



Tutorial 4
Completing
the objectives
form

January 2024

1. Background
2. Setting objectives
3. Mapping out a career development plan

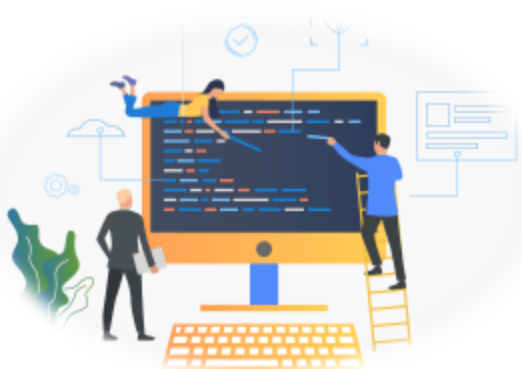


1. Background

This tutorial will guide you through the process of completing the online objectives form. It's one of a series of tutorials designed to help you use EPFL's new performance review application.

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:



- ✓ Make your way through the process of setting objectives and mapping out a career development plan
- ✓ Fill out the objectives form for the coming year, whether as a manager or an employee
- ✓ Use the application 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.

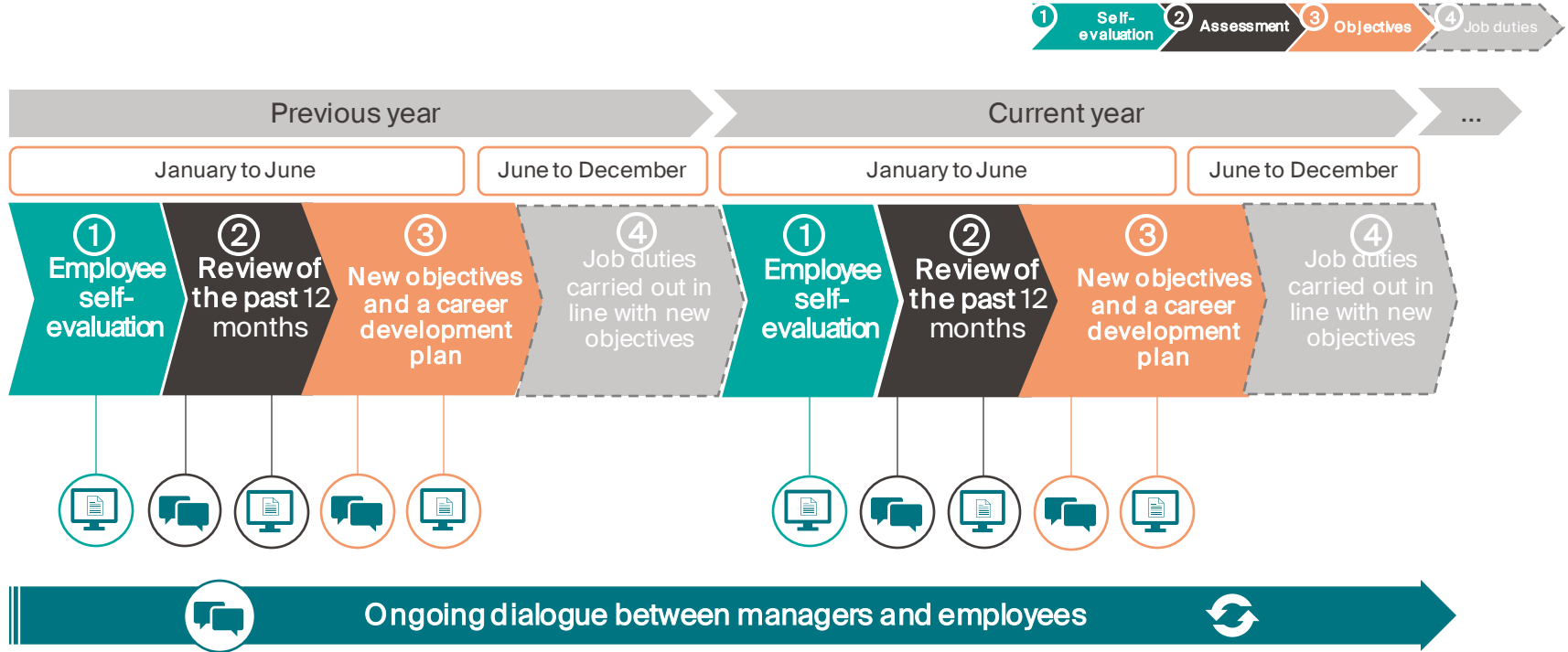


Discuss **past events** and learn from employees' experiences and achievements.

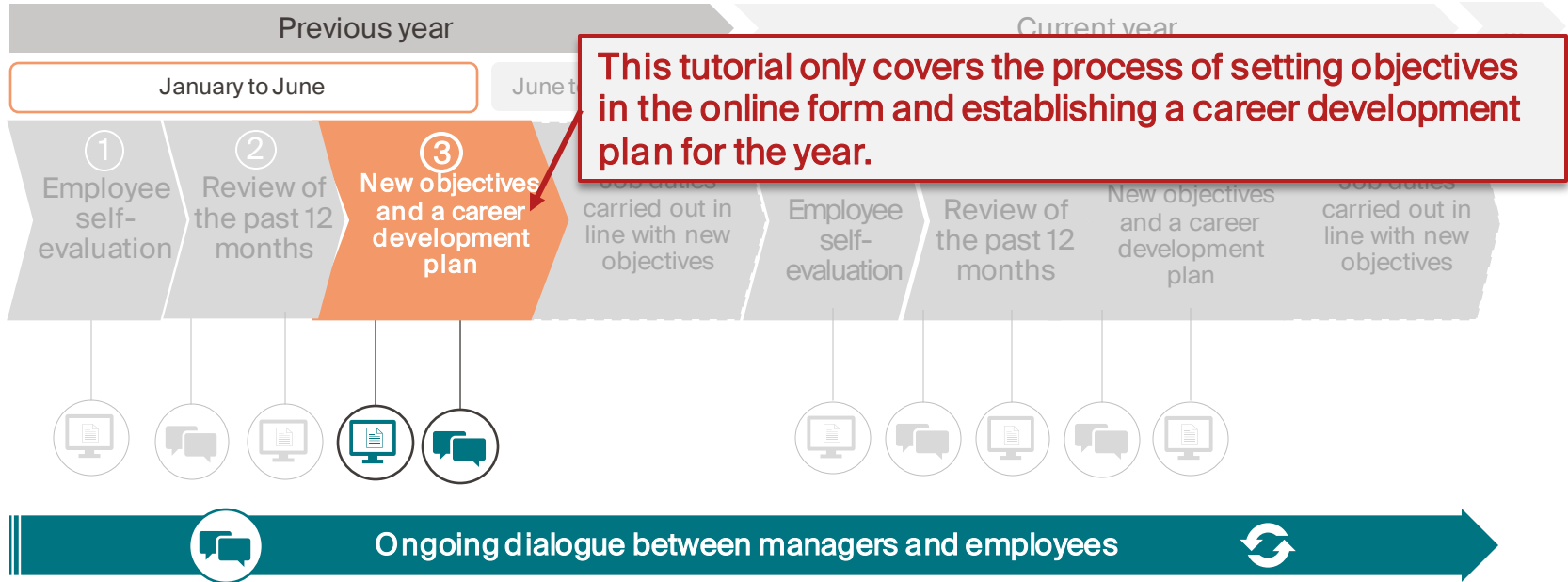


Look to the **future** by setting objectives and mapping out a career development plan.

Assessments over 12 months




Assessments over 12 months



This tutorial only covers the process of setting objectives in the online form and establishing a career development plan for the year.

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

[Back to: Inbox](#)

Setting objectives for 2024 - Unit 1



First Name, Last Name

✓ 0

Incomplete Items

[Route Map](#)[Introduction](#)[Employee Information](#)[Setting objectives for next year](#)

Route Map

Assessment

1

Objectives definition



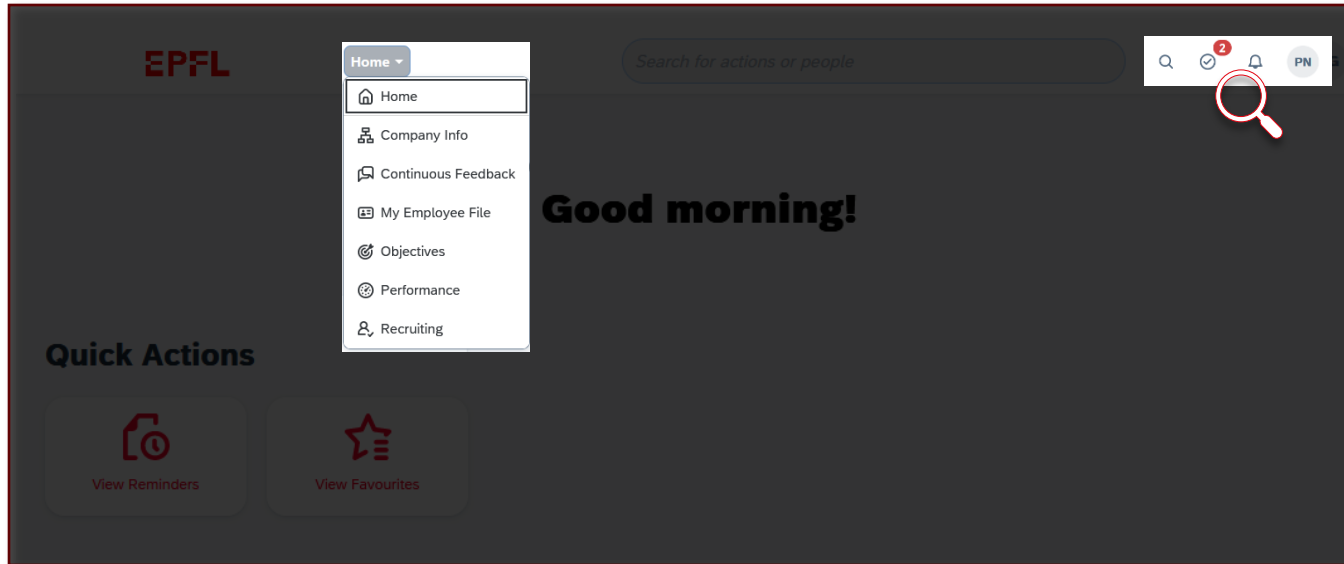
2

Employee's signature



Introduction

Opening the objectives window

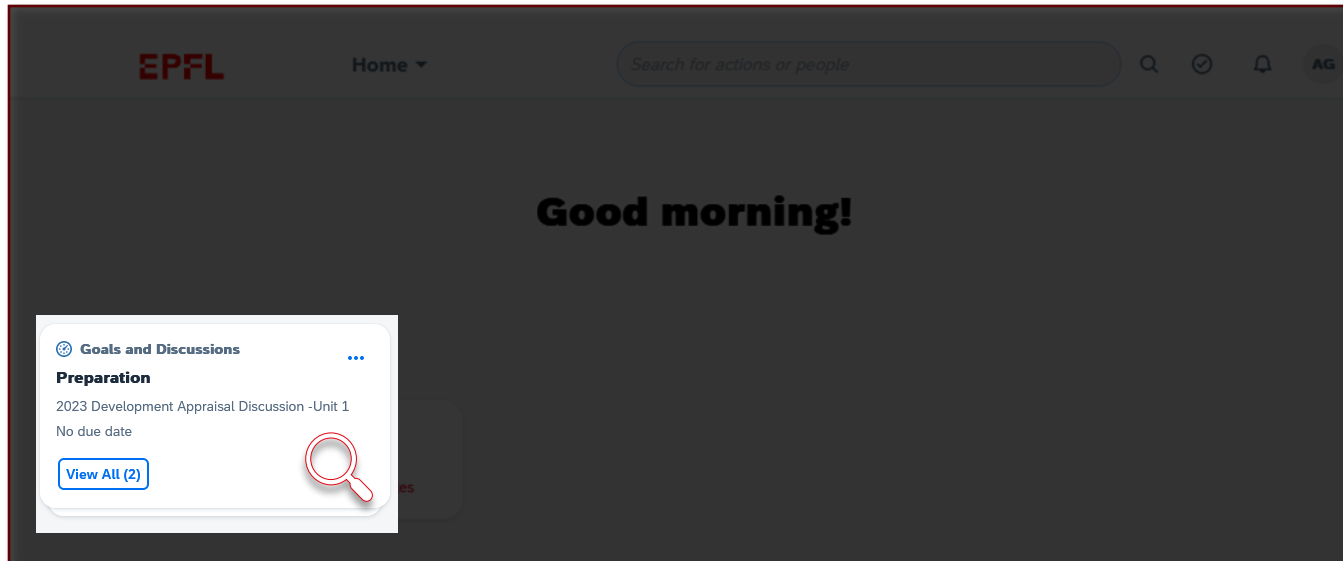


From the dashboard, you can open the objectives window in three ways:

- from the reminders box
- from the performance page
- from the toolbar

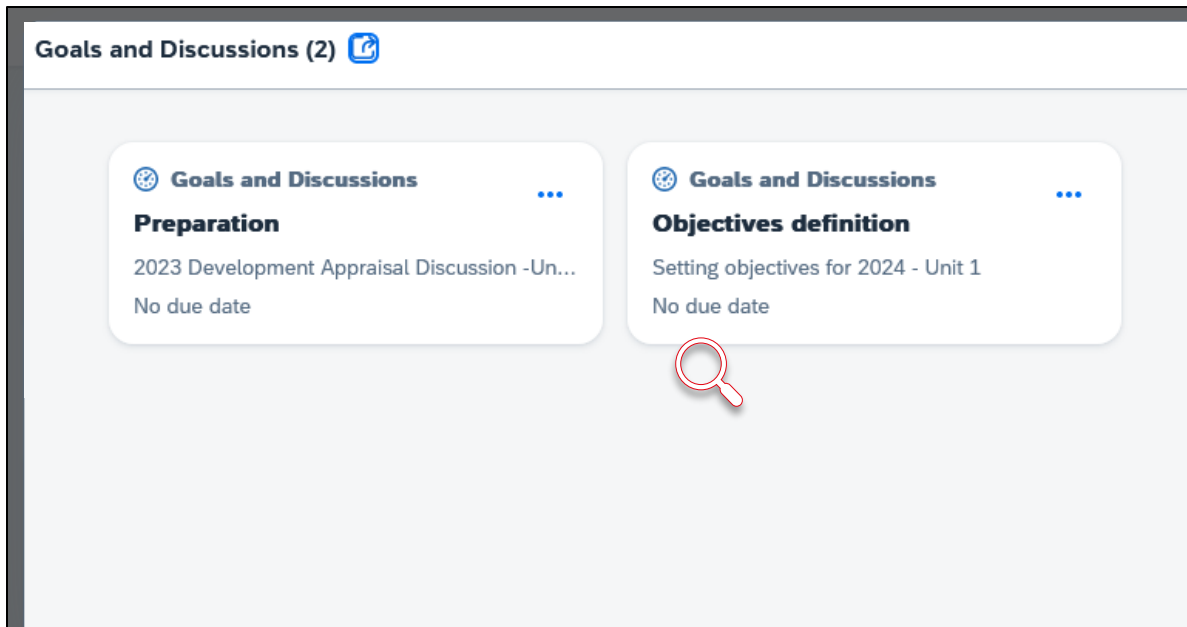
These methods are explained on the following slides.

1. From the reminders box



The first way to open the objectives window is through the reminders box in the lower left corner of the dashboard. You'll need to click on "View All."

1. From the reminders box



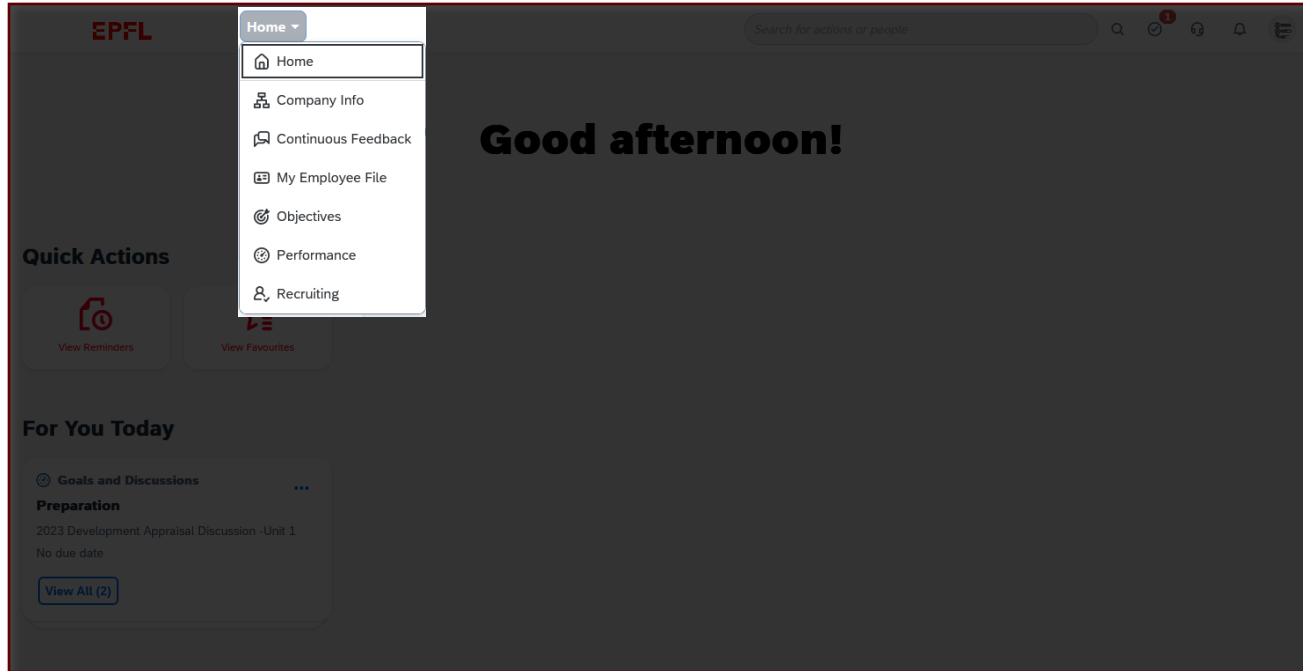
In the Goals and Discussions window, click on “Objectives definition.”



You won't see a name on your objectives form because yours is the only ones you can open. If you're assigned to several EPFL units, you can fill out an online form for up to two units. For the third one, you'll need to fill out the Word document available on [the HR website](#).

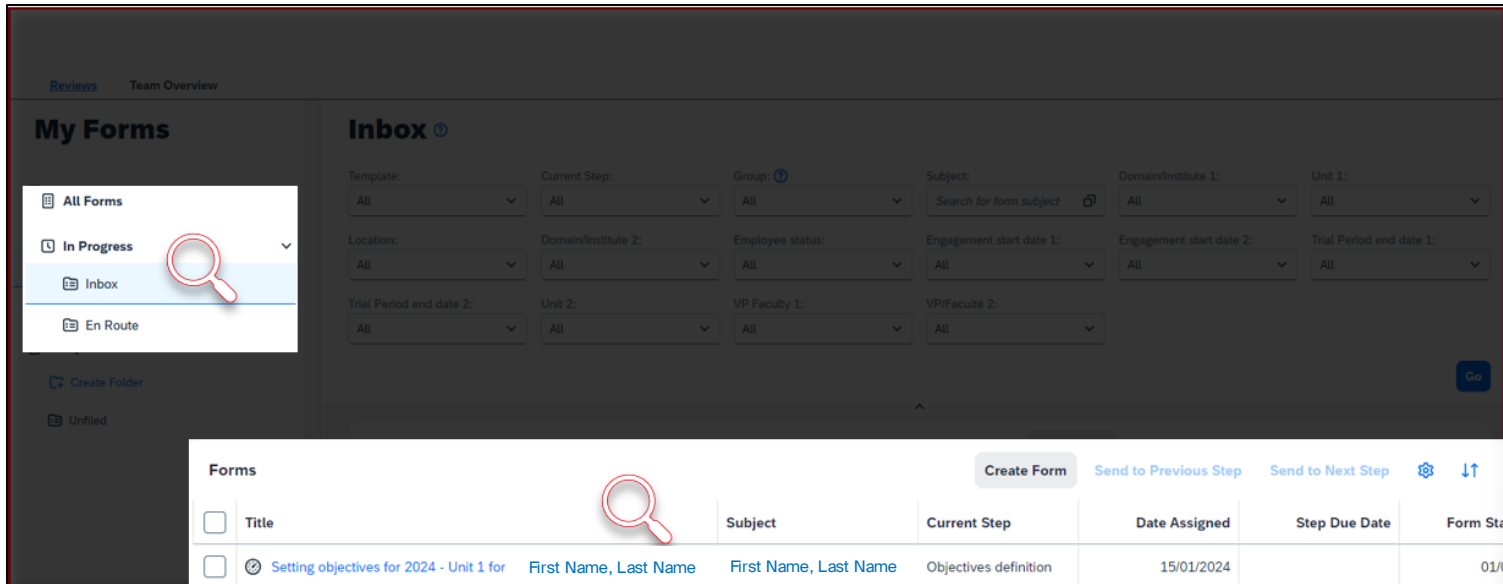


You will see several boxes, one for each employee in your unit. You'll need to complete one objectives form for each employee you review.



The second way to open the objectives window is by selecting “Performance” in the pages menu that appears when you click on “Home” at the top of the dashboard.

2. From the performance page



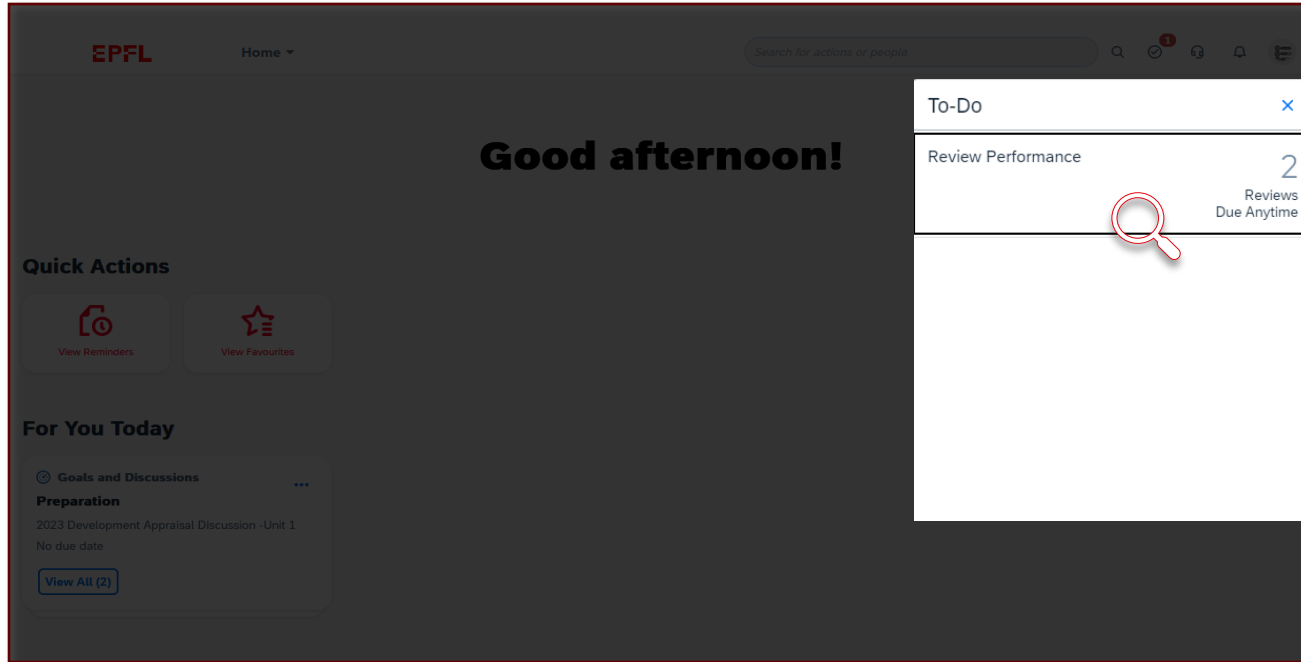
The screenshot displays the performance page interface. On the left, the 'My Forms' sidebar is visible, with the 'Inbox' option selected and highlighted by a red magnifying glass. The main area shows the 'Inbox' table, which is also highlighted by a red magnifying glass. The table contains a list of forms to be filled out, with the first row being the selected form.

Forms	Title	Subject	Current Step	Date Assigned	Step Due Date	Form Sta
<input type="checkbox"/>	Setting objectives for 2024 - Unit 1 for	First Name, Last Name	First Name, Last Name	Objectives definition	15/01/2024	01/0

When the performance page opens, the “Inbox” option will be selected in the menu on the left. A list of forms to fill out will appear in the center of your screen. Select the objectives form for either yourself or the employee you plan to review.



The third way to open the objectives window is through the toolbar in the upper right corner of the dashboard. Click on the tasks icon, which is the second from the left.



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. The main content area features a large 'Good afternoon!' greeting. Below this are sections for 'Quick Actions' (View Reminders, View Favourites) and 'For You Today' (Goals and Discussions, Preparation). A 'To-Do' list overlay is visible on the right side, containing a task 'Review Performance' with a magnifying glass icon over it. The task details show '2 Reviews Due Anytime'.

A To-Do list will appear. Click on “Review Performance.” This task will appear until the objectives forms have been filled out completely.

The screenshot shows the EPFL HR system interface. At the top, there's a search bar and navigation icons. A 'To-Do' notification for 'Review Performance' is visible, indicating 2 reviews are due anytime. Below this, there's a 'Review Performance' window with a table. The table has three columns: 'Objectives definition', 'First Name, Last Name', and 'Due Date'. A magnifying glass icon is overlaid on the table, highlighting the 'Objectives definition' column. The interface also shows 'Quick Actions' for 'View Reminders' and 'View Favourites', and 'For You Today' section with 'Goals and Discussions' and 'Preparation' tasks.

The “Review Performance” window will appear, where you should select “Objectives definition.”



If you're assigned to two or more EPFL units:

You'll need to go through the process of filling out an objectives form for each unit. The forms can be completed online for up to two units; if you also work for a third unit, you'll need to fill out the Word document available on [the HR website](#).



You may see several “Objectives definition” lines, one for each employee you will review. You'll need to complete one objectives form for each employee.

The objectives window

The screenshot shows the 'Setting objectives for 2024 - Unit 1 for' interface. At the top, there is a navigation bar with 'EPFL' and 'Performance' dropdown. On the right, there are notification icons (a checkmark with '2', a bell, and a 'GIP' icon). Below the navigation, there are tabs for 'Reviews' and 'Team Overview', and a 'Back to: Inbox' link. The main title is 'Setting objectives for 2024 - Unit 1 for' followed by the user's name 'First Name, Last Name'. To the right of the title are icons for 'Actions', 'History', and document management. Below the title, there is a user profile section with a placeholder for a profile picture, the name 'First Name, Last Name', a '0' in a box with a checkmark, and the text 'Incomplete Items'. To the right of this is another box with '0' and the text 'Supporting'. Below the profile section is a horizontal menu with items: 'Route Map', 'Introduction', 'Employee Information', 'Setting objectives for next year', 'Development objectives', and 'Expected behaviors'. The 'Route Map' section is expanded, showing a progress bar with four steps: 1. Objectives definition (active), 2. Employee's signature, 3. Manager Unit 1 Signature, and 4. Completed. The 'Introduction' section is also visible below the route map.

EPFL Performance

Reviews Team Overview

Back to: Inbox

Setting objectives for 2024 - Unit 1 for First Name, Last Name

Actions History

First Name, Last Name 0 Incomplete Items 0 Supporting

Route Map Introduction Employee Information Setting objectives for next year Development objectives Expected behaviors

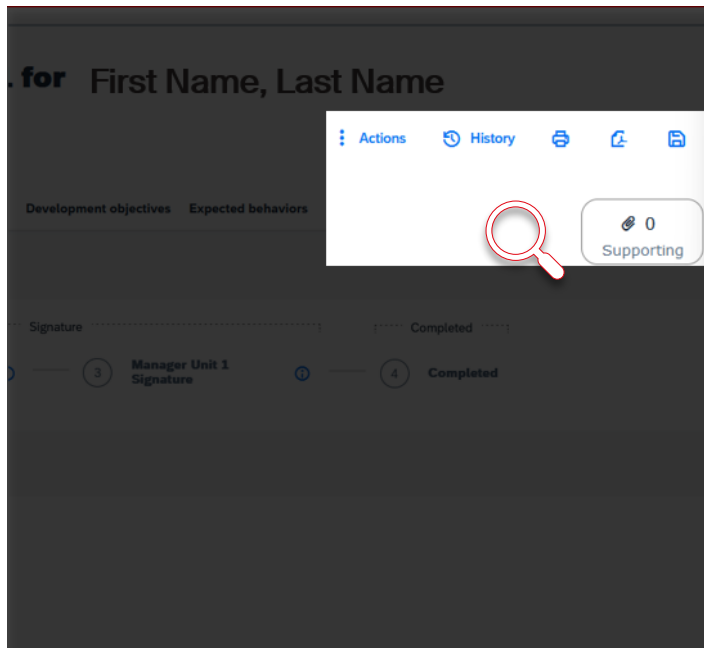
Route Map Hide

Assessment Signature Completed

1 Objectives definition 2 Employee's signature 3 Manager Unit 1 Signature 4 Completed

Introduction

This is the objectives window that will appear where you can set your objectives. It looks the same for managers and employees.



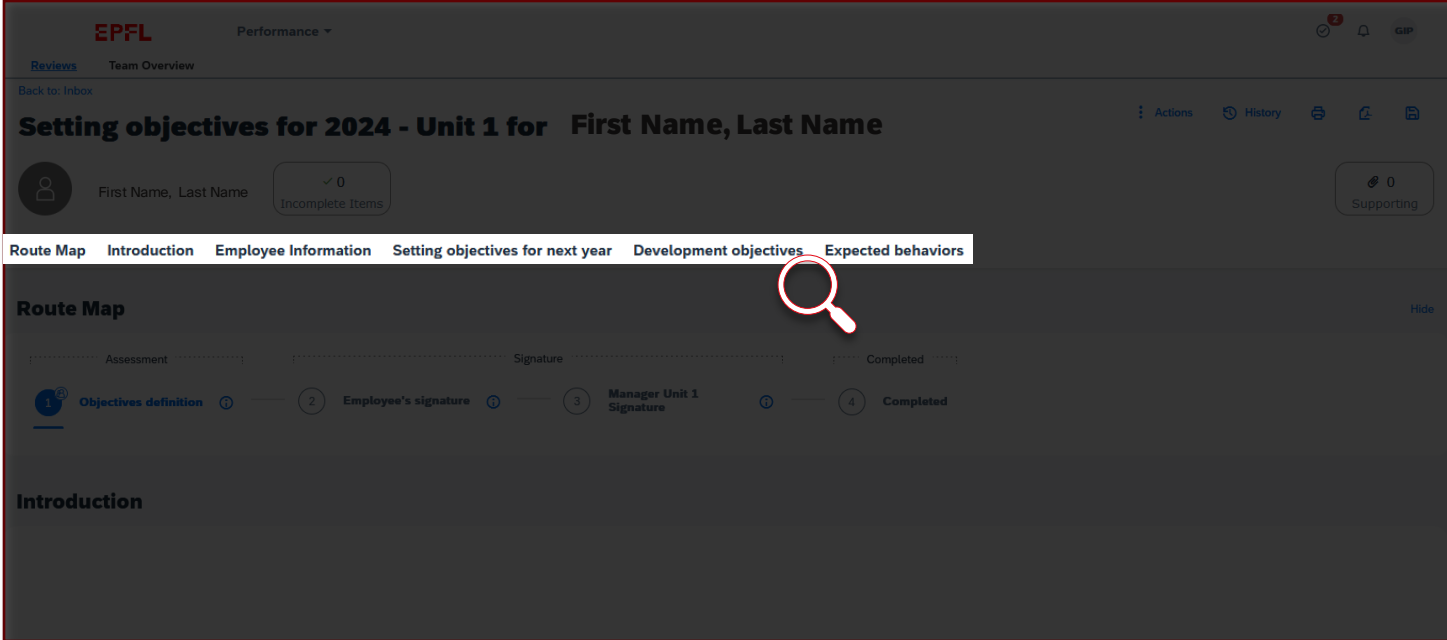
⋮ Actions

🕒 History



+ 0
Supporting

- **Actions**
Here you can run spellcheck and view general information about the form, including its properties and chain of approval.
- **History**
Use this feature to search your previous forms in a given time period.
- **Print**
This button lets you print the form and manage the print settings (the sections and other details).
- **Save as PDF**
You can save the form and its options as a PDF file.
- **Save online**
Click this button to save the information you've already entered if you need to come back and finish later.
- **Supporting**
Use this feature to add an attachment to your form.



The screenshot displays the EPFL Performance system interface. At the top, the EPFL logo and 'Performance' dropdown are visible. Below, the page title is 'Setting objectives for 2024 - Unit 1 for First Name, Last Name'. A navigation menu is highlighted in the center, listing sections: Route Map, Introduction, Employee Information, Setting objectives for next year, Development objectives, and Expected behaviors. A magnifying glass highlights the 'Development objectives' section. Below the menu, a 'Route Map' section shows a progress bar with four steps: 1. Objectives definition, 2. Employee's signature, 3. Manager Unit 1 Signature, and 4. Completed. The 'Introduction' section is also visible below the route map.

A menu with all the sections in the objectives form will appear in the center of your screen. You can click on the name of a section to jump to it immediately.

The screenshot displays the EPFL performance management system interface. At the top, the EPFL logo and 'Performance' menu are visible. The main header reads 'Setting objectives for 2024 - Unit 1 for First Name, Last Name'. Below this, there are buttons for 'Incomplete Items' and 'Supporting'. A navigation menu includes 'Route Map', 'Introduction', 'Employee Information', 'Setting objectives for next year', 'Development objectives', and 'Expected behaviors'. The 'Route Map' section is highlighted with a red magnifying glass and shows a progress bar with four steps: 1. Objectives definition (active), 2. Employee's signature, 3. Manager Unit 1 Signature, and 4. Completed. The progress bar is labeled 'Assessment' and 'Signature' and 'Completed'.

The Route Map is located just below the menu. It shows you how far along you are in the objectives-setting process.

The objectives window


EPFL Performance ▾

Reviews Team Overview

Back to: Inbox

Setting objectives for 2024 - Unit 1 for First Name, Last Name

Actions History Print Share Save

 First Name, Last Name ✓ 0 Incomplete Items ✎ 0 Supporting

Route Map Introduction Employee Information Setting objectives for next year Development objectives Expected behaviors

Route Map Hide

Assessment Signature Completed

1 Objectives definition ⓘ — **2** Employee's signature ⓘ — **3** Manager Unit 1 Signature ⓘ — **4** Completed

Introduction

Use this page to set your objectives jointly with your manager. Together, you can enter specific objectives. You should ideally schedule a meeting to discuss the objectives and make sure your expectations are aligned.

[Back to: Inbox](#)

Setting objectives for 2024 - Unit 2 for



First Name, Last Name

✓ 0

[Route Map](#)[Introduction](#)[Employee Information](#)[Setting objectives for next year](#)

Development objectives

Please enter maximum 5 development objectives

[Expand All](#)[Collapse All](#)

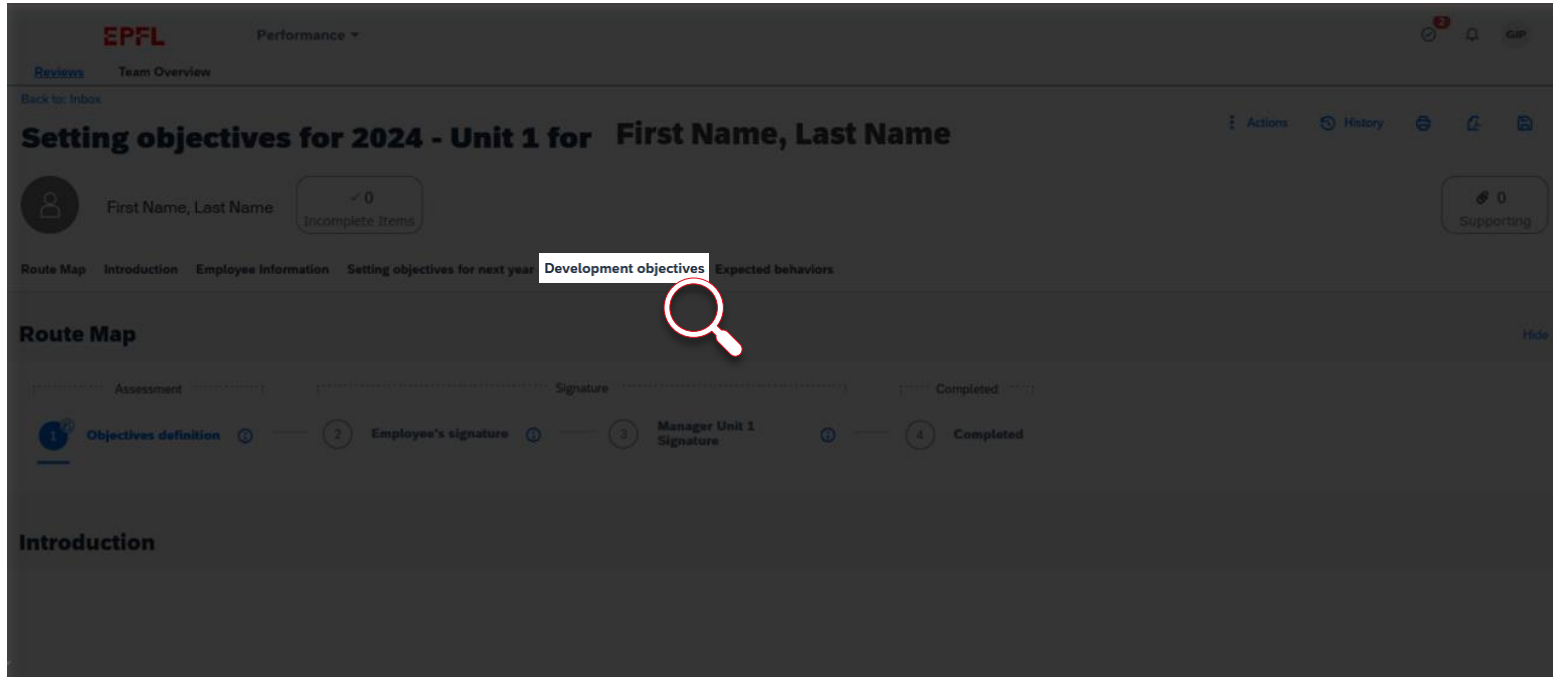
Goal

Expected behaviors

Direct line managers explicitly clarify the expected behaviours of each and every one of their employees

3. Mapping out a career development plan

Entering a career development plan



The screenshot displays the EPFL Performance system interface. At the top, the EPFL logo and 'Performance' are visible. The main heading is 'Setting objectives for 2024 - Unit 1 for First Name, Last Name'. Below this, there is a user profile section with a name 'First Name, Last Name' and a status 'Incomplete Items'. A navigation menu includes 'Route Map', 'Introduction', 'Employee information', 'Setting objectives for next year', 'Development objectives', and 'Expected behaviors'. The 'Development objectives' item is highlighted with a red magnifying glass. Below the menu is a 'Route Map' section showing a progress bar with four steps: 1. Objectives definition, 2. Employee's signature, 3. Manager Unit 1 Signature, and 4. Completed. The 'Introduction' section is partially visible at the bottom.

You can fill in career development objectives using the same objectives form discussed earlier. Simply open the next-to-last section in the menu at the center of your screen.

Entering a career development plan

EPFL Performance ▾ 2

[Reviews](#) Team Overview

[Back to: Inbox](#)

Setting objectives for 2024 - Unit 1 for First Name, Last Name

[Actions](#) [History](#)

First Name, Last Name ✓ 0
Incomplete Items

✎ 0
Supporting

[Route Map](#) [Introduction](#) [Employee Information](#) [Setting objectives for next year](#) [Development objectives](#) [Expected behaviors](#)

Route Map Hide

..... Assessment Signature Completed

1 Objectives definition ⓘ — **2** Employee's signature ⓘ — **3** Manager Unit 1 Signature ⓘ — **4** Completed

Introduction



Once you and your employee have completed the form, you'll need to click on the button on the bottom of the screen to advance to the next step, which is having the employee sign the form.

Entering a career development plan



The screenshot shows a dark-themed web interface for EPFL's performance management system. At the top left, the EPFL logo and "Performance" are visible. Below that, there are tabs for "Reviews" and "Team Overview", and a "Back to: Inbox" link. The main heading is "Setting objectives for 2024 - Unit 1 for" followed by a placeholder "First Name, Last Name". On the right, there are icons for "Actions", "History", and a "Supporting" button with a "0" count. A white notification box is overlaid on the screen with the title "Finalize the objectives definition" and a circled "i" icon. The text inside the box reads: "You are about to route this form to another person to gather signatures. This form is sent in read-only format and goes to your recipient's Inbox. A copy of the form is also sent to your En Route folder." Below the notification, a "Route Map" section is partially visible. A red arrow points from the notification box to a blue button at the bottom right of the screen that says "Finalize the objectives definition". Another red arrow points from the text box to this button. The text box contains the following text: "Once you and your employee have completed the form, you'll need to click on the button on the bottom of the screen to advance to the next step, which is having the employee sign the form."

Finalize the objectives definition ⓘ

You are about to route this form to another person to gather signatures. This form is sent in read-only format and goes to your recipient's Inbox. A copy of the form is also sent to your En Route folder.

Route Map

Once you and your employee have completed the form, you'll need to click on the button on the bottom of the screen to advance to the next step, which is having the employee sign the form.

Finalize the objectives definition

Employee signature

EPFL Performance ▾

Reviews Team Overview

Back to: Inbox

Setting objectives for 2024 - Unit 1 for First Name, Last Name

Actions History

First Name, Last Name ✓ 0 Incomplete Items 0 Supporting

Route Map Introduction Employee Information Setting objectives for next year Development objectives Expected behaviors

Route Map Hide

Assessment Signature Completed

1 Objectives definition 2 Due 15/06/2024 Employee's signature 3 Manager Unit 1 Signature 4 Completed

Actions

Introduction



Employees

You can get to the signature page using any of the three methods described at the start of this tutorial. On this page, you'll be shown a summary of your objectives and career development plan. You can either approve or refuse them, adding a comment if you'd like. If you refuse the objectives, the system will return to the discussion step so that you can discuss the outstanding issues with your manager.

EPFL Performance ▾

Reviews Team Overview

Back to: Inbox

Setting objectives for 2024 - Unit 1 for First Name, Last Name

Actions History

First Name, Last Name ✓ 0 Incomplete Items ✎ 0 Supporting

Route Map Introduction Employee Information Setting objectives for next year Development objectives Expected behaviors

Route Map Hide

Assessment Signature Completed

1 Objectives definition 2 Employee's signature 3 **Due 15/06/2024 Manager Unit 1 Signature** 4 Completed

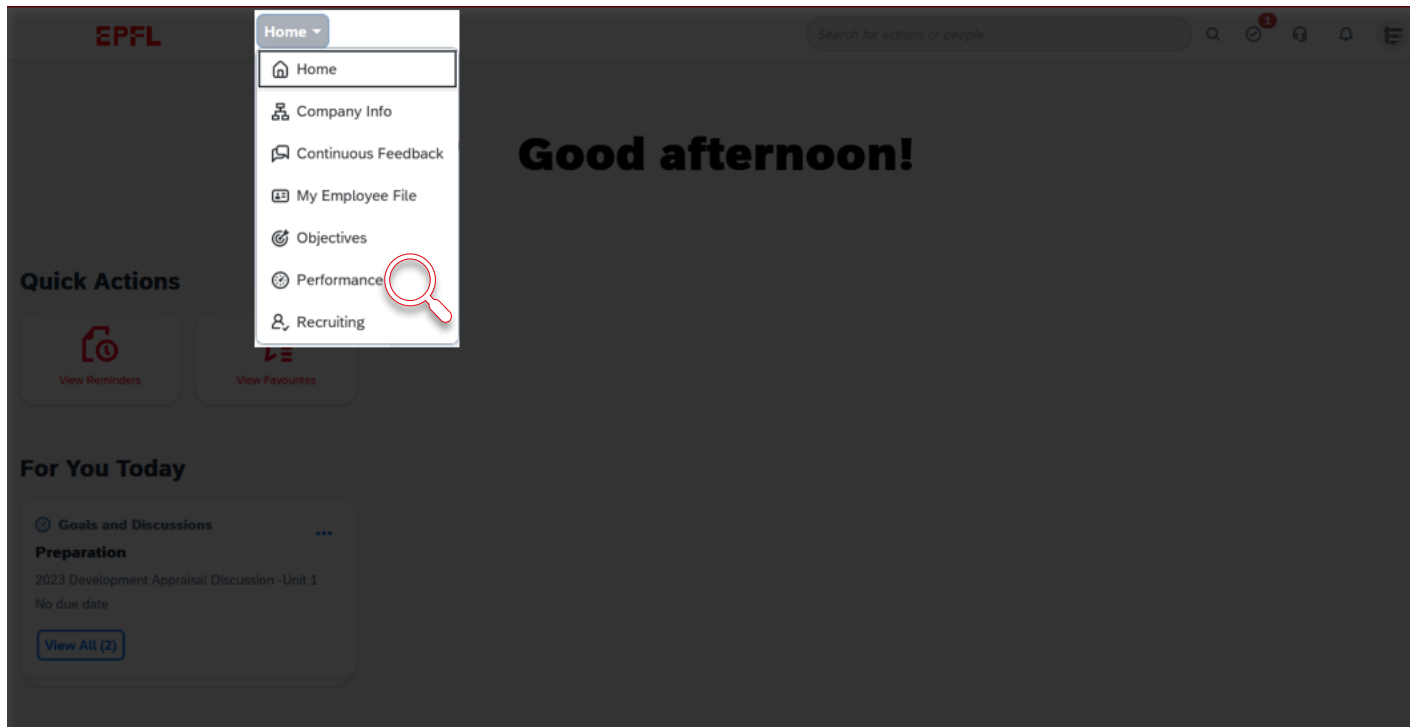
Introduction



Manager

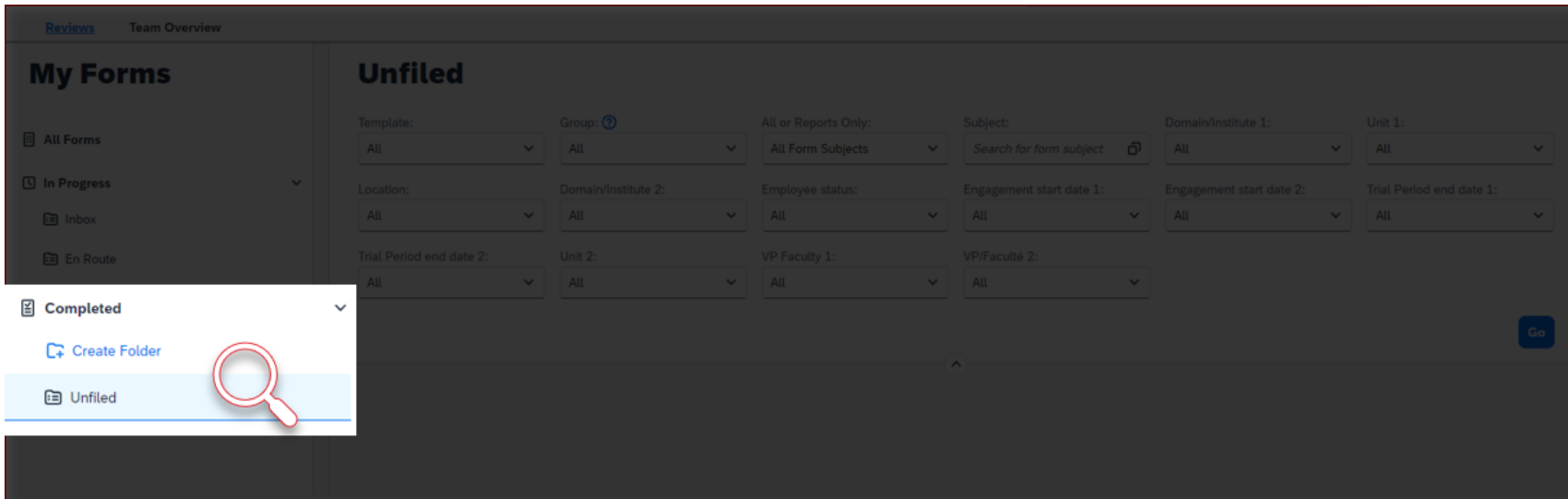
After your employee signs the objectives form, it will automatically be sent to you for your final signature. You can add an overall comment if you wish (which can be seen by the employee) to conclude this step.

Viewing objectives forms from previous years



It's possible for you to view objectives forms for the coming year as well as prior years. For that, you'll first need to select "Performance" in the pages menu.

Viewing objectives forms from previous years



The screenshot displays the 'My Forms' interface. On the left, a sidebar shows a list of folders: 'All Forms', 'In Progress', 'Inbox', 'En Route', and 'Completed'. The 'Completed' folder is expanded, showing a 'Create Folder' button and the 'Unfiled' folder, which is highlighted with a red magnifying glass. The main area is titled 'Unfiled' and contains a grid of filter options for searching forms, including Template, Group, All or Reports Only, Subject, Domain/Institute 1, Unit 1, Location, Domain/Institute 2, Employee status, Engagement start date 1, Engagement start date 2, Trial Period and date 1, Trial Period end date 2, Unit 2, VP Faculty 1, and VPI/Faculté 2. A 'Go' button is located in the bottom right corner.

Then, on the performance page, you'll see a "Completed" option at the left of the screen. Click on "Unfiled" to see a list of completed objectives forms.

You can create folders to store completed forms by clicking on "Create Folder" (as shown here). If you have many completed forms, use the filters to help you search among them.

The following tips can help you make sure the process goes smoothly:



Both managers and employees should set aside enough time to discuss objectives together before they're entered in the application.

Set objectives that are realistic, relevant to employees' duties, measurable, attainable and sufficiently challenging. We suggest you choose between three and five objectives.



For managers, design career development plans that support your employees in reaching their objectives and in their skills development.



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>Now available</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

