

Using SuccessFactors during PRD Cycle

Adding Goals – both for work priorities and your development plan

For: All Staff.

PRD Phase:	Goal Setting	Ongoing Conversations	Year End Review
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Task

Managers/supervisors can cascade Performance goals to individual or multiple staff within their area. The Goal(s) that are to be cascaded need to be created prior to cascading. If you haven't done so please follow "Guide – SuccessFactors – PRD Goal Setting" to add your own Performance Goals.

Outcome

Performance Goals are cascaded to one or more individuals in your team.

In SuccessFactors

[You have logged in to SuccessFactors](#) and are viewing your 'Home' dashboard.

Cascading a Performance Goal

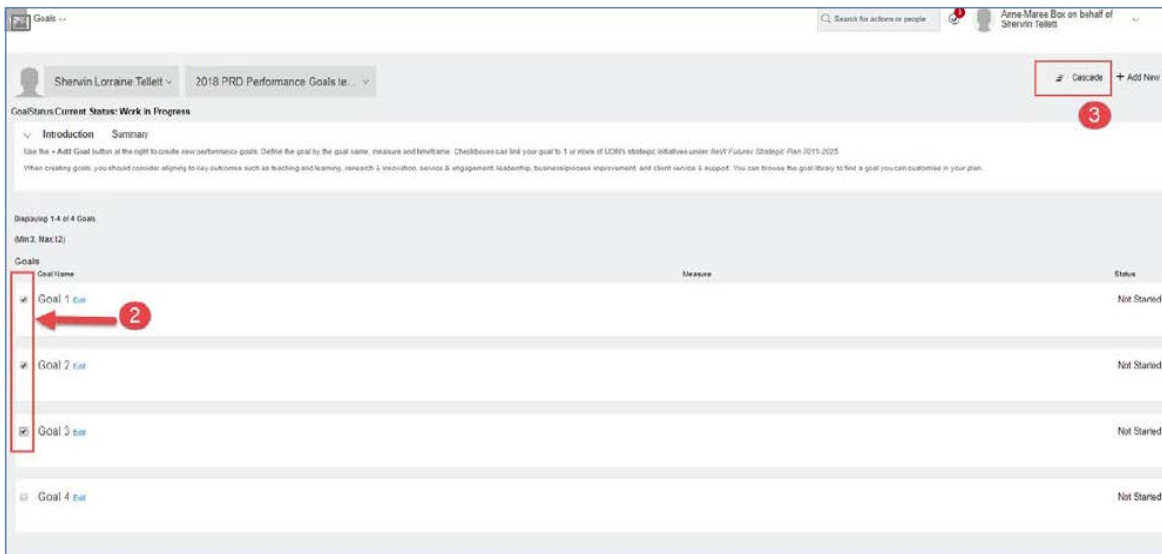
1: Click on the 'Home' drop down menu in the top left corner of your screen and select 'Goals'.

The Performance Goal form will load. Ensure you have '2019 Performance Goals' selected in the drop down (2018 will be there as well).

The screenshot shows the SuccessFactors interface. At the top left, there is a 'Home' dropdown menu with options: Home, Goals, PRD Plan, Ongoing Conversations, Development, Company Info, and My Employee File. The 'Goals' option is highlighted. Below this, the 'Goals' page is displayed for user 'Crystal Poulson'. The '2019 Performance Goals' dropdown is selected, and the '2019 Performance Goals' option is highlighted with a red circle. The page includes an '+ Add Goal' button, 'Actions', and 'Display Options'.

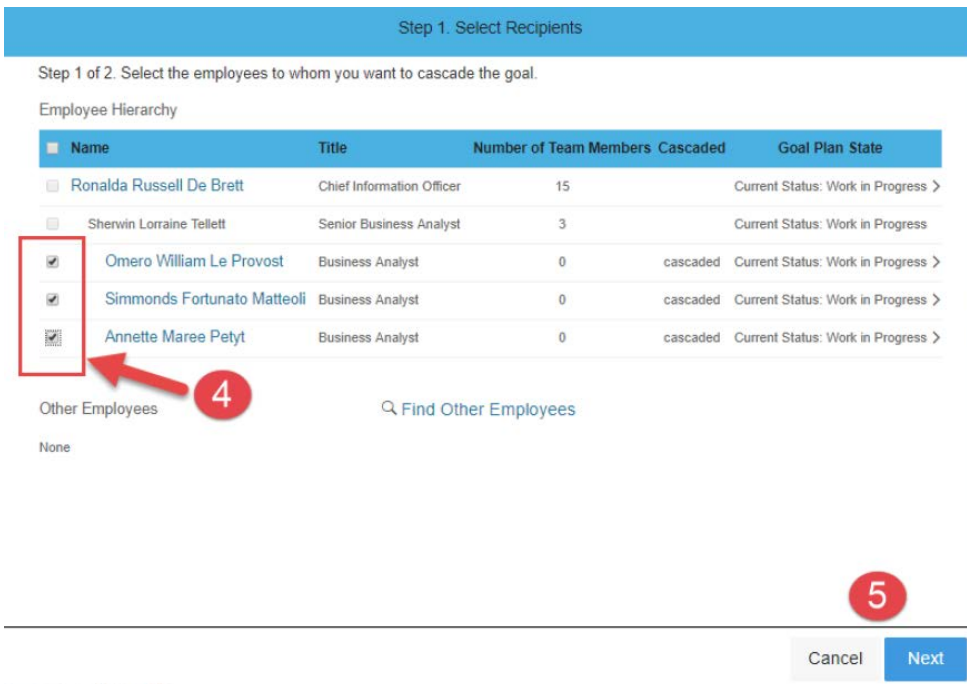
2: You will see your Performance Goals listed. Select the Performance Goals that are to be cascaded to your employee(s).

3: Select 'Cascade'.



4: Select the Employee(s) to cascade the Performance Goal(s) to.

5: Click 'Next'.

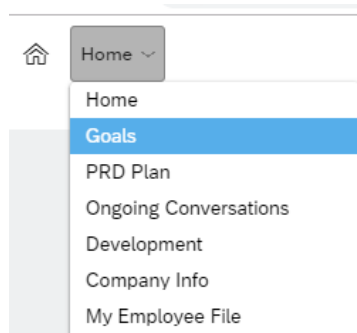


6: Edit any part of the Goal if required

7: Click on Cascade. The Performance Goal(s) will now cascade to the employee(s). Note this may take a few minutes to update in Employee(s) Performance Goals.

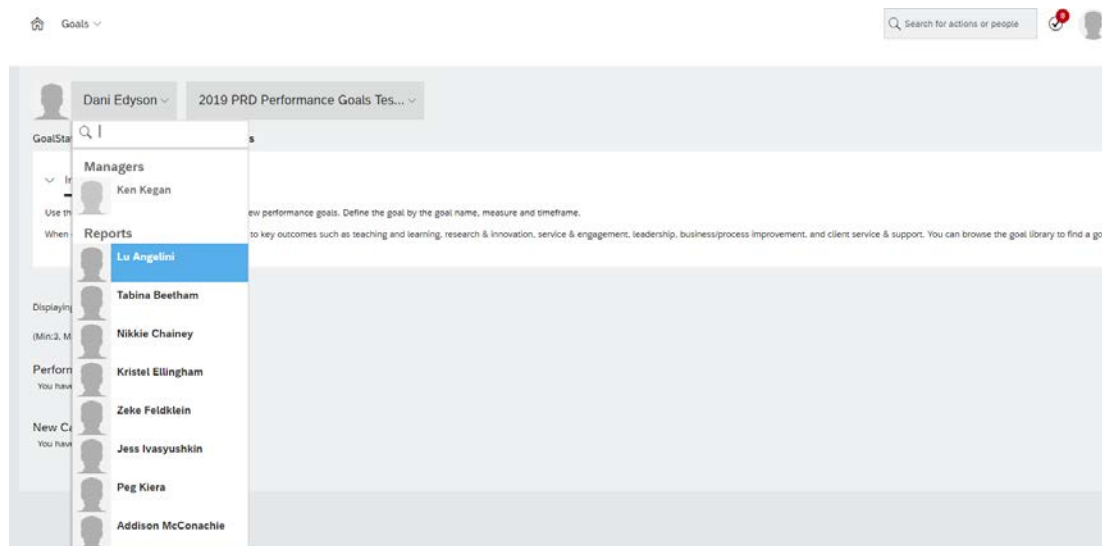
Viewing Employees Performance Goals

1: Click on the 'Home' drop down menu in the top left corner of your screen and select 'Goals'.



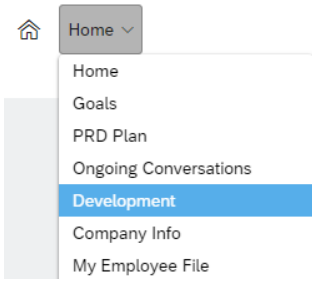
2: The Development Goal form will load. Ensure you have '2019 Development Goals' selected in the drop down (2018 will be there as well).

3: Click on your name at the top, you will see a list of your Reports displayed. Select the employee you would like to view. You will then be able to view the Development Goals they have entered, and edit if required.



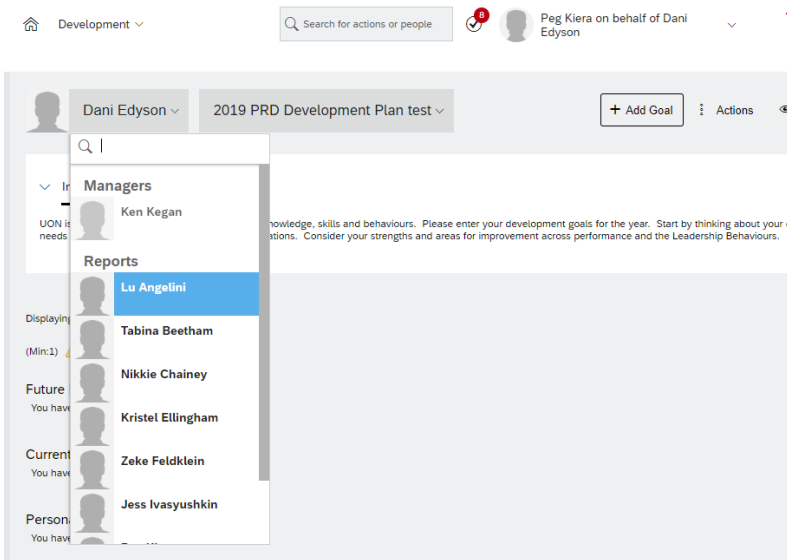
Viewing Employees Development Goals

1: Click on the 'Home' drop down menu in the top left corner of your screen and select 'Development'.



2: The Development Goal form will load. Ensure you have '2019 Development Goals' selected in the drop down (2018 will be there as well).

3: Click on your name at the top, you will see a list of your Reports displayed. Select the employee you would like to view. You will then be able to view the Development Goals they have entered, and edit if required.



Note: If you do not see a Direct Report listed in your drop down list, you can also search for them in the search bar at the top of the screen. Click on their name to display their Employee File. From here you can click the "Actions" button on the top right side and select 'Goal Plan' or 'Development Plan' which will take you to their Goals.

