the top.

Q: How do I print my evaluation?
A: Follow the steps below to print your evaluation:

STEP 1 OF 6:
Click on the print icon at the top left of the page.
STEP 2 OF 6:
In the pop-up box that appears after you click print, click on Show Form.

STEP 3 OF 6:
Click on the “gear” icon at the top of the page.
STEP 4 OF 6:
Click on Print and then Print Preview.

STEP 5 OF 6:
Change the 100% view to 85% view.

STEP 6 OF 6:
Click on the Print icon.