



Tutorial 2
Using the
performance
review
application

January 2024

1. Background
2. Performance review dashboard
3. Navigating through the application
4. Key features

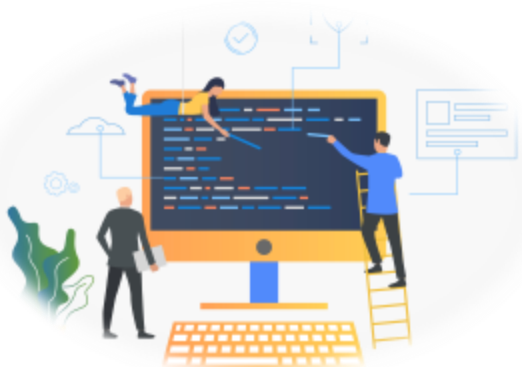


1. Background

This tutorial will show you how to make your way through EPFL's new performance review application. It's one of a series of tutorials designed to help you use the software's many features.

To learn more about the overall performance review process or specific steps of the process, we suggest you have a look at one of the other tutorials in the series. A list is given at the end of this presentation.

By the end of this tutorial, we hope you'll have learned how to:



- ✓ Get started in the new application and open its various pages
- ✓ Make your way around the application
- ✓ Use it effectively thanks to our helpful tips

Why are performance reviews important?

1

Give direction to employees



2

Help develop their skills



3

Recognize their efforts



Performance reviews, together with new features in EPFL's HR system, allow for ongoing dialogue between managers and employees.

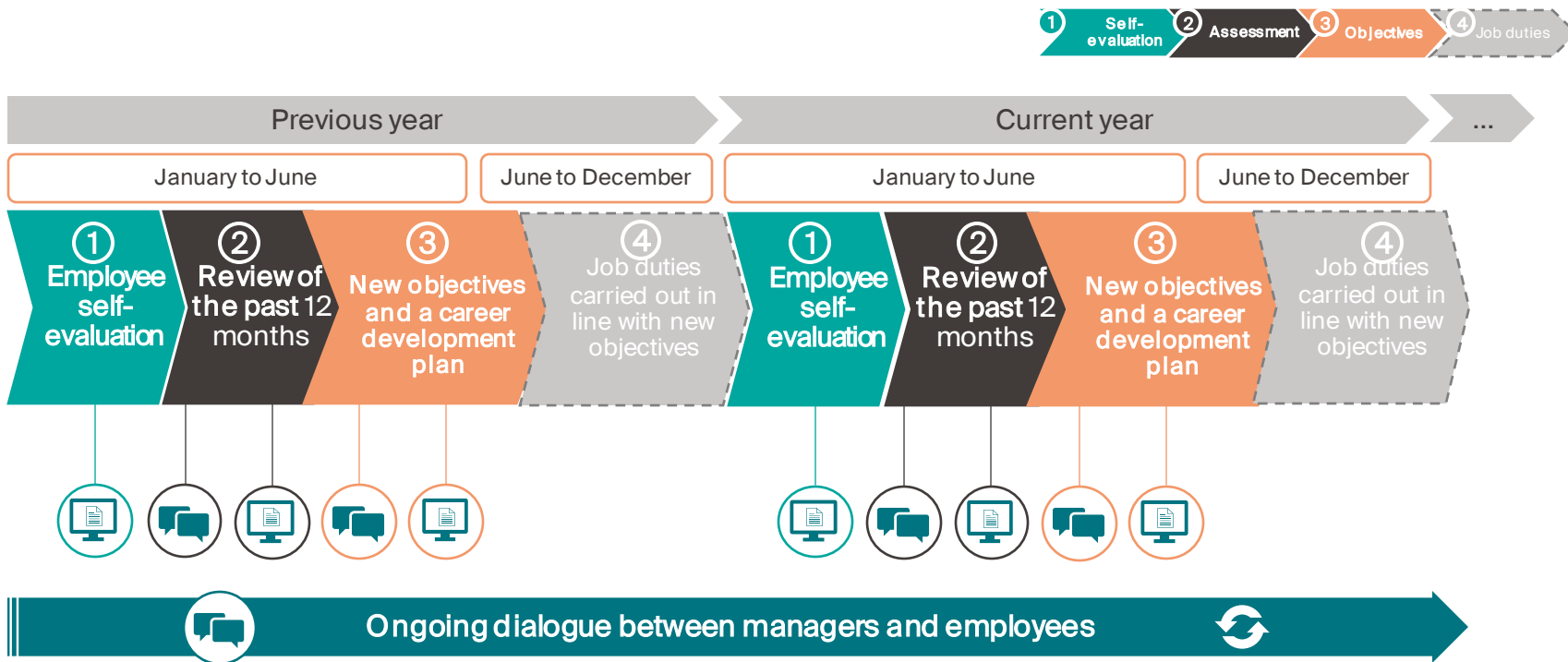


Discuss **past events** and learn about employees' experiences and achievements.




Look to the **future** by setting objectives and mapping out a career development plan.

Assessments over 12 months



Legend

 Steps that must be entered into EPFL's HR system and confirmed using the performance review application

 Steps involving discussion between managers and employees

Good morning!

Quick Actions

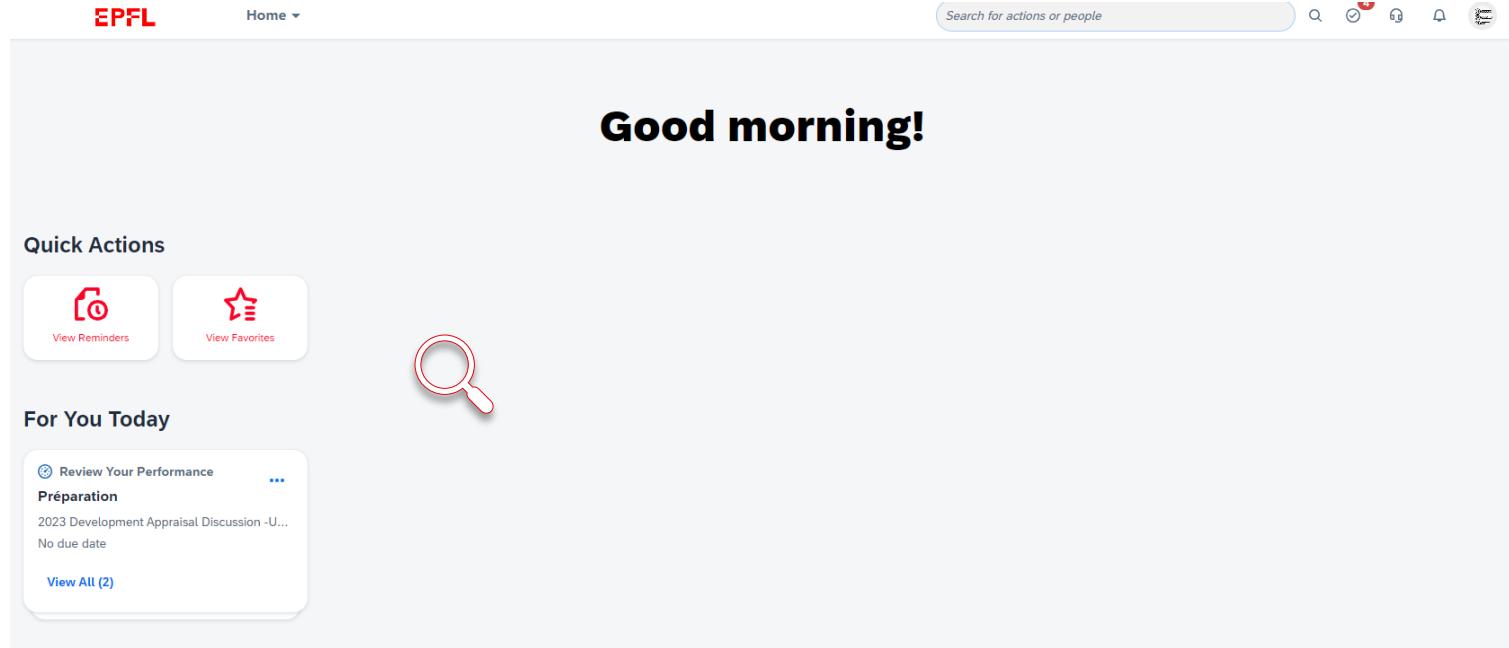


View Reminders



View Favourites

2. Performance review dashboard



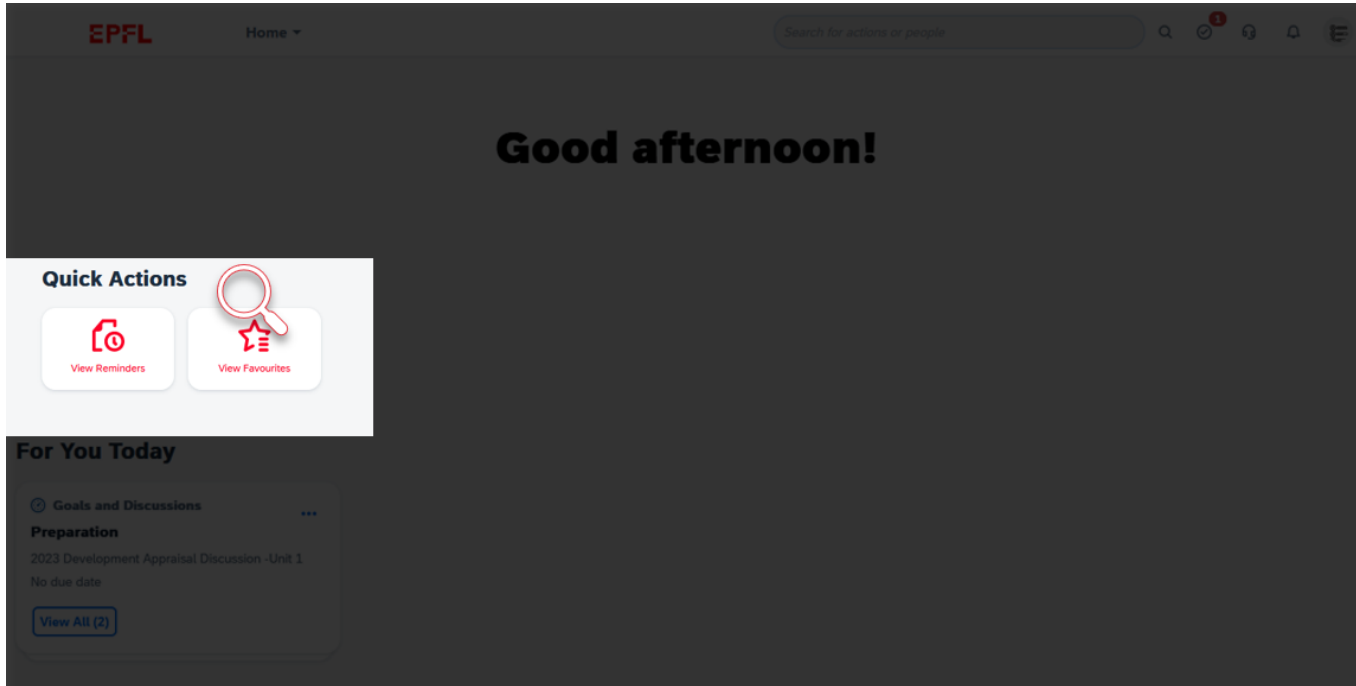
The screenshot shows the EPFL Home page dashboard. At the top left is the EPFL logo. To its right is a 'Home' dropdown menu. On the far right of the top bar is a search bar with the placeholder text 'Search for actions or people' and several utility icons (search, refresh, help, notifications, and a profile icon). The main content area features a large 'Good morning!' greeting. Below this, there are two 'Quick Actions' buttons: 'View Reminders' (with a calendar icon) and 'View Favorites' (with a star icon). A magnifying glass icon is positioned between these buttons and the 'For You Today' section. The 'For You Today' section contains a card for 'Review Your Performance' with a sub-section titled 'Préparation' for a '2023 Development Appraisal Discussion -U...' with 'No due date'. A 'View All (2)' link is at the bottom of the card.

The home page (or dashboard) is your starting point for navigating through the application. You'll need to enter your EPFL user name and password to open this page.

Either "Good morning" or "Good afternoon" will appear depending on the time of day.

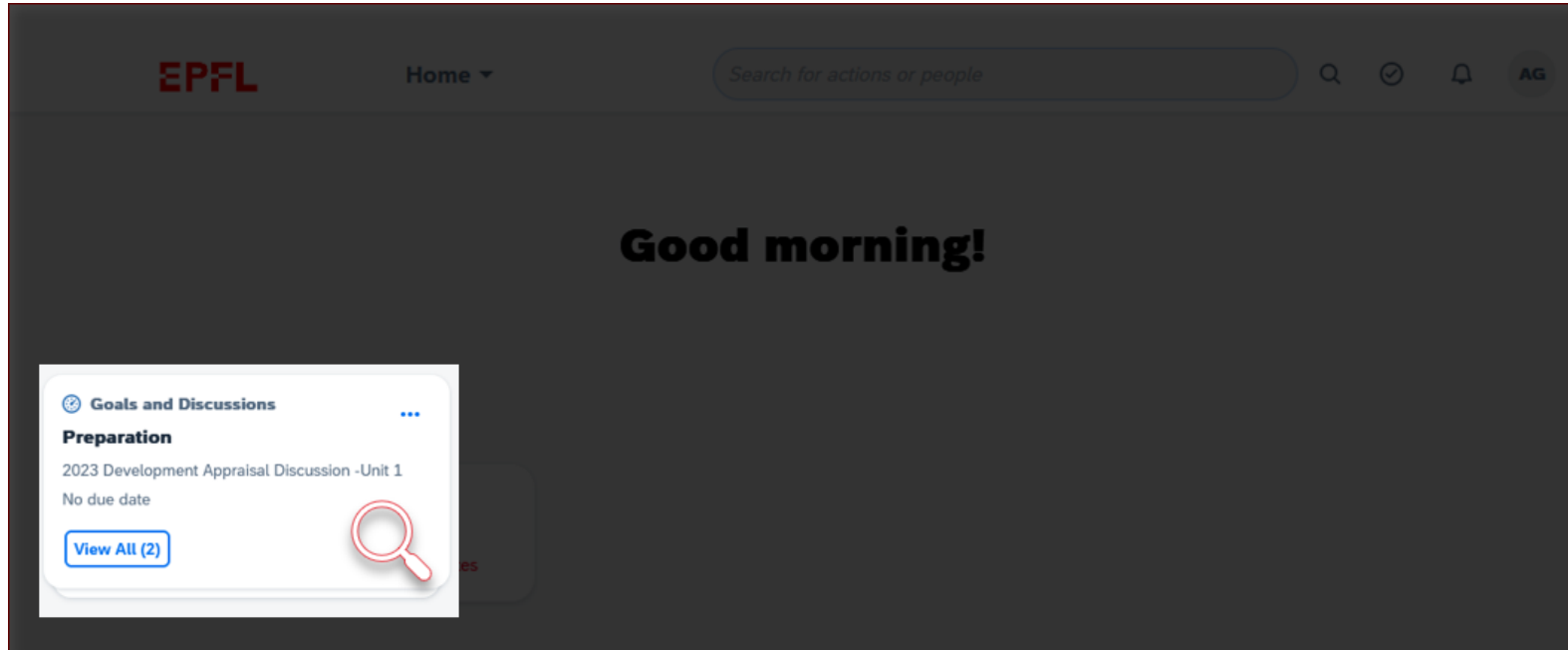
The screenshot displays the EPFL dashboard interface. At the top left is the EPFL logo and a 'Home' dropdown menu. A search bar is located at the top right with the placeholder text 'Search for actions or people'. The main heading in the center reads 'Good afternoon!'. Below this, a 'Quick Actions' section features two buttons: 'View Reminders' (with a clock icon) and 'View Favourites' (with a star icon). A magnifying glass icon is positioned over the 'View Favourites' button. The 'For You Today' section below contains a card for 'Goals and Discussions' with a sub-section for 'Preparation' listing '2023 Development Appraisal Discussion -Unit 1' and 'No due date', with a 'View All (2)' button.

The Quick Action buttons in the middle of the dashboard let you jump quickly to the actions you'll perform most often.

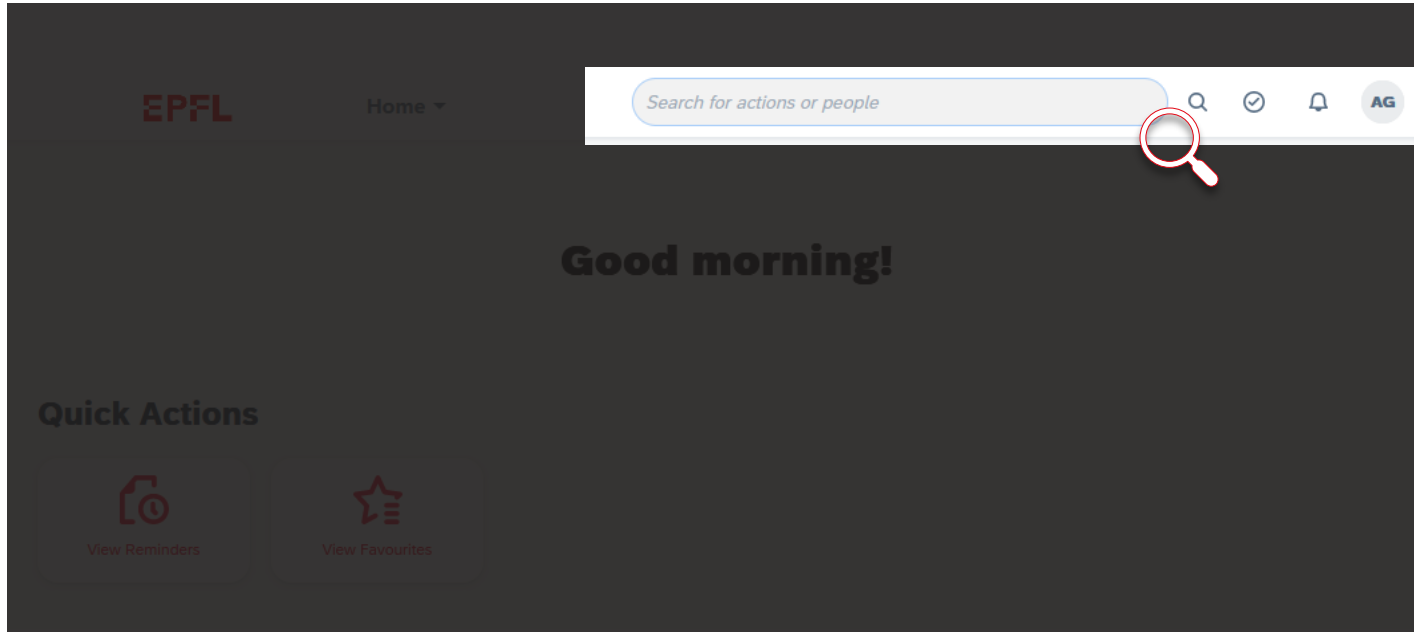


The screenshot shows the EPFL user interface. At the top left is the EPFL logo and a 'Home' dropdown menu. A search bar contains the text 'Search for actions or people'. The main heading is 'Good afternoon!'. Below this is a 'Quick Actions' section with two buttons: 'View Reminders' (with a clock icon) and 'View Favourites' (with a star icon). Below that is a 'For You Today' section with a 'Goals and Discussions' header and a 'Preparation' task titled '2023 Development Appraisal Discussion - Unit 1' with 'No due date' and a 'View All (2)' button.

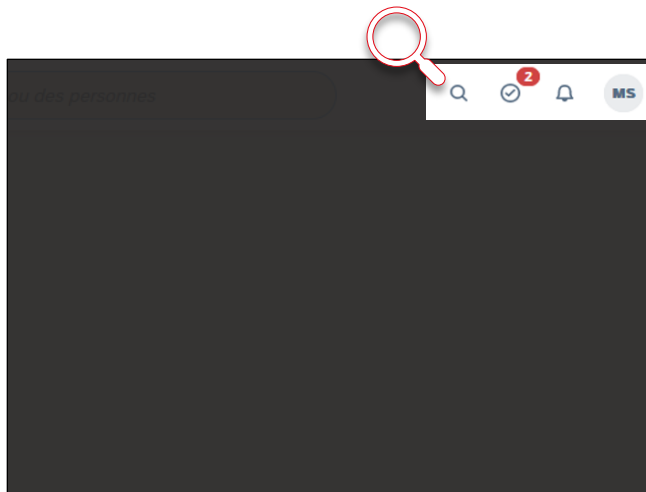
- **View reminders**
Click on this button to view the reminders you've set (they'll appear the day after you set them).
- **View favourites**
This button lets you directly open the pages you've identified as favourites.



The reminder window is located in the lower left corner of the dashboard. It shows any ongoing tasks that need to be completed.

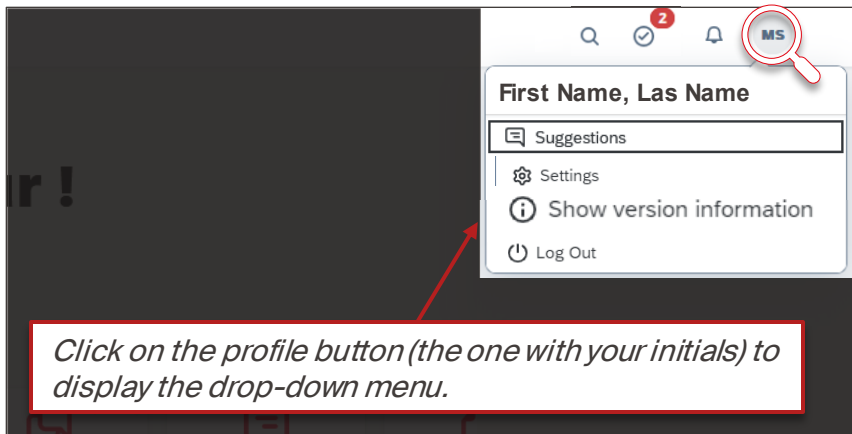


With the toolbar in the upper right corner of the dashboard, you can quickly access a number of features and manage your settings.

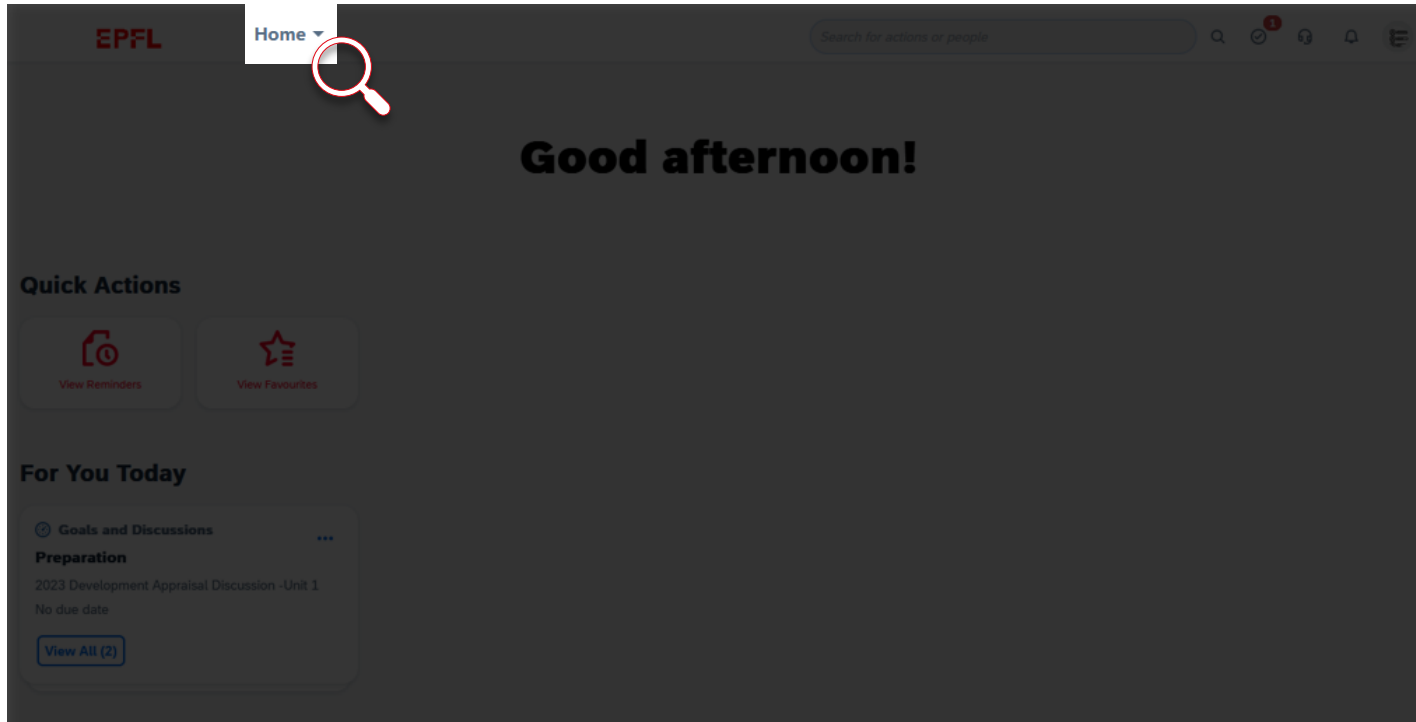


On the toolbar, you'll find (left to right):

- **Search bar**
Use this to search for actions or people in the application
- **Tasks**
View your outstanding tasks
- **Alerts**
View your alerts
- **Profile**
Described on the next slide



- **Suggestions**
Lets you suggest improvements to the system developer
- **Settings**
Lets you personalize the application (alerts, language, etc.)
- **Version information**
Displays information on the current SAP version
- **Logout**

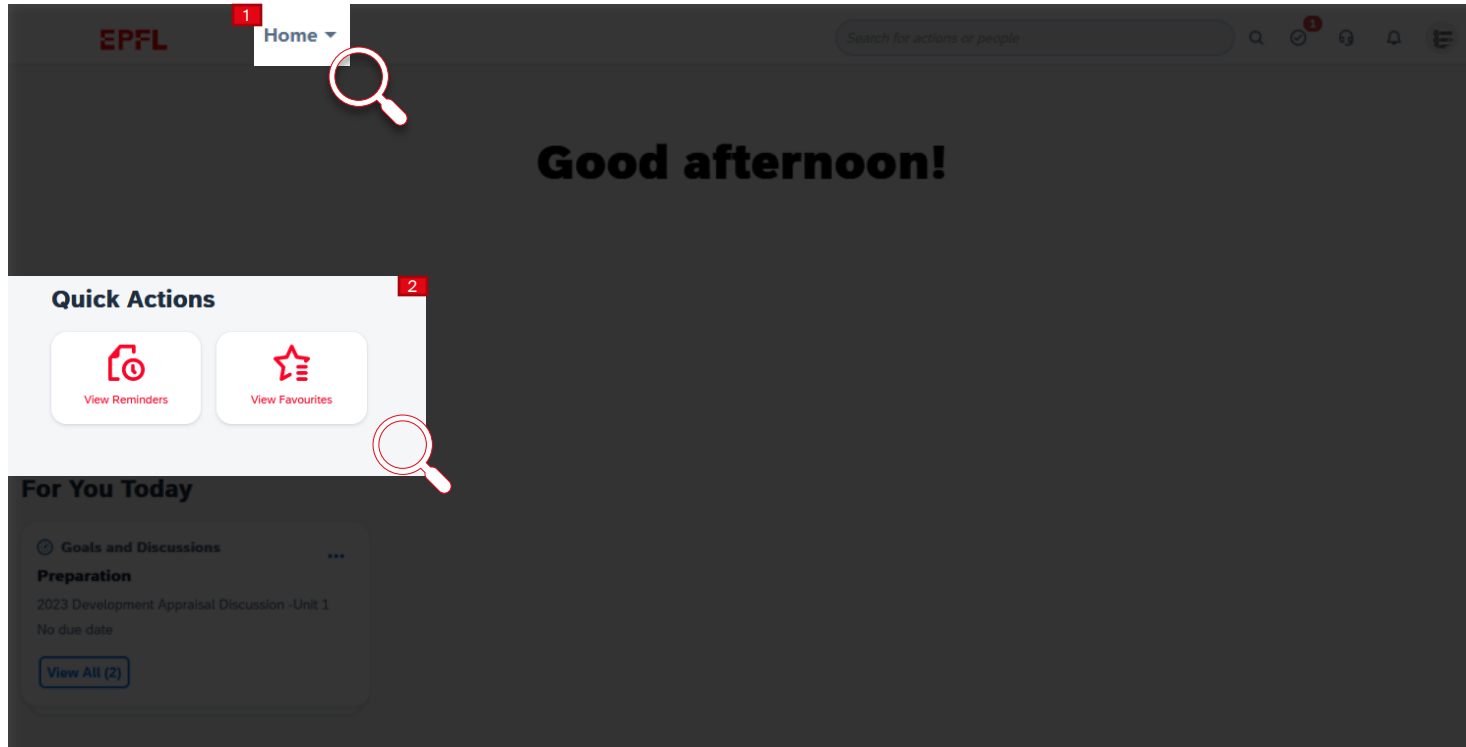


Click on “Home” to display the drop-down menu of the different pages you can open.

[More on these pages later.](#)

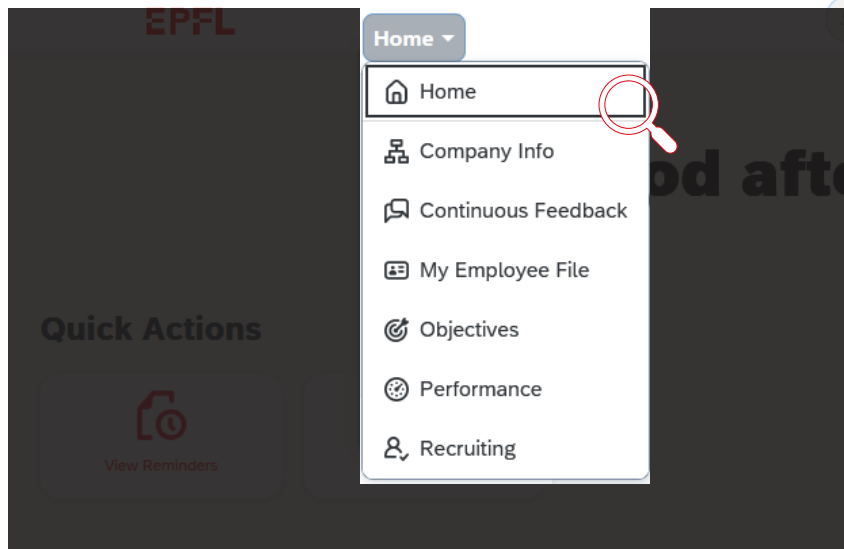


3. Navigating through the application



There are two methods you can use to navigate through the application from the home page:

- the pages menu that appears when you click on “Home”
- the Quick Action buttons in the middle of the dashboard



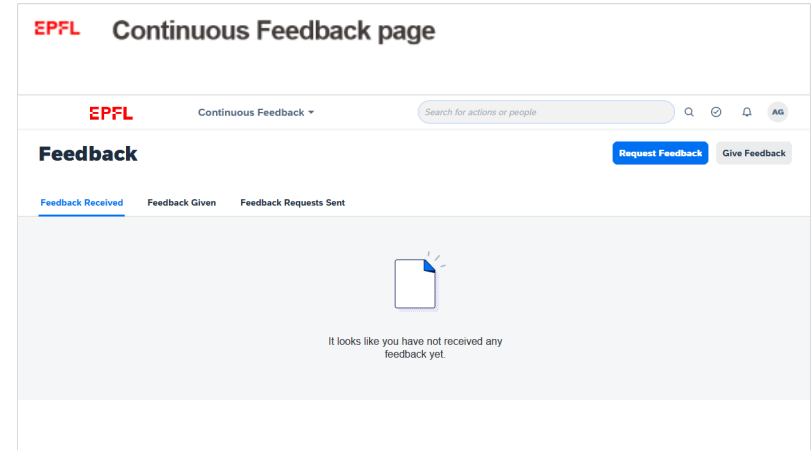
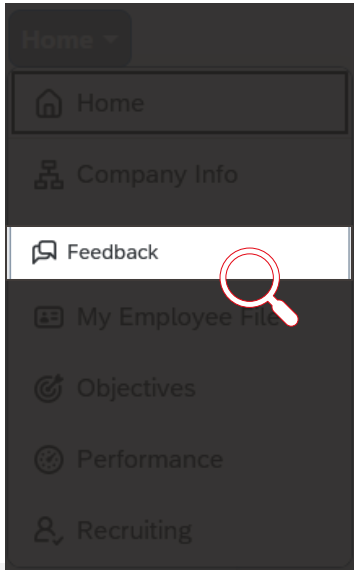
The drop-down menu appears when you click on “Home.”

- **Home**
The main page (dashboard) with buttons to access the various features.
- **Company Info**
Shows your unit’s organizational chart and a directory of EPFL employees. *This feature will be added in a subsequent update.*
- **Continuous Feedback**
Opens a page summarizing the feedback you’ve given, received and requested. You can also request feedback from this page.
- **Objectives**
Lists your objectives for the year, for both performance and career development. Managers can also view the objectives of their employees.
- **Performance**
Compiles all your current and past performance review forms. Managers can also view their employees’ forms here.
- **Recruiting**
Displays a dashboard for managing the hiring process in your unit (*to be added*).



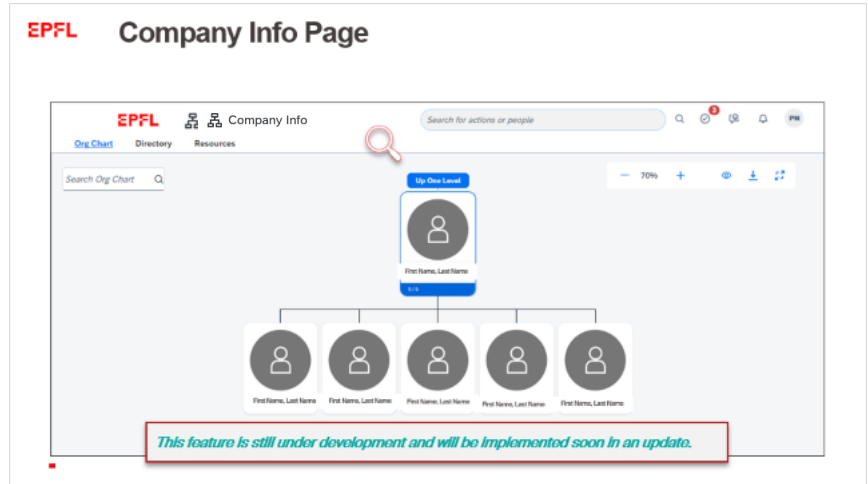
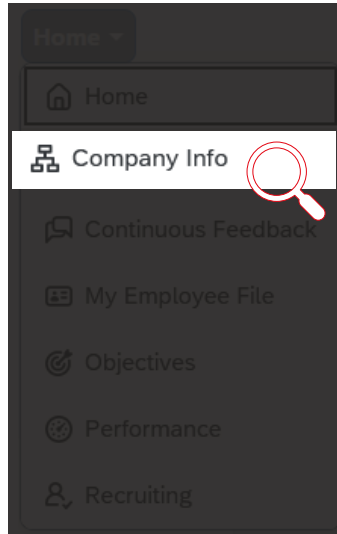
4. Key features

Continuous Feedback page



This page gives an overview of the feedback you've given, received and requested. It also contains two buttons in the upper right corner letting you "Request Feedback" and "Give Feedback" directly.

In Tutorial 5, you'll learn more about how the feedback feature works, for both making requests and providing feedback to colleagues. Managers will also find out how to ask for feedback about one of their employees.



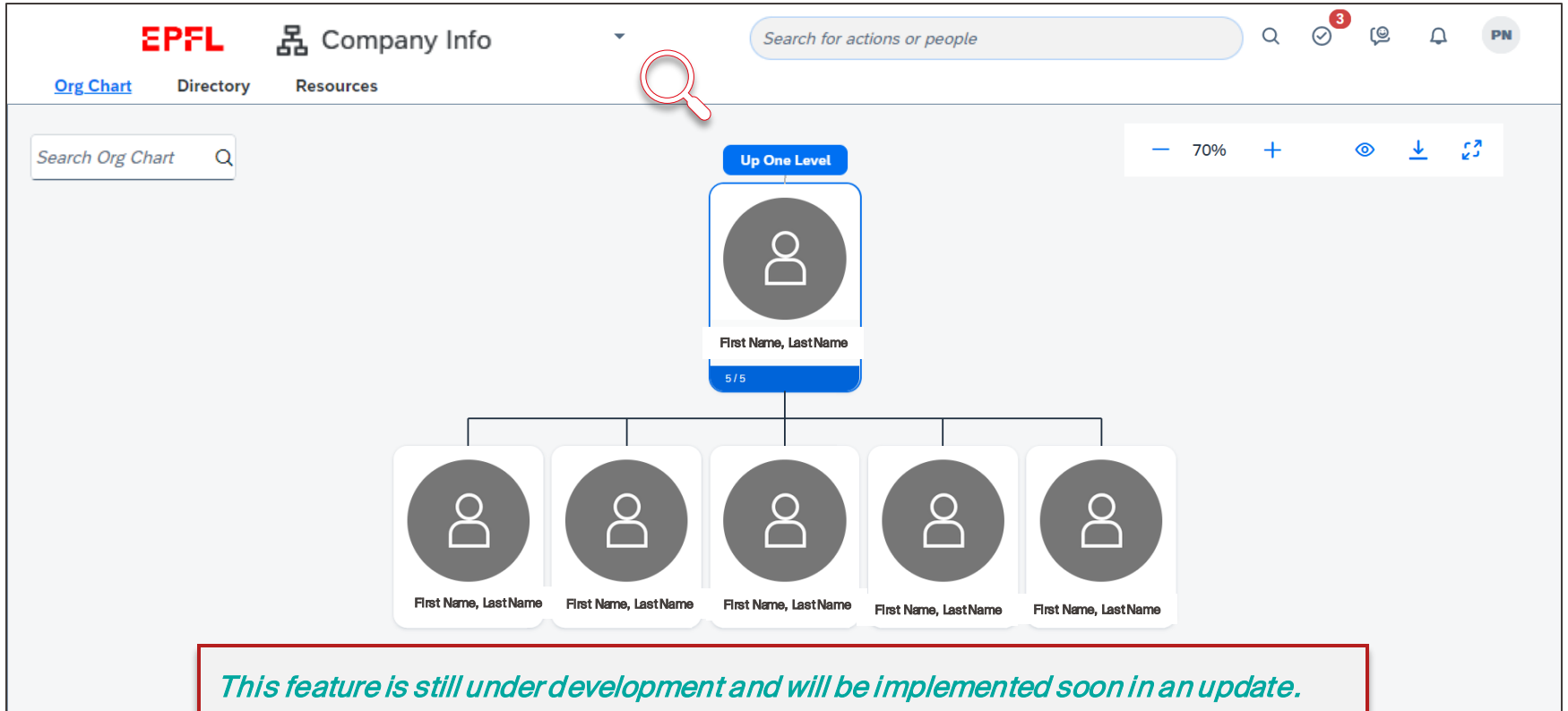
This page shows your unit's organizational chart. If you work for more than one unit, it shows the one for which you have the highest employment rate. You can use this page to see where you fit in the broader picture. The page also contains a directory with a search bar letting you search for any other EPFL employee.

This feature is still under development and will be rolled out soon in an update.

Feedback

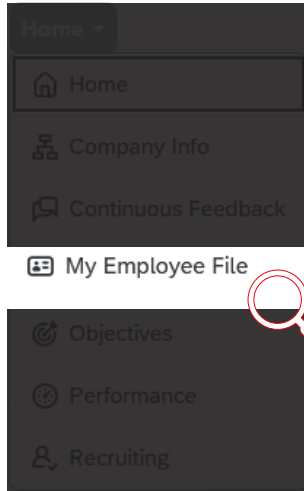
[Request Feedback](#)[Give Feedback](#)[Feedback Received](#)[Feedback Given](#)[Feedback Requests Sent](#)

It looks like you have not received any feedback yet.



The screenshot displays the EPFL Company Info page. The header includes the EPFL logo, the title "Company Info", and navigation links for "Org Chart", "Directory", and "Resources". A search bar is present with the placeholder text "Search for actions or people". The main content area shows an organizational chart with a central node labeled "Up One Level" and five sub-nodes, each labeled "First Name, LastName". A red magnifying glass is positioned over the search bar. A red box at the bottom of the page contains the text: "This feature is still under development and will be implemented soon in an update."

My Employee File Page



EPFL My Employee File Page

First Name, Last Name

30%
Your profile is incomplete.

Profile Talent Profile


User Info		Personal Information	Identification
First Name	Gemma	Last Name	Izquierdo Pardo
Gender	Female	Date of Birth	26 Apr 1991
Nationality	Espagne	User ID	00064467
		Username	SCIPER
		Default L	

Contact Information		Work Location	Contact
Address Line 1	1015 Lausanne	Address Line 2	-
City	Lausanne	State	Vaud
Postal Code	1015	Country/Region	-
Email	andrea.trinle@epfl.ch	Business Phone	----- Show

Show More

This page lists all the information in your profile broken down by category, including past performance review forms and employee mobility requests. Managers can use this page to view the employee mobility requests made by their employees.

My Employee File Page



First Name, Last Name
Généraliste RH
RRH-GE, RRH
Lausanne (Europe/Berlin)
Local time: Thursday, 14:22:09
andre.trinle@epfl.ch

[Actions](#) [Header](#)

30%
Your profile is incomplete.
[Finish Now](#)

[Profile](#) [Talent Profile](#)

User Info

Personal Information [✎](#)

First Name
Last Name
Gender
Date of Birth
Nationality

Identification [✎](#)

User ID
Username
SCIPER
Default Locale

Contact Information

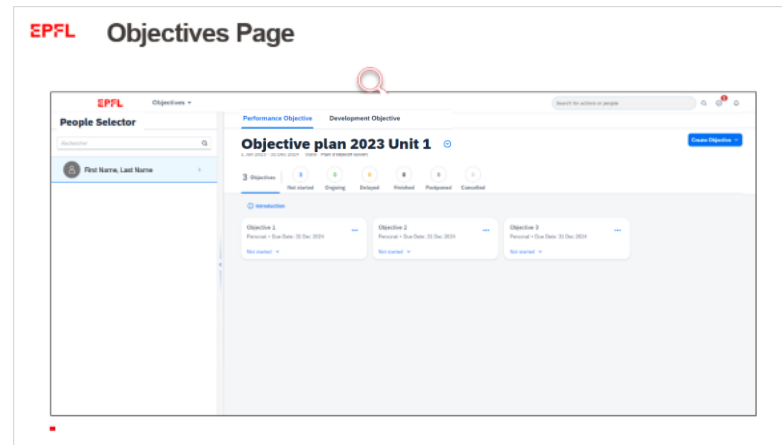
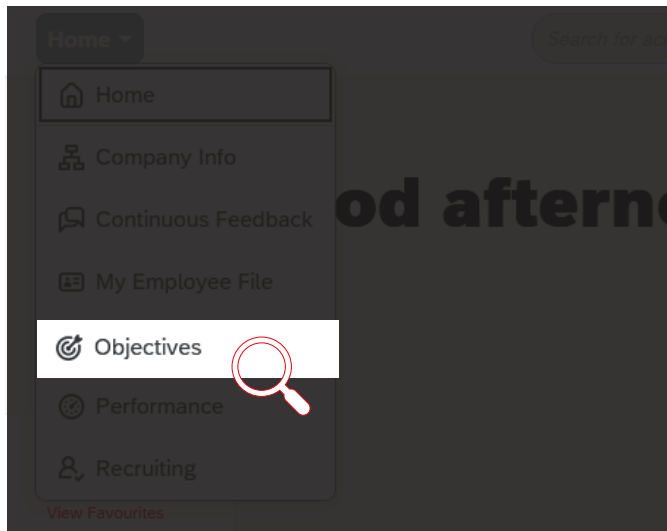
Work Location [✎](#)

Address Line 1
Address Line 2
City
State
Postal Code
Country/Region -

Contact [✎](#)

Email
Business Phone

[Show More](#)



This page lists your performance and career-development objectives for the year, and lets you enter new objectives. You can also use this page to track progress on your objectives.

In Tutorial 4, you'll learn more about using this page to help set your full-year objectives.



EPFL Objectives ▾ Search for actions or people 🔍 1 🔔

People Selector

Rechercher 🔍

First Name, Last Name >

Performance Objective | Development Objective

Objective plan 2023 Unit 1 🕒

1 Jan 2023 - 31 Dec 2024 State: Plan d'objectif ouvert Create Objective ▾

3 Objectives

3	0	0	0	0	0
Not started	Ongoing	Delayed	Finished	Postponed	Cancelled

🕒 Introduction

Objective 1 ⋮

Personal • Due Date: 31 Dec 2024

Not started ▾

Objective 2 ⋮

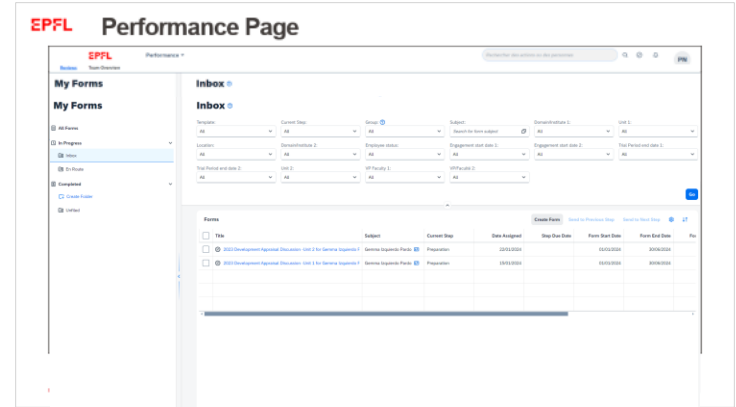
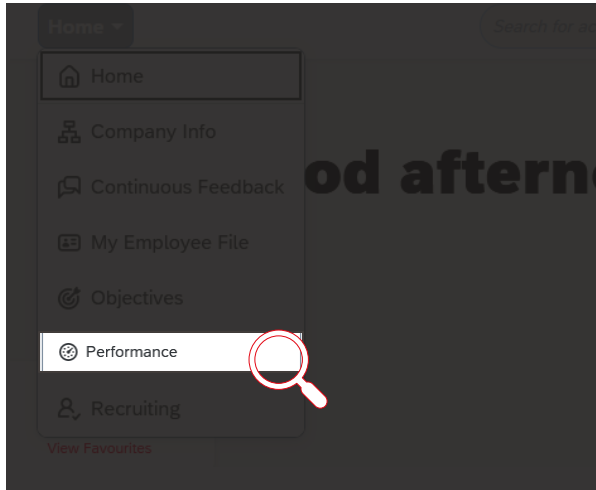
Personal • Due Date: 31 Dec 2024

Not started ▾

Objective 3 ⋮

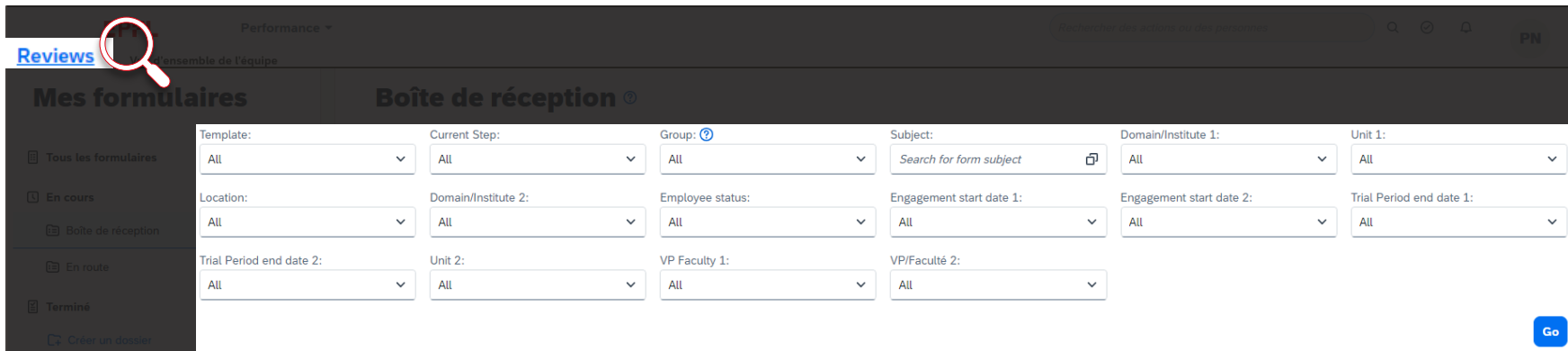
Personal • Due Date: 31 Dec 2024

Not started ▾



On this page, you'll find a compilation of all your current and past performance review forms (under the Reviews tab), including the forms for setting objectives. Managers can view the forms for each of their employees (under the Team Overview tab). The page opens directly on your Inbox where all your current forms are displayed.

In Tutorial 3, you'll learn more about how to use the application for your appraisal discussions and performance-review forms.



Performance

Reviews

Mes formulaires

Boîte de réception

Template: All

Current Step: All

Group: All

Subject: Search for form subject

Domain/Institute 1: All

Unit 1: All

Location: All

Domain/Institute 2: All

Employee status: All

Engagement start date 1: All

Engagement start date 2: All

Trial Period end date 1: All

Trial Period end date 2: All

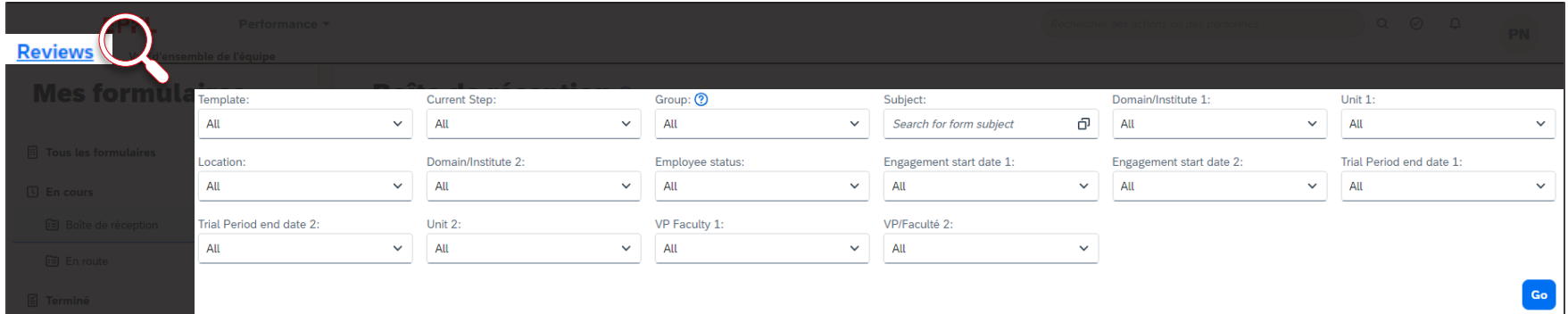
Unit 2: All

VP Faculty 1: All

VP/Faculté 2: All

Go

Your Inbox contains a list of all your current forms, which you can sort by different filters: the type of form (or “Template:” performance review or objectives form), “Current Step” in the process, “Subject,” or “Domain/Institute.”



Performance

Reviews

Ensemble de l'équipe

Mes formulaires

Tous les formulaires

En cours

Boîte de réception

En route

Termine

Template: All

Current Step: All

Group: All

Subject: Search for form subject

Domain/Institute 1: All

Unit 1: All

Location: All

Domain/Institute 2: All

Employee status: All

Engagement start date 1: All

Engagement start date 2: All

Trial Period end date 1: All

Trial Period end date 2: All

Unit 2: All

VP Faculty 1: All

VP/Faculté 2: All

Go

The other filters can be seen by all employees but they're useful only to managers. The domains and institutes, for example, that appear in the list will depend on your specific role.



Managers

You can use the “Domain/Institute,” “Unit,” “Location,” “Employee Status,” “Engagement Start Date,” “Trial Period End Date,” and “VP/Faculty” filters to sort the forms for your employees.



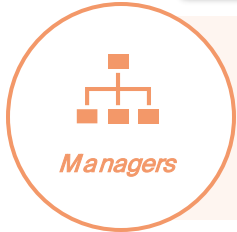
EPFL Performances

Reviews [Team Overview](#)

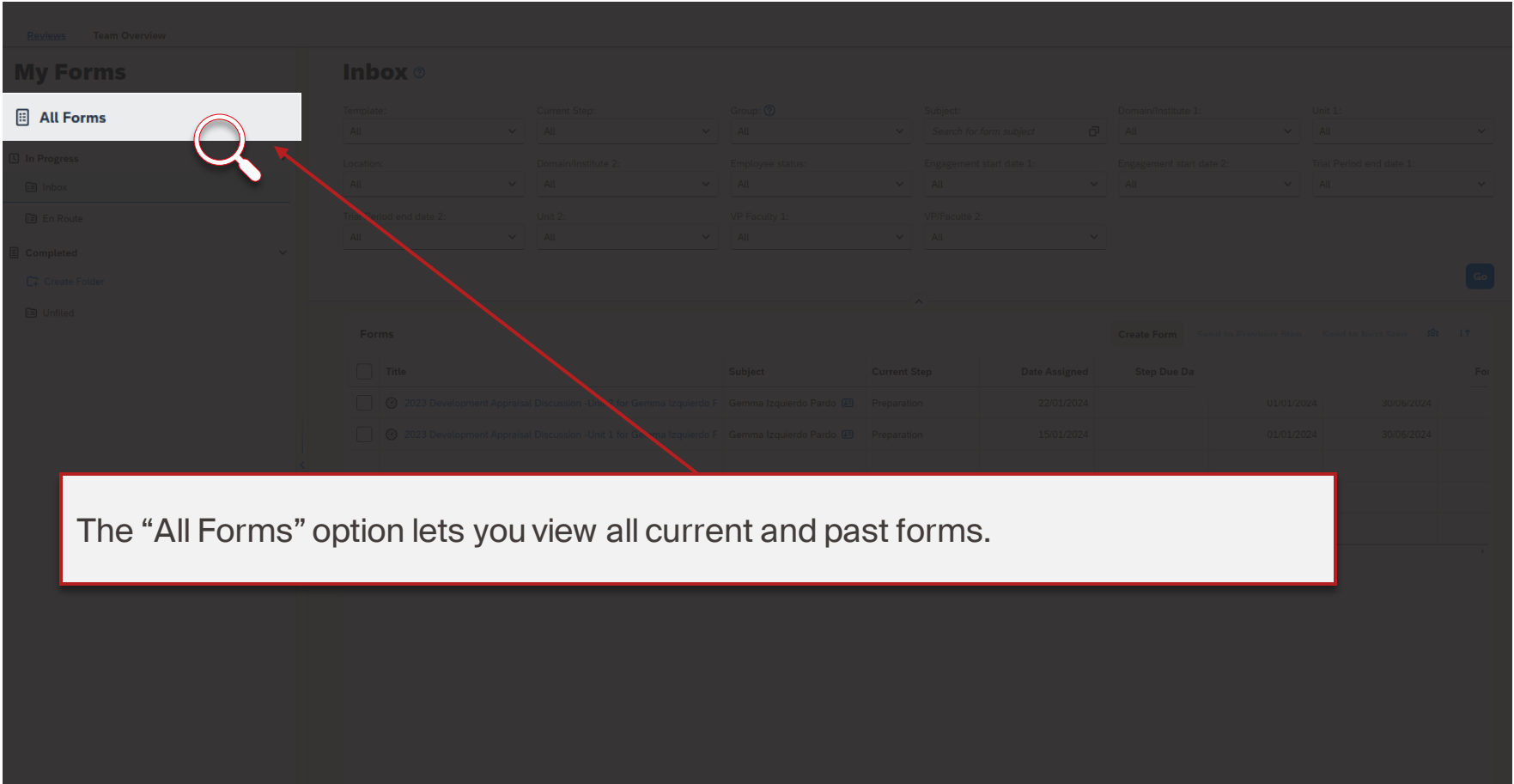
No final assessment action is required at the moment

You do not have any forms that need your attention at the moment. Please try again later.

This page will change during the year depending on what step you're at in the performance review process.



Under the Team Overview tab, you can see the performance review status for each of your employees.



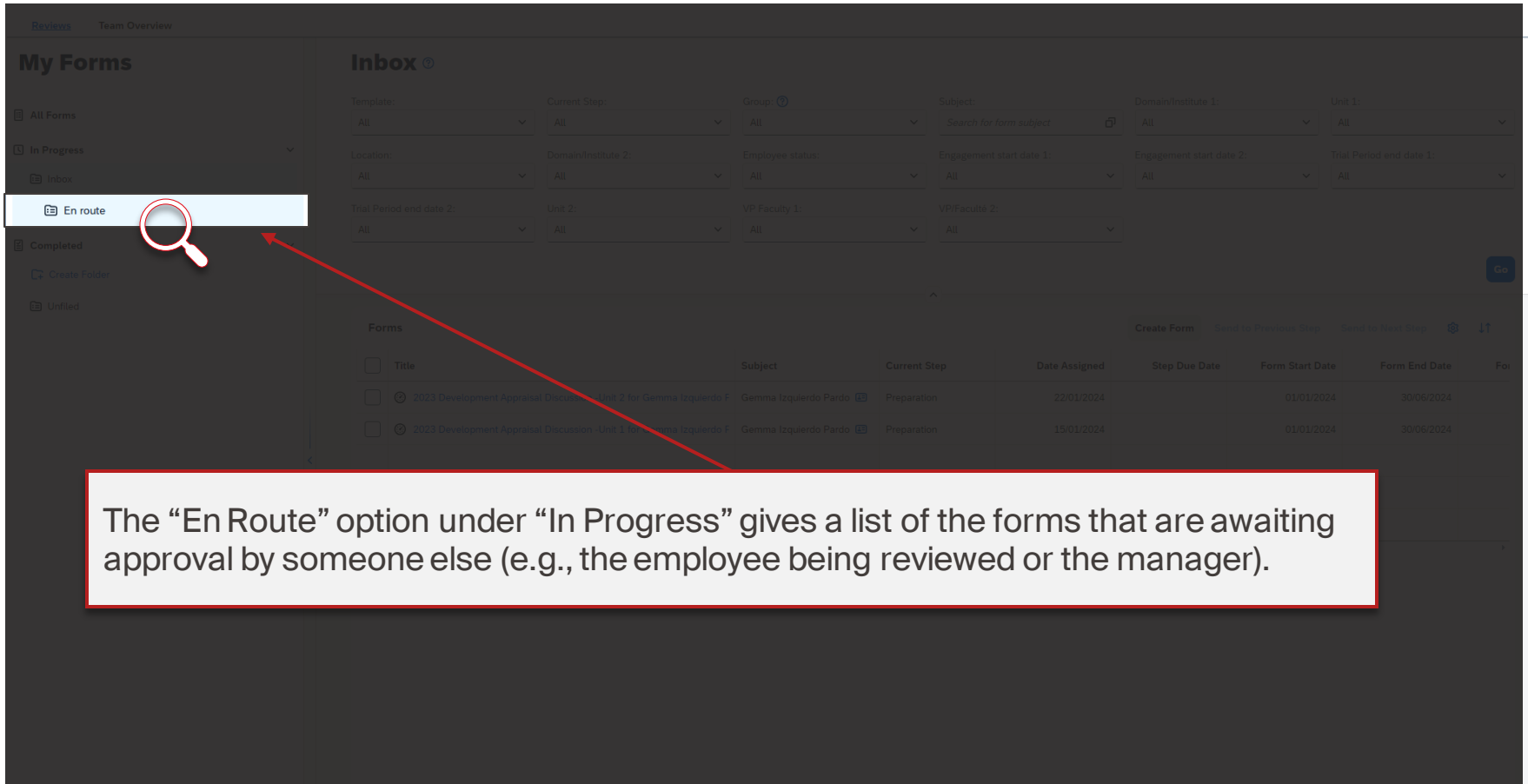
The screenshot displays the 'My Forms' sidebar on the left, which includes options for 'All Forms', 'In Progress', 'Inbox', 'En Route', 'Completed', 'Create Folder', and 'Unified'. The 'All Forms' option is highlighted with a red magnifying glass. A red arrow points from this option to a text box at the bottom of the page.

The main content area shows an 'Inbox' table with columns for Template, Current Step, Group, Subject, Domain/Institute 1, and Unit 1. Below this is a 'Forms' table with columns for Title, Subject, Current Step, Date Assigned, Step Due Da, and For.

Template	Current Step	Group	Subject	Domain/Institute 1	Unit 1
All	All	All	Search for form subject	All	All
Location	Domain/Institute 2	Employee status	Engagement start date 1	Engagement start date 2	Trial Period end date 1
All	All	All	All	All	All
Trial Period end date 2	Unit 2	VF Faculty 1	VF Faculty 2		
All	All	All	All		

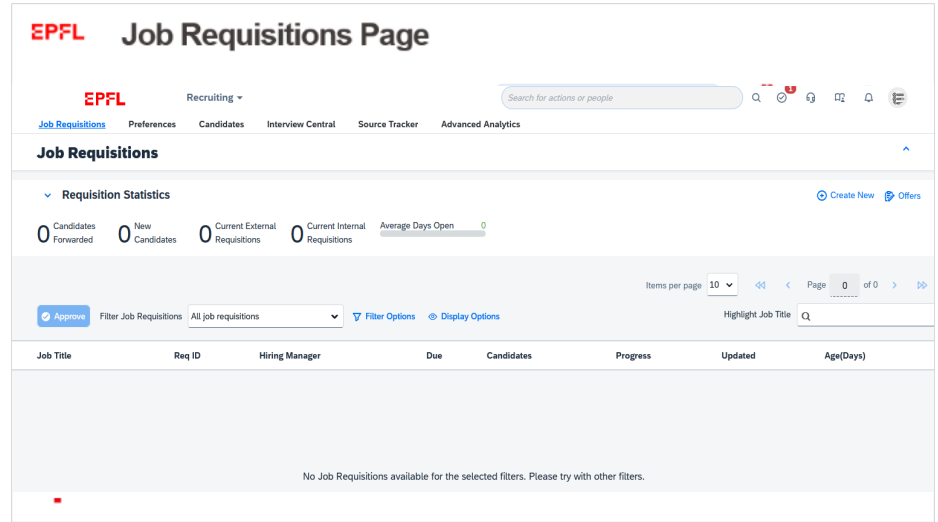
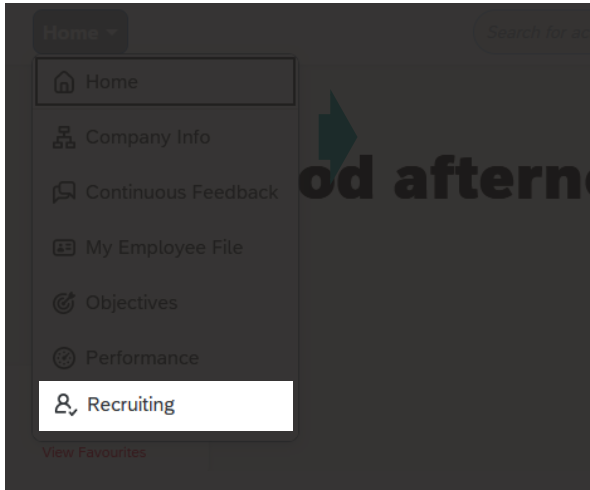
Title	Subject	Current Step	Date Assigned	Step Due Da	For
<input type="checkbox"/> 2023 Development Appraisal Discussion - Unit 1 for Gemma Izquierdo F	Gemma Izquierdo Pardo	Preparation	22/01/2024	01/01/2024	30/06/2024
<input type="checkbox"/> 2023 Development Appraisal Discussion - Unit 1 for Gemma Izquierdo F	Gemma Izquierdo Pardo	Preparation	15/01/2024	01/01/2024	30/06/2024

The “All Forms” option lets you view all current and past forms.



The screenshot shows the 'My Forms' section of the EPFL Performance Page. The 'In Progress' menu is open, and the 'En route' option is highlighted with a magnifying glass. A red arrow points from the magnifying glass to a text box at the bottom of the page.

The 'En Route' option under 'In Progress' gives a list of the forms that are awaiting approval by someone else (e.g., the employee being reviewed or the manager).



This page displays the hiring requests you've made.

Under development; will be available later this year.



Job Requisitions



Requisition Statistics

[Create New](#) [Offers](#)

0 Candidates Forwarded 0 New Candidates 0 Current External Requisitions 0 Current Internal Requisitions Average Days Open 0

Items per page 10 ⏪ < Page 0 of 0 > ⏩

Approve Filter Job Requisitions All job requisitions ▾ [Filter Options](#) [Display Options](#)

Highlight Job Title

Job Title	Req ID	Hiring Manager	Due	Candidates	Progress	Updated	Age(Days)
-----------	--------	----------------	-----	------------	----------	---------	-----------

No Job Requisitions available for the selected filters. Please try with other filters.

Most useful pages

It's unlikely that you'll use all pages in the application on a daily basis. However, the following pages will be useful at various points during the year and especially during the performance review process:

Objectives ▾



Objectives

To set your objectives at the start of the year

Performance ▾



Performance

To track progress on your objectives during the year

Feedback ▾

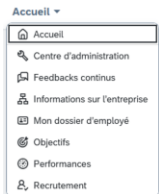


Feedback

To give and receive feedback

Helpful Tips

The following tips will help you get up to speed quickly and use the application effectively.



Use the pages menu to switch between different pages



Add the pages you use most often to your favourites



Check the “For You Today” box every time you log into the application



Fill out your user profile completely so that the application can be as personalized as possible



Tutorials on EPFL's new HR system

Performance review tutorials	
Tutorial 1	The performance review process <i>Now available</i>
Tutorial 2	Using the performance review application <i>Now available</i>
Tutorial 3	Completing the performance review form <i>Now available</i>
Tutorial 4	Completing the objectives form <i>Available from 2 February 2024</i>
Tutorial 5	Giving and receiving feedback <i>Available from 16 February 2024</i>



Now you've got all the tools you need. It's up to you to use them!

We're aware this is a new process, and we'll be here to help you through it.



Questions about using the system? Send an email to tech support at 1234@epfl.ch



Questions about the performance review process? Send us an email at rh@epfl.ch



Building a stronger organization through effective dialogue

