EPFL

Tutorial 2

Using the performance review application

January 2024

École
polytechnique
fédérale
de Lausanne

EPFL

Contents

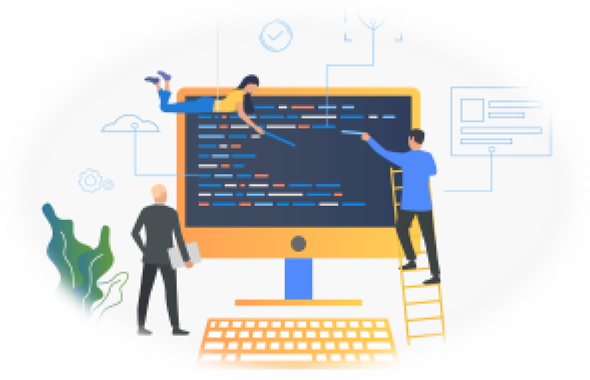
1. Background

Objectives of this tutorial

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

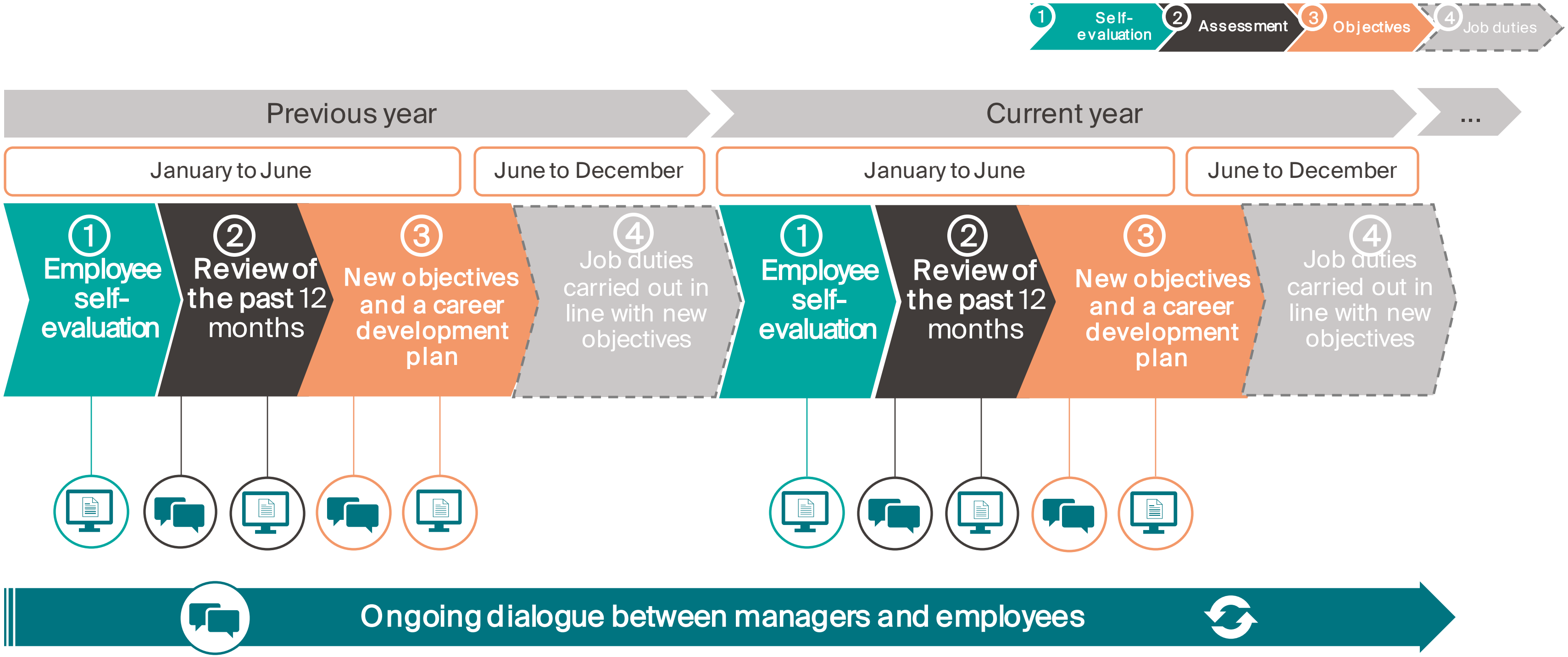
3 Recognize their efforts

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.

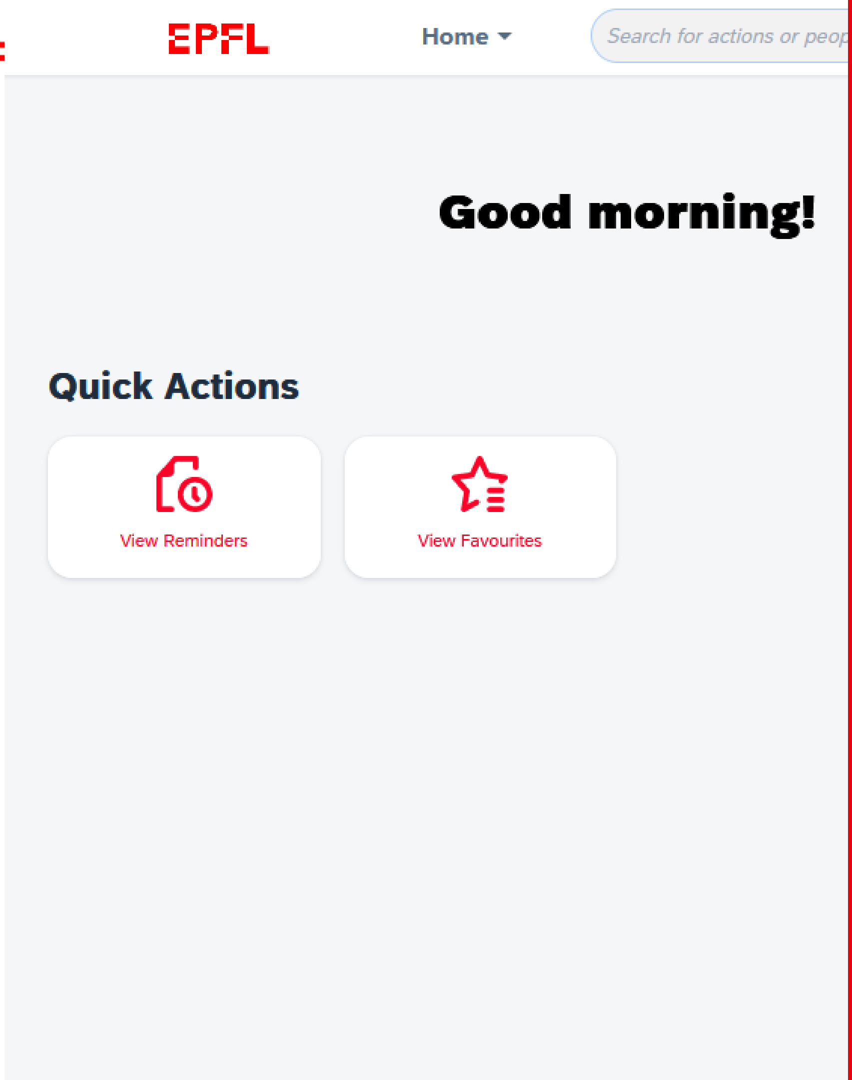
Look to the **future** by setting objectives and mapping out a career development plan.

Assessments over 12 months



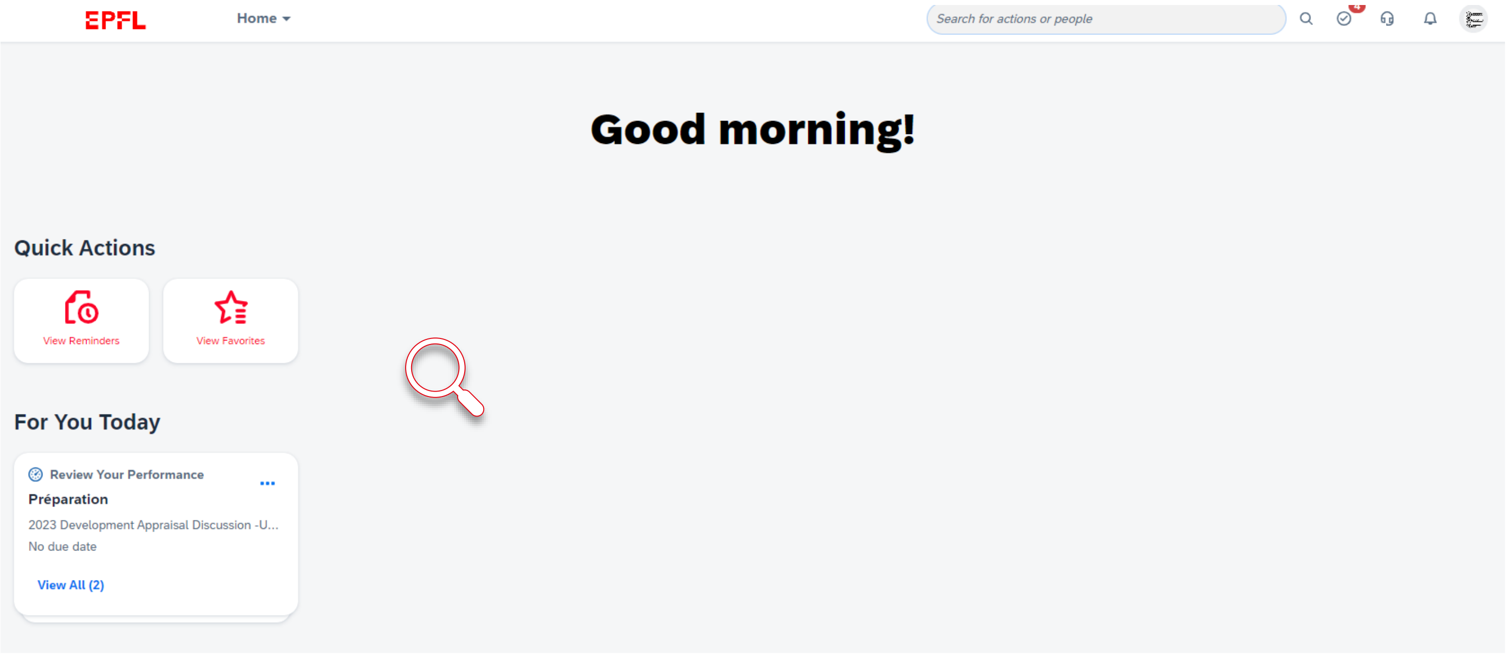
Legend

- Steps that must be entered into EPFL's HR system and confirmed using the performance review application
- Steps involving discussion between managers and employees



2. Performance review dashboard

Home page



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.

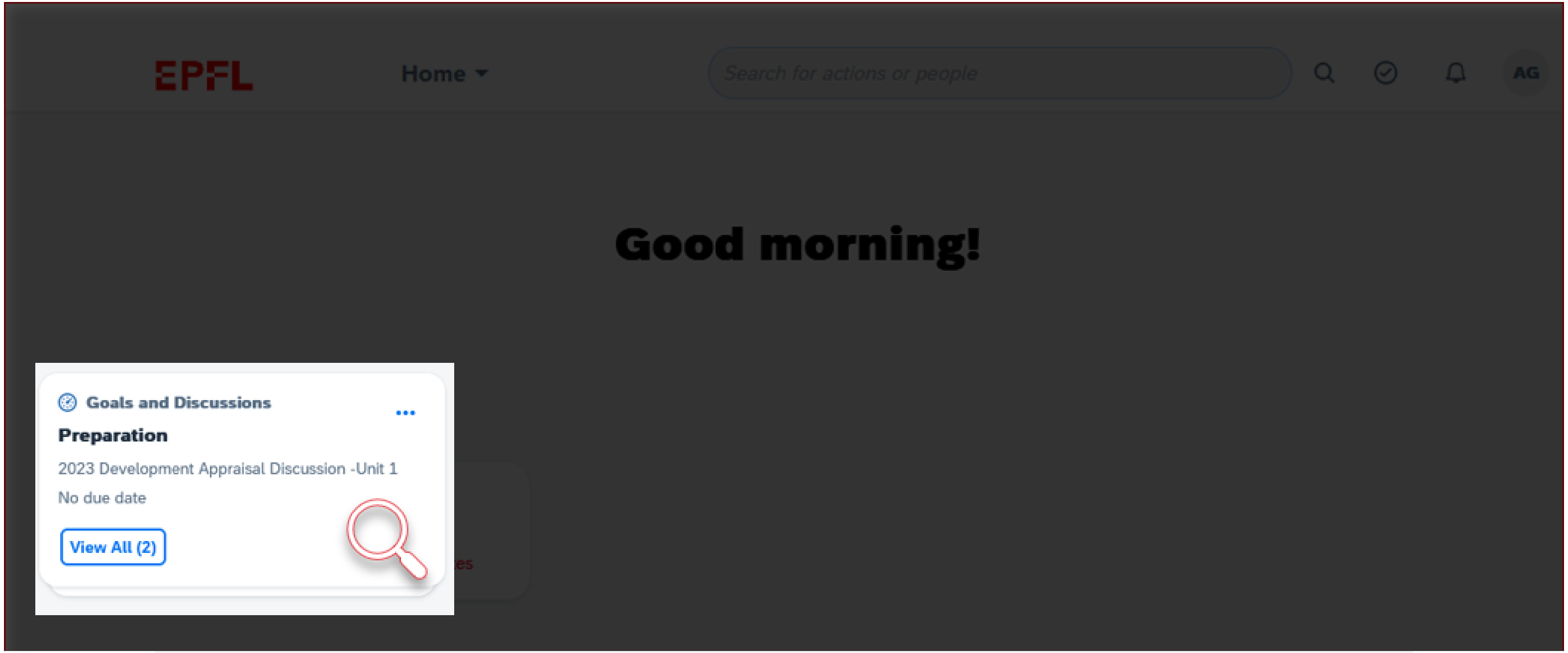
Quick Actions

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

Quick Actions

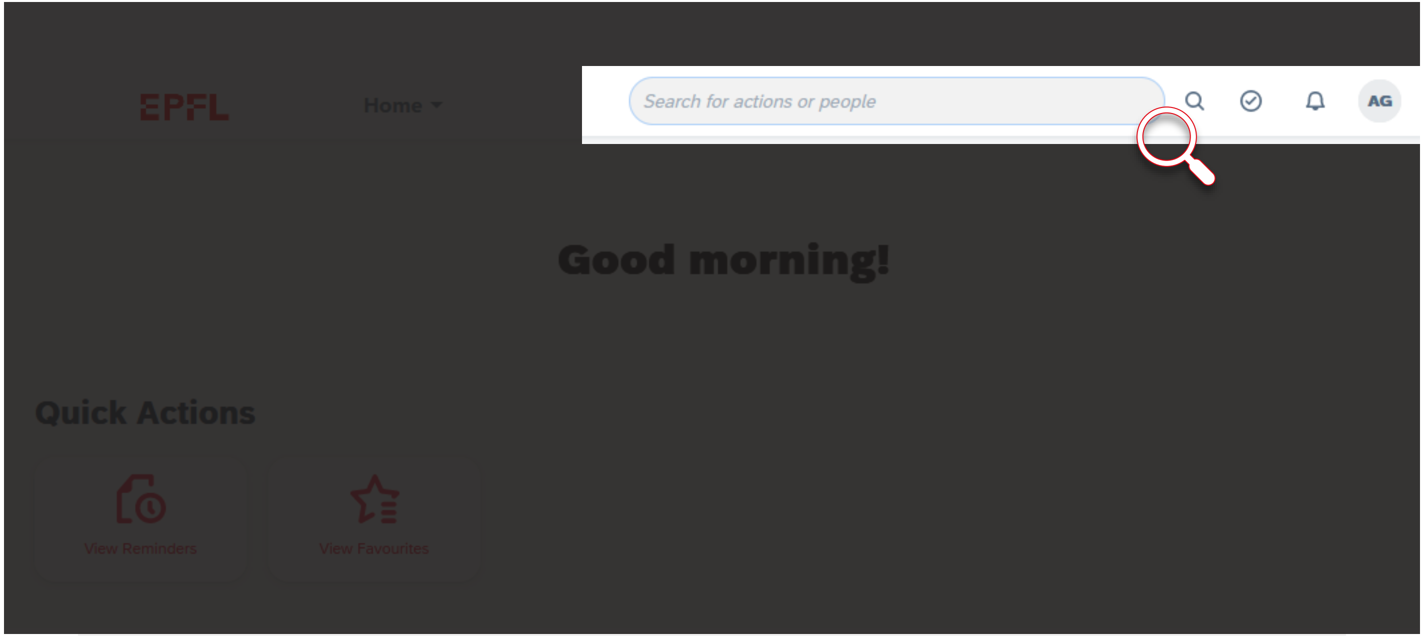
- **View reminders**
  Click on this button to view the reminders you've set (they'll appear the day after you set them).
- **View favourites**
  This button lets you directly open the pages you've identified as favourites.

Today’s reminders



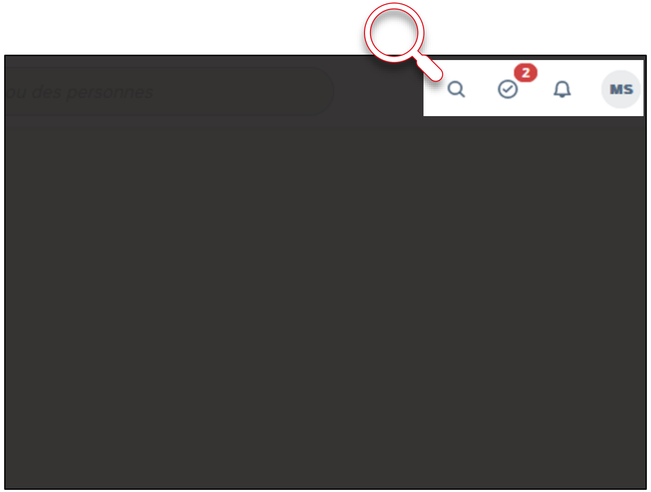
The reminder window is located in the lower left corner of the dashboard. It shows any ongoing tasks that need to be completed.

Toolbar



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

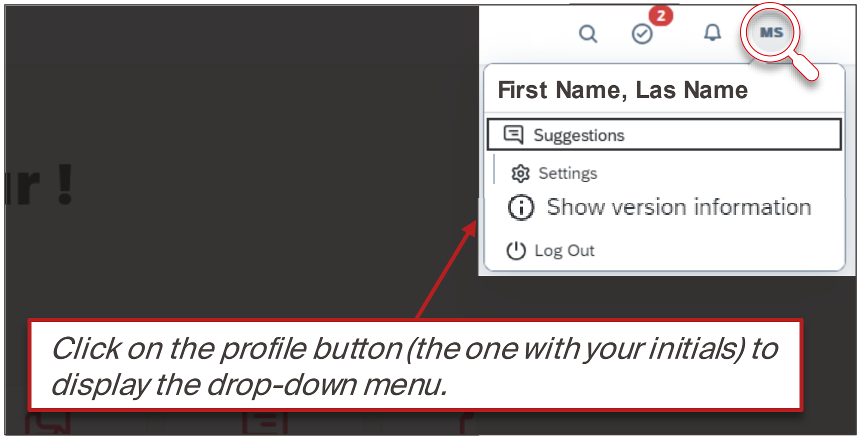
Toolbar



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

Profile menu



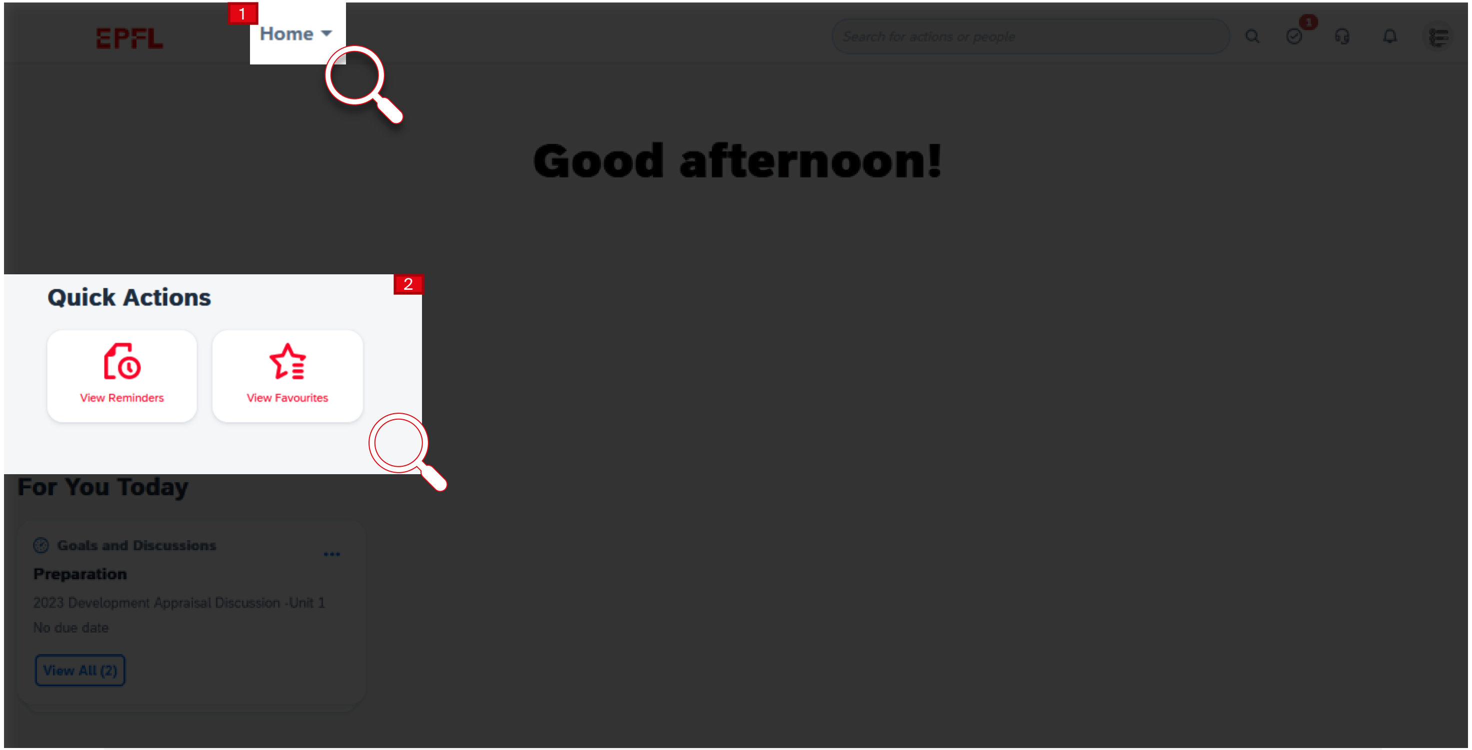
- **Suggestions**
  Lets you suggest improvements to the system developer
- **Settings**
  Lets you personalize the application (alerts, language, etc.)
- **Version information**
  Displays information on the current SAP version
- **Logout**

Pages menu

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

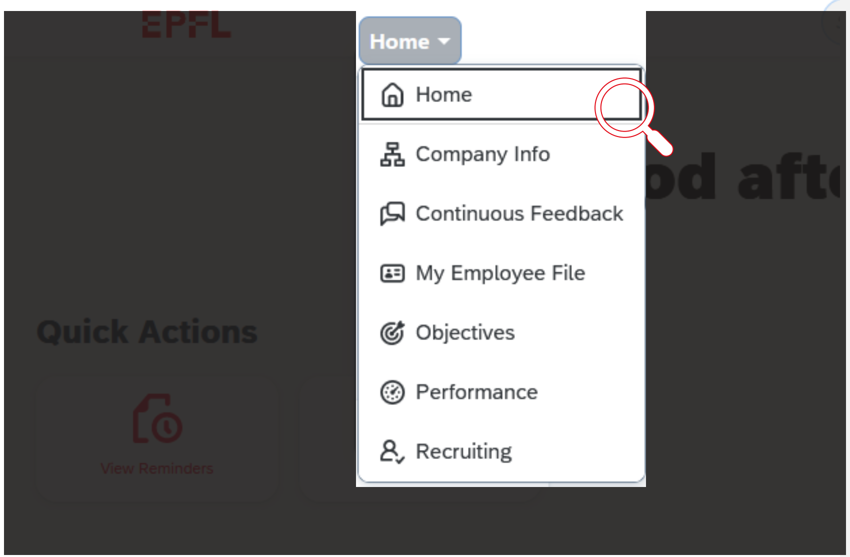
Two methods



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

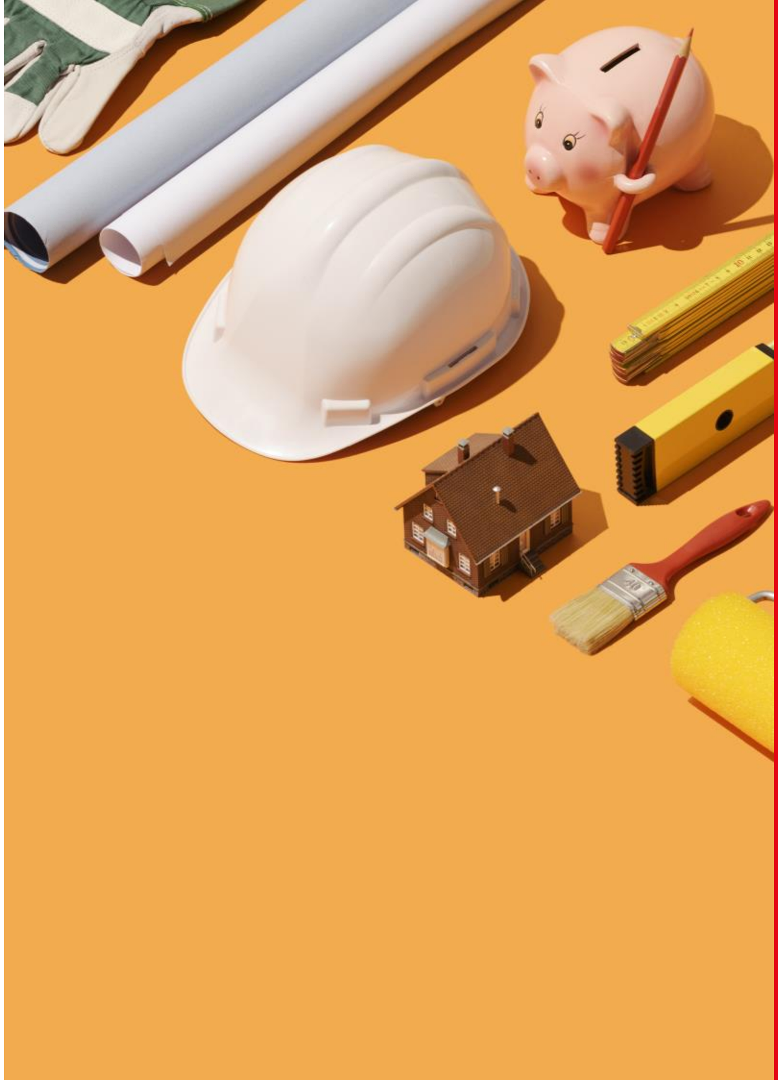
- the pages menu that appears when you click on “Home”
- the Quick Action buttons in the middle of the dashboard

Pages menu



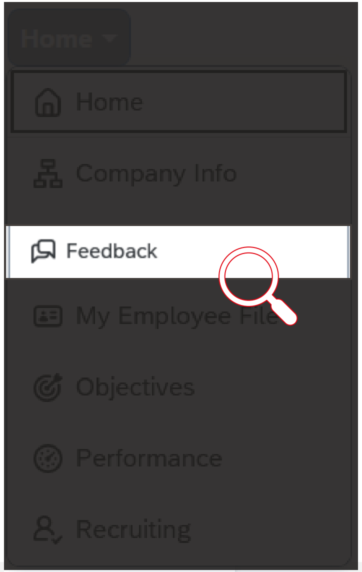
The drop-down menu appears when you click on "Home."

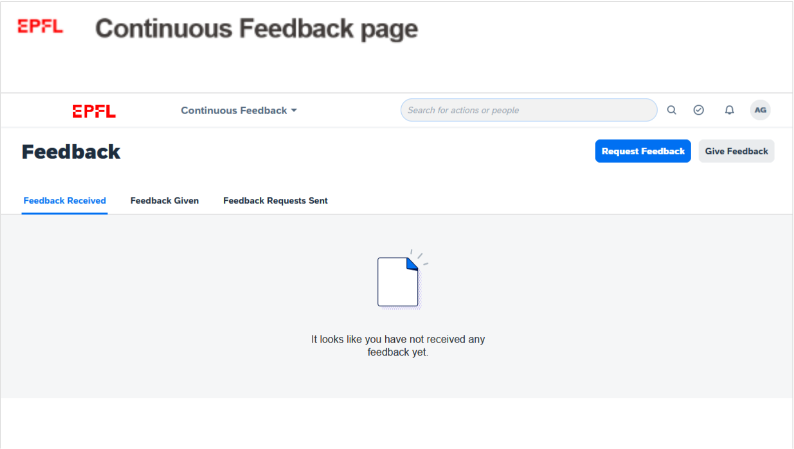
- **Home**
  The main page (dashboard) with buttons to access the various features.
- **Company Info**
  Shows your unit's organizational chart and a directory of EPFL employees. *This feature will be added in a subsequent update.*
- **Continuous Feedback**
  Opens a page summarizing the feedback you've 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

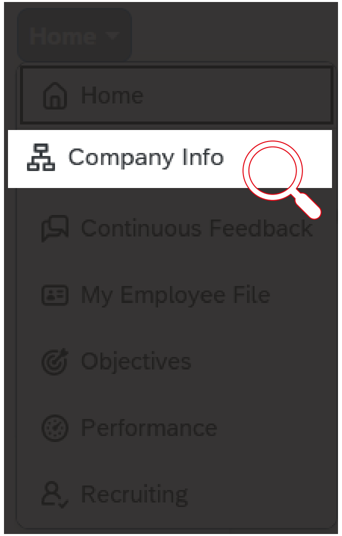


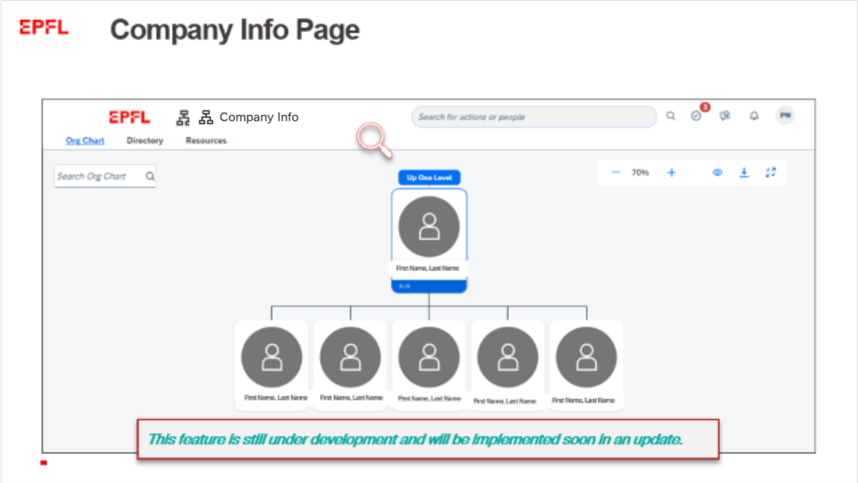


This page gives an overview of the feedback you've given, received and requested. It also contains two buttons in the upper right corner letting you "Request Feedback" and "Give Feedback" directly.

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.

Company Info Page

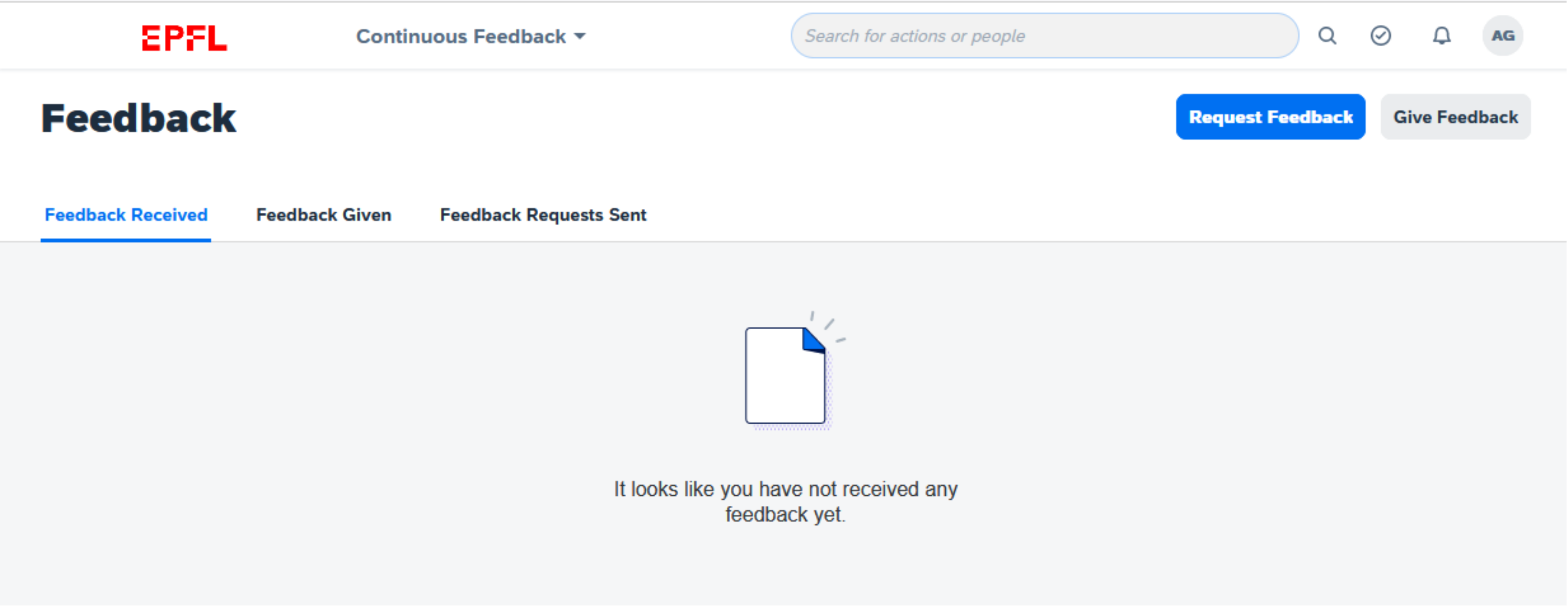




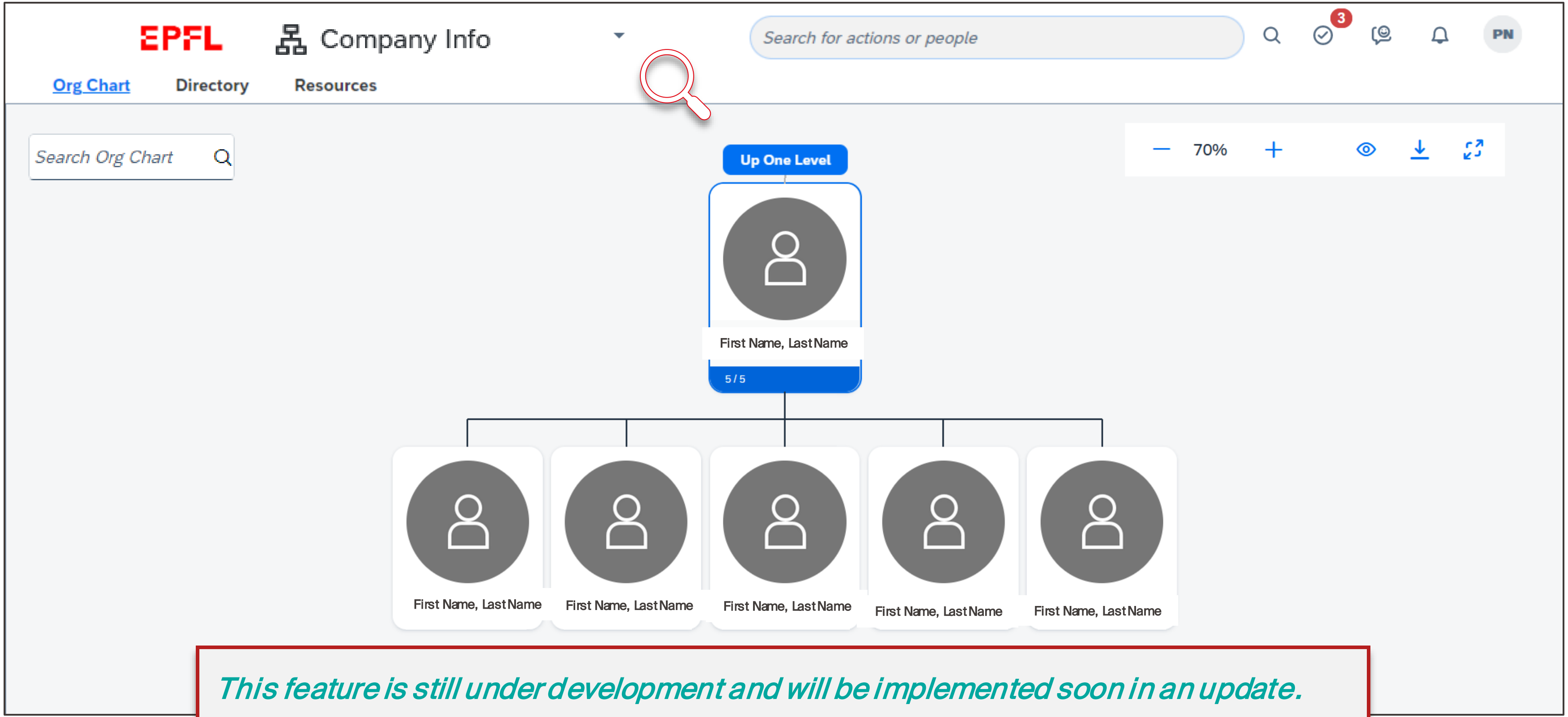
This page shows your unit's organizational chart. If you work for more than one unit, it shows the one for which you have the highest employment rate. You can use this page to see where you fit in the broader picture. The page also contains a directory with a search bar letting you search for any other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

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

Continuous Feedback page

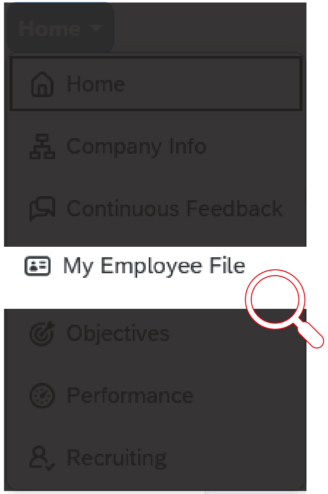


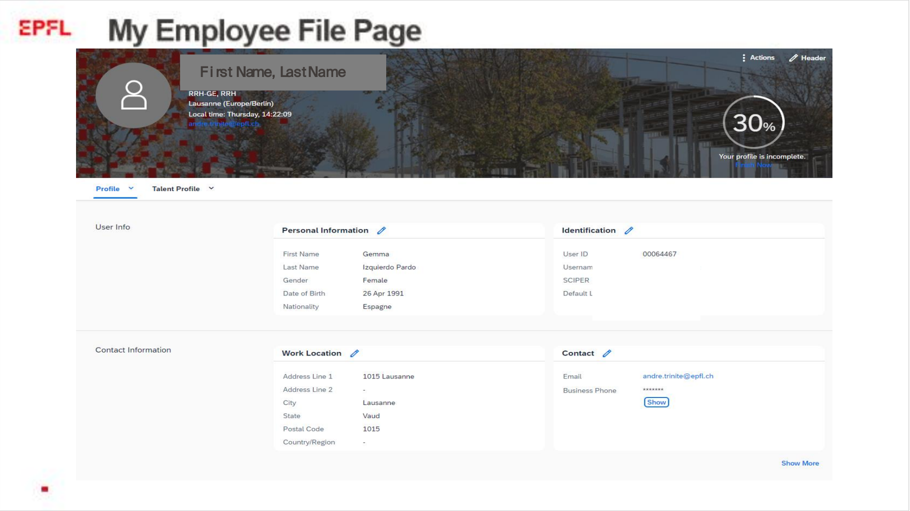
Company Info Page



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

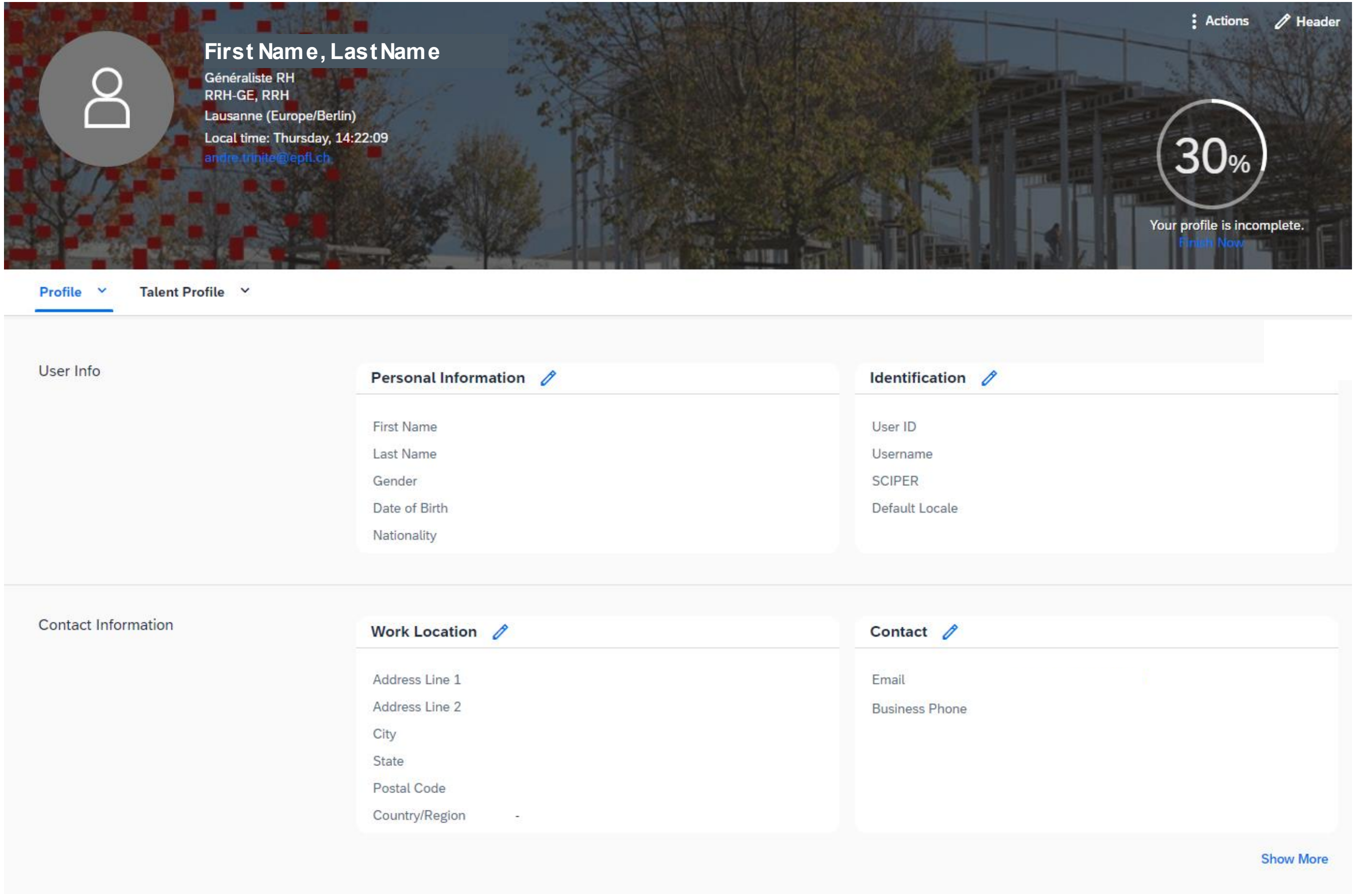
My Employee File Page



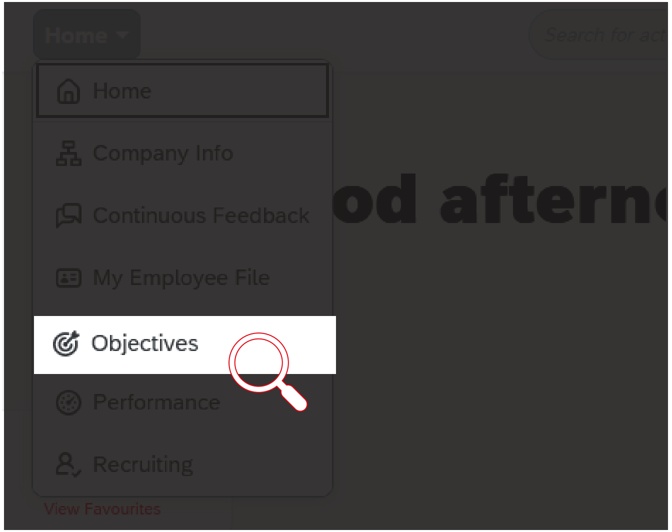


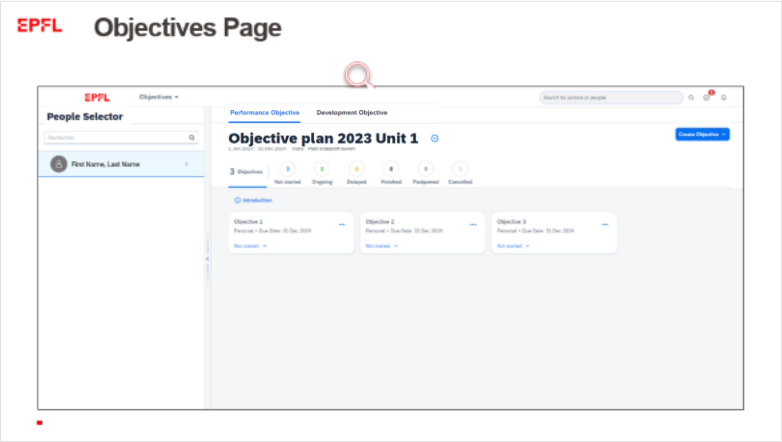
This page lists all the information in your profile broken down by category, including past performance review forms and employee mobility requests. Managers can use this page to view the employee mobility requests made by their employees.

My Employee File Page



Objectives Page

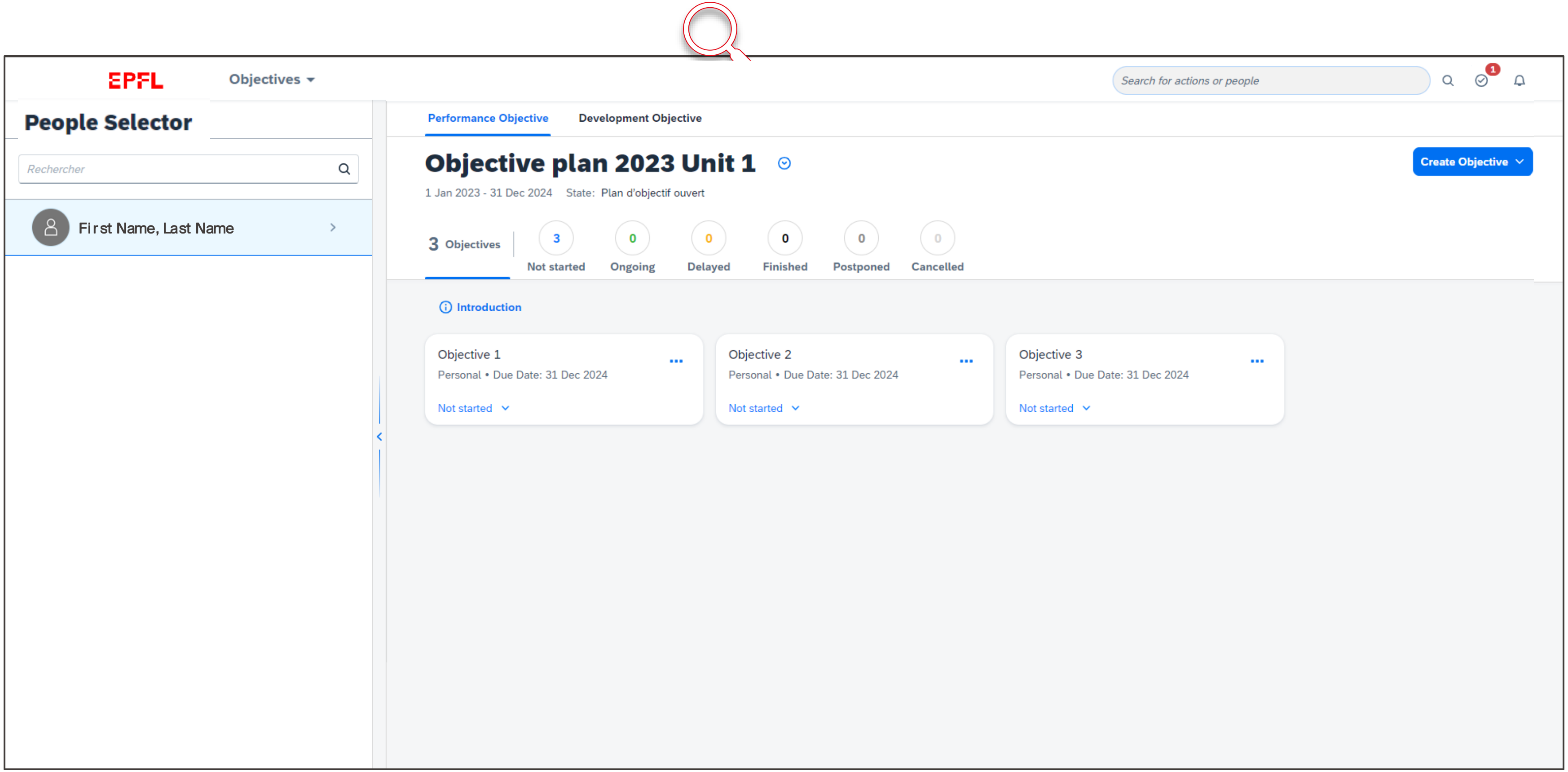




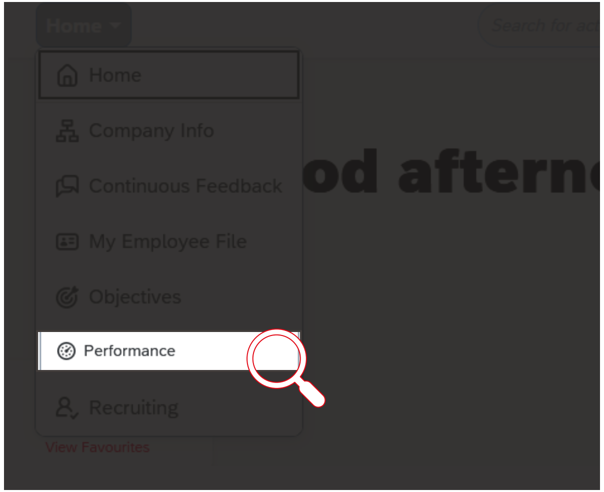
This page lists your performance and career-development objectives for the year, and lets you enter new objectives. You can also use this page to track progress on your objectives.

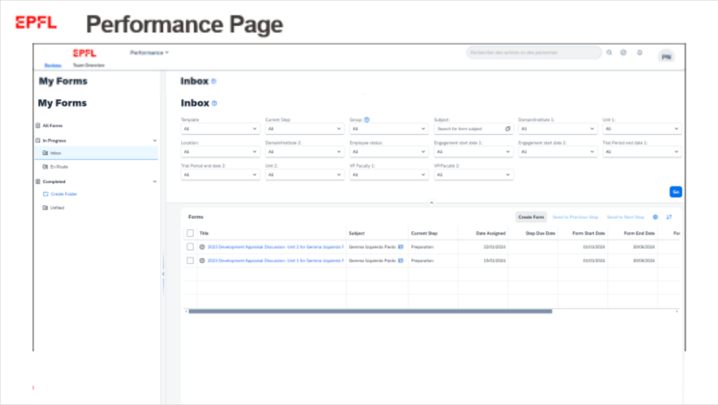
In Tutorial 4 , you'll learn more about using this page to help set your full-year objectives.

Objectives Page



Performance Page

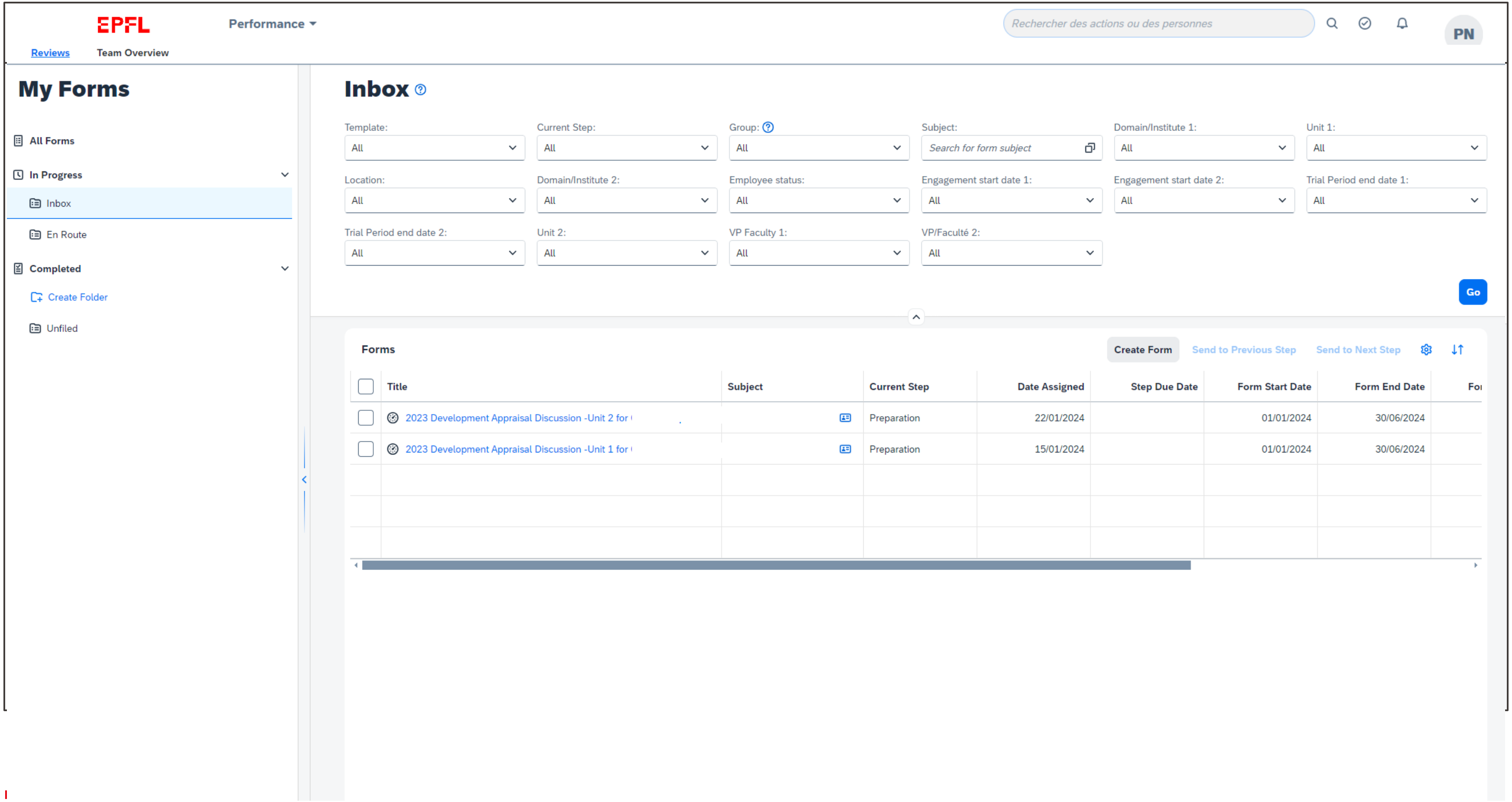




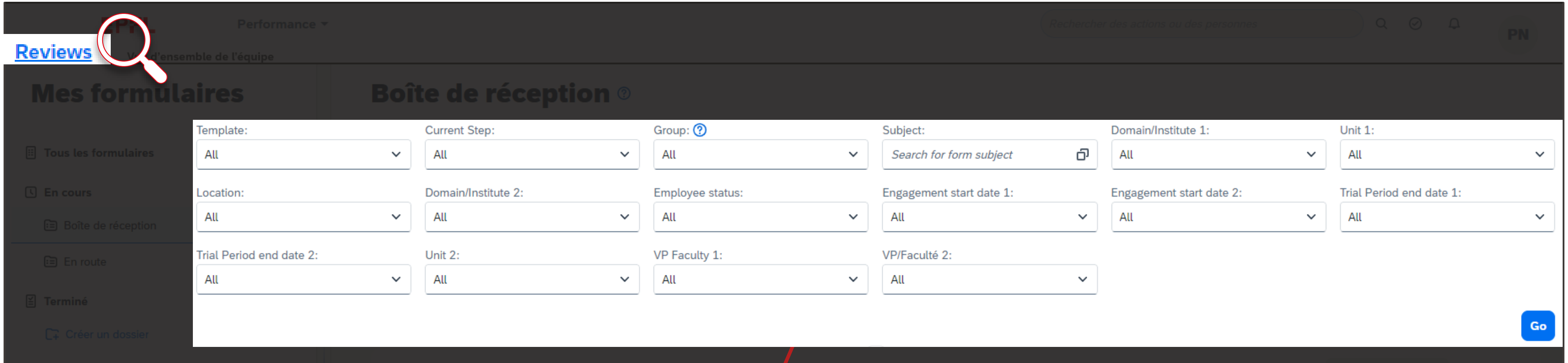
On this page, you'll find a compilation of all your current and past performance review forms (under the Reviews tab), including the forms for setting objectives. Managers can view the forms for each of their employees (under the Team Overview tab). The page opens directly on your Inbox where all your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

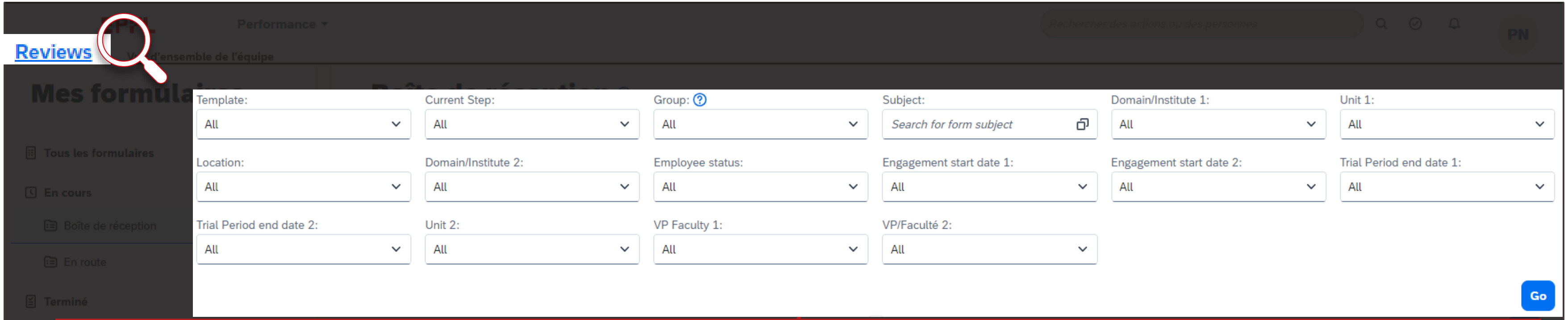


Performance Page



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 Page



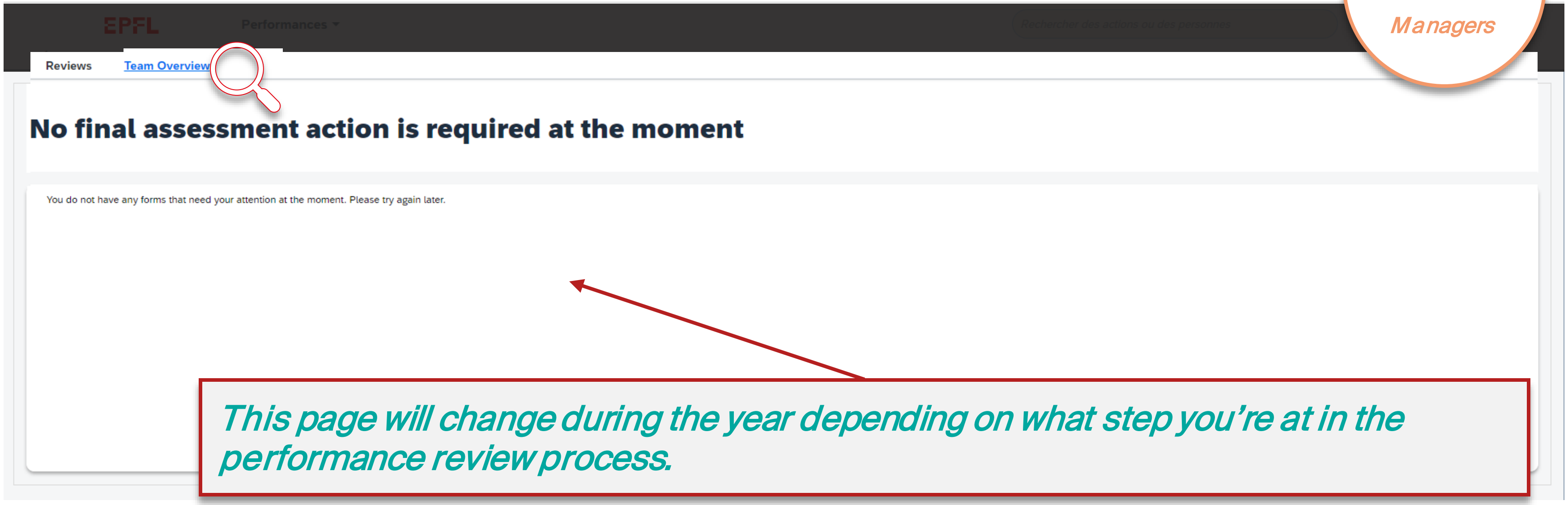
The other filters can be seen by all employees but they're useful only to managers. The domains and institutes, for example, that appear in the list will depend on your specific role.

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.

Performance Page – Manager View

Managers

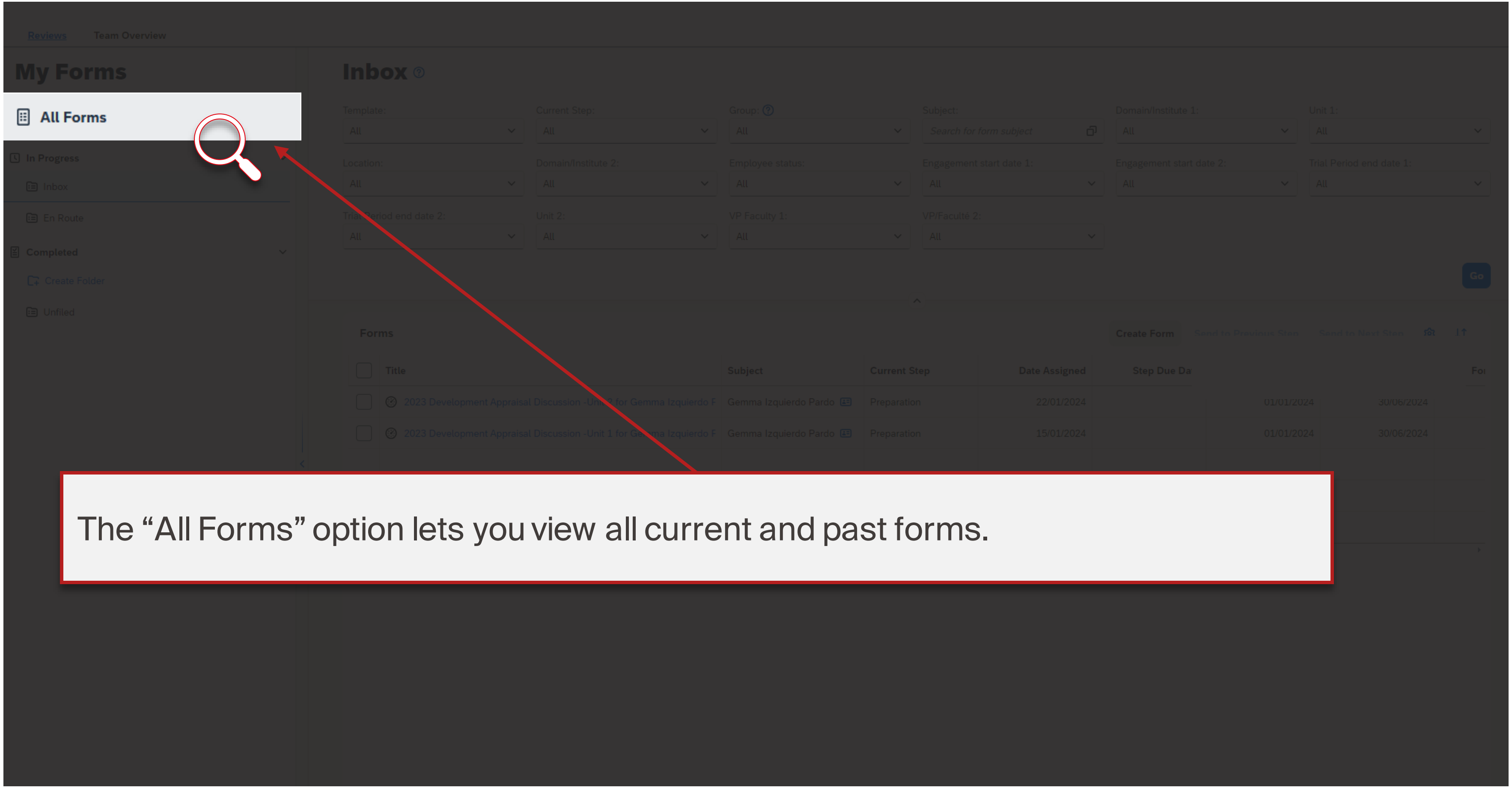


This page will change during the year depending on what step you're at in the performance review process.

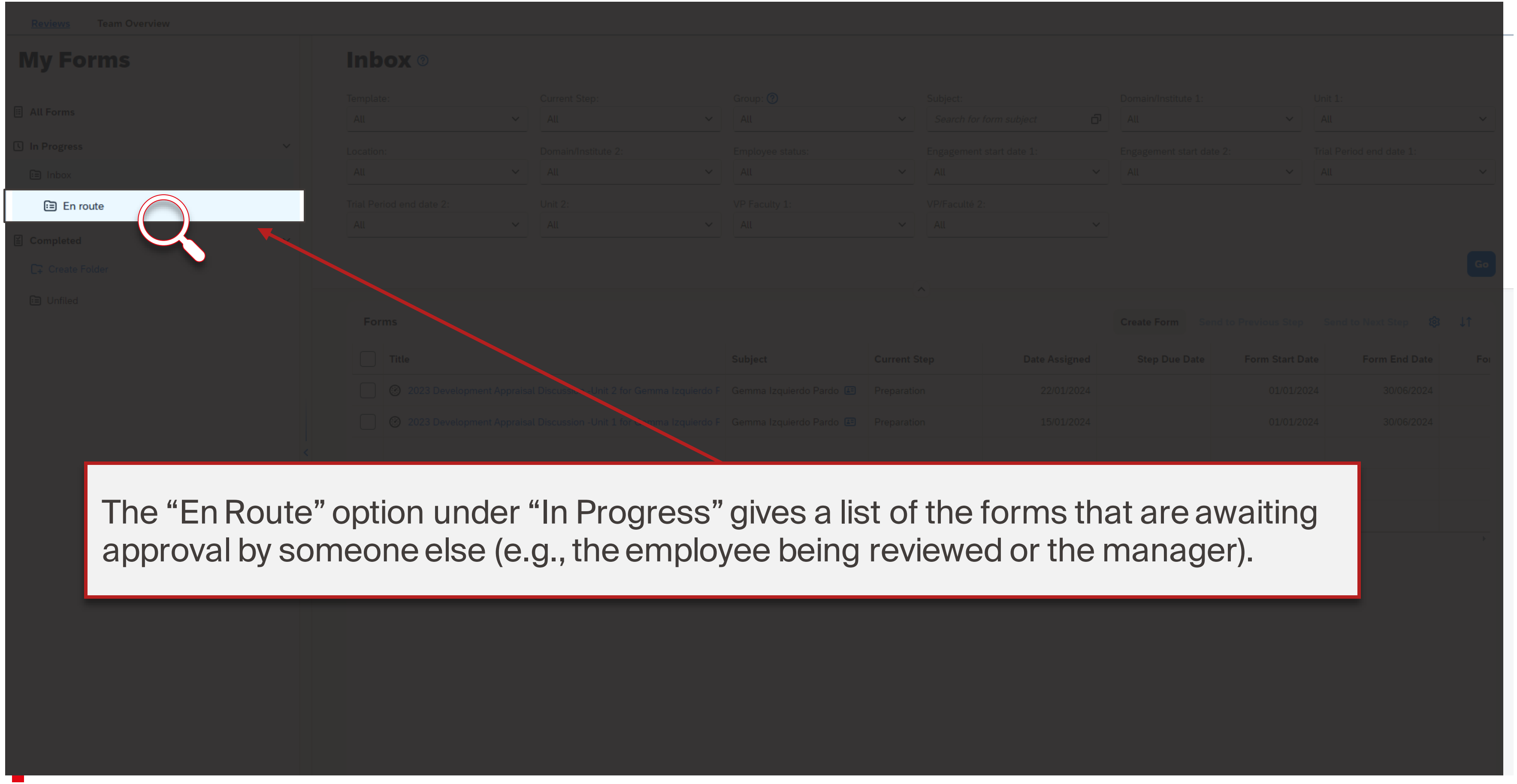
Managers

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

Performance Page

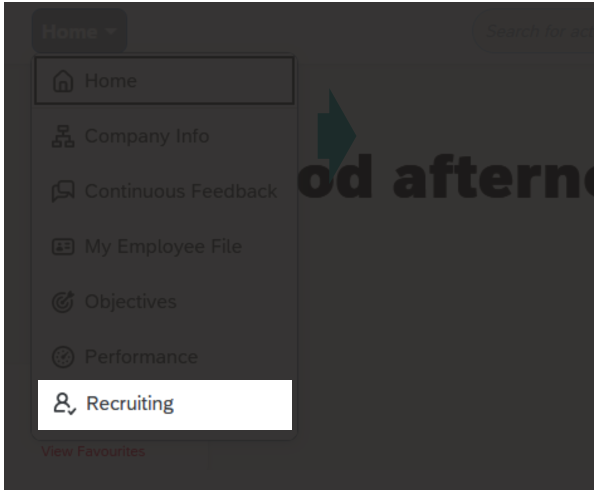


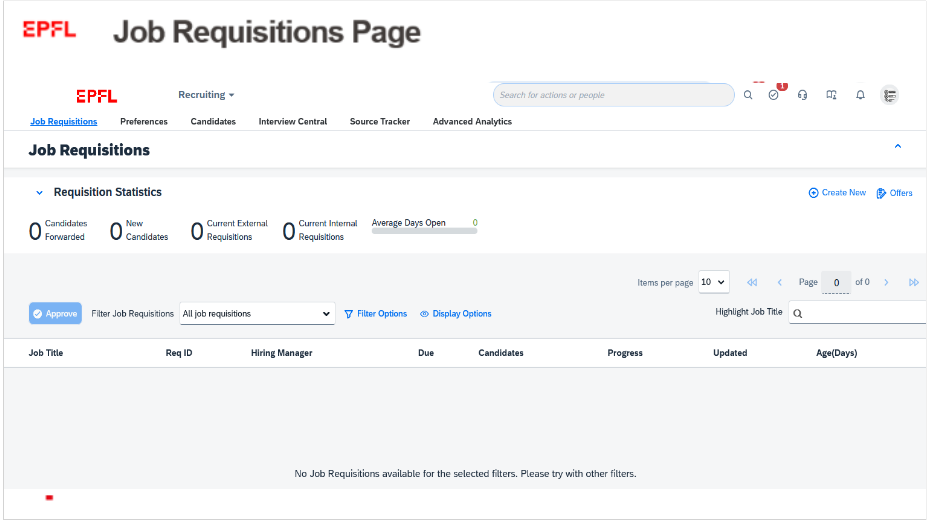
Performance Page



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).

Job Requisitions Page

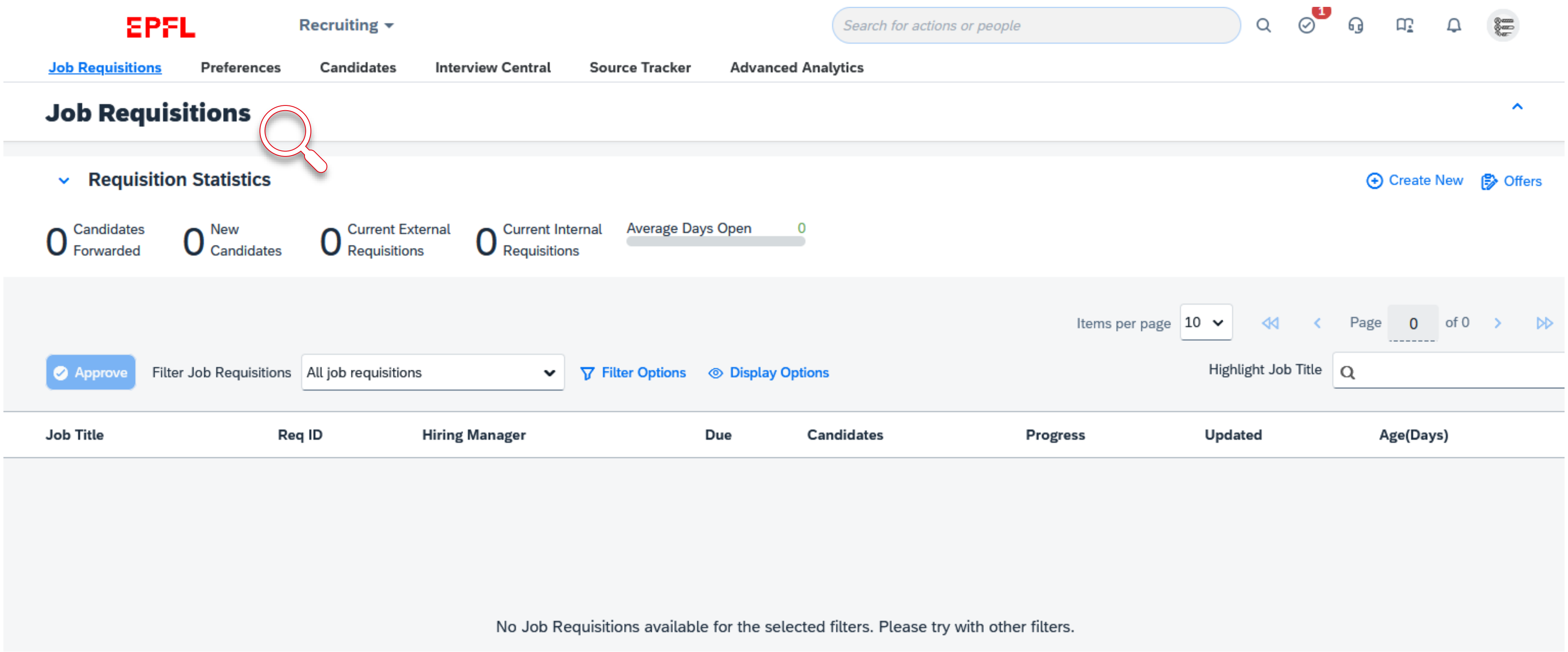




This page displays the hiring requests you've made.

Under development; will be available later this year.

Job Requisitions Page



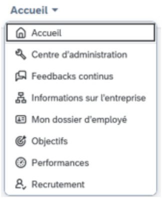
Most useful pages

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 *Now available*
Tutorial 2	Using the performance review application *Now available*
Tutorial 3	Completing the performance review form *Now available*
Tutorial 4	Completing the objectives form *Available from 2 February 2024*
Tutorial 5	Giving and receiving feedback *Available from 16 February 2024*

Your turn!

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