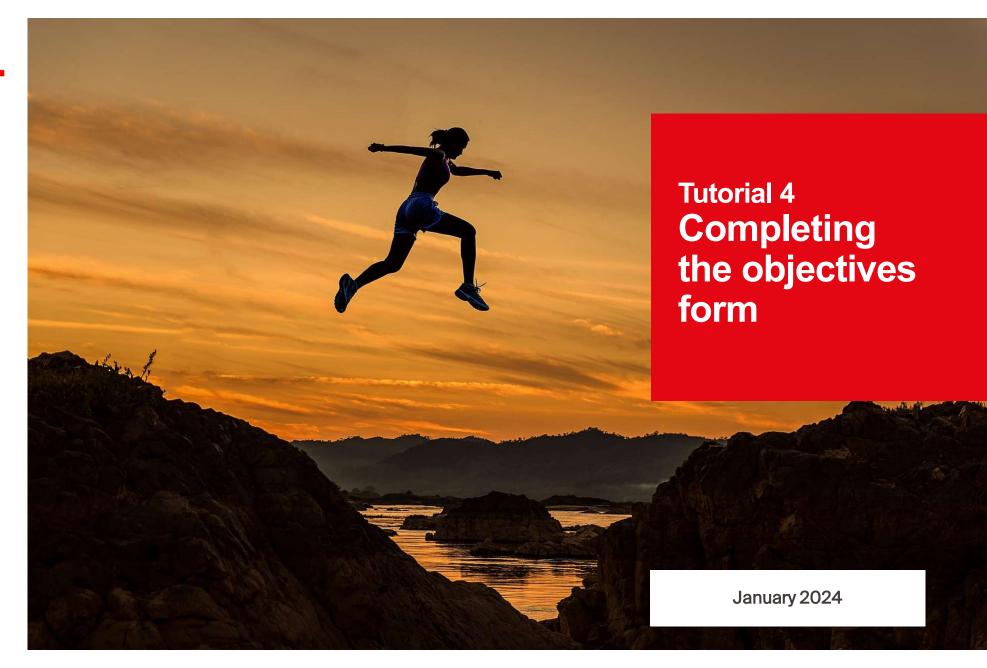
EPFL



 École polytechnique fédérale de Lausanne

EPFL Contents

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





1. Background

EPFL Objectives of this tutorial

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.

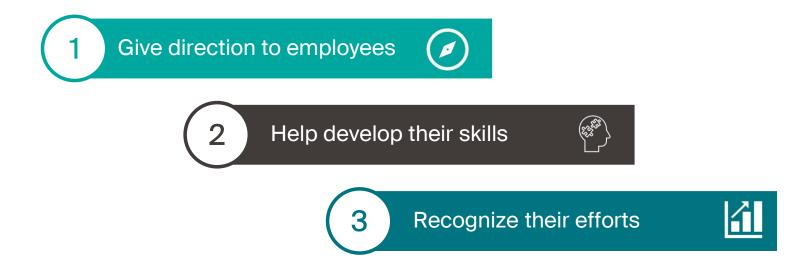
To learn more about the overall performance review process or specific steps of the process, we suggest you have a look at one of the other tutorials in the series. A list is given at the end of this presentation.

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

EPFL Why are performance reviews important?



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.

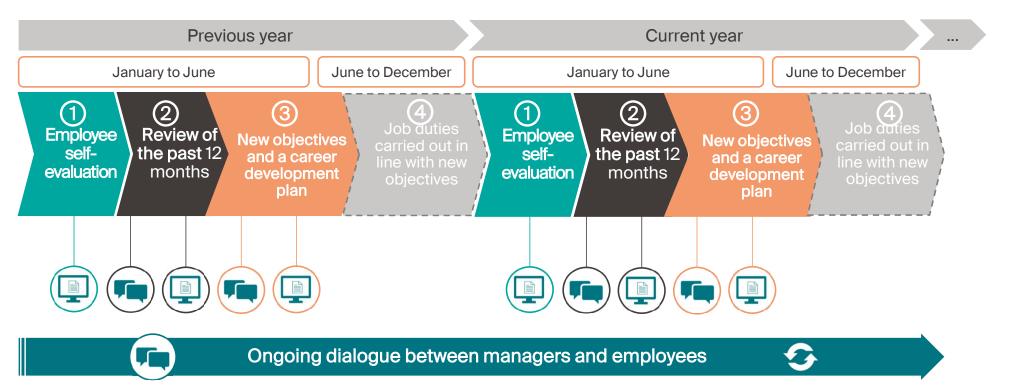


Look to the **future** by setting objectives and mapping out a career development plan.



Assessments over 12 months





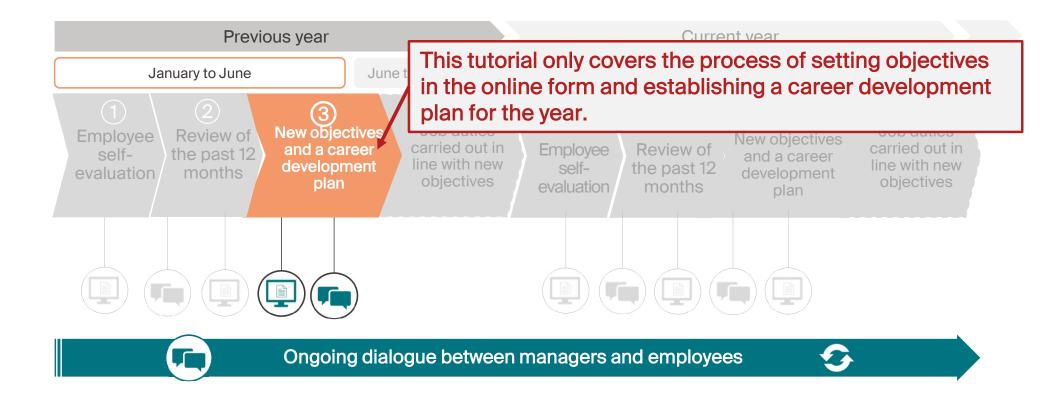
Legend



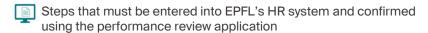
Steps involving discussion between managers and employees



Assessments over 12 months

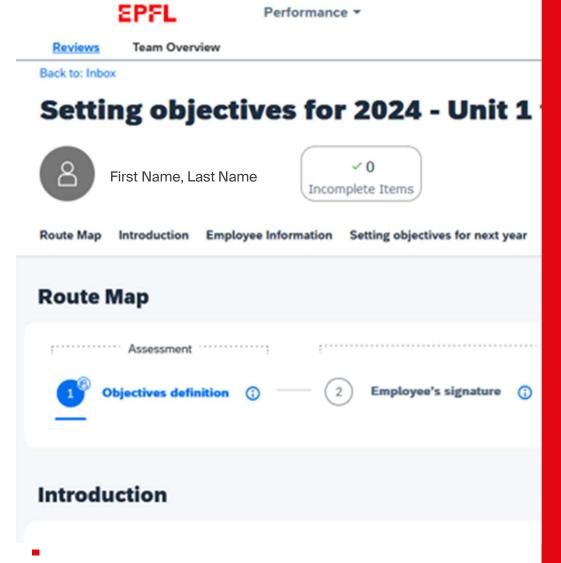


Legend



Steps involving discussion between managers and employees

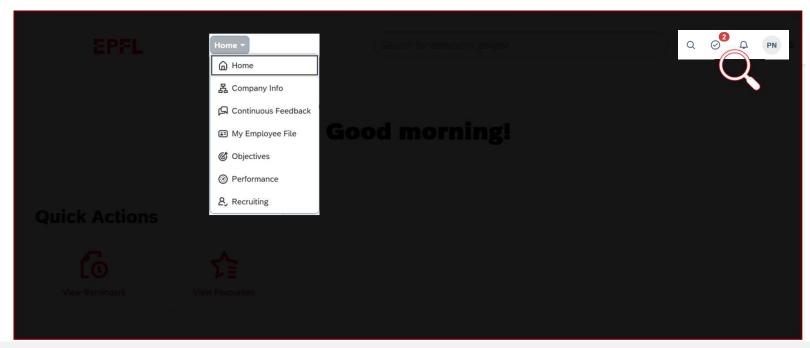




2. Setting objectives



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

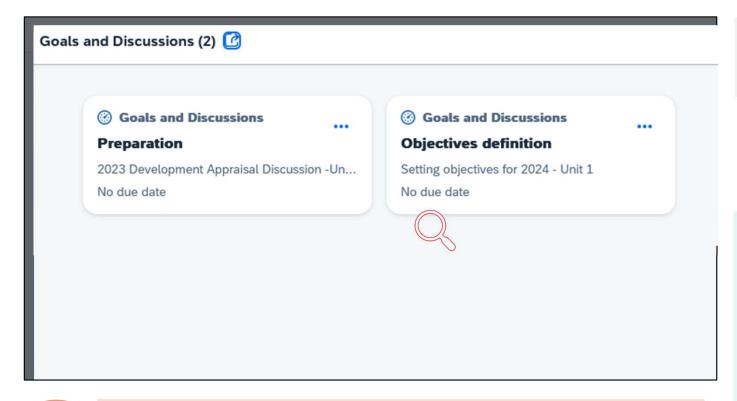


The first way to open the objectives window is through the reminders box in the lower left corner of the dashboard. You'll need to click on "View All."



Managers

1. From the reminders box

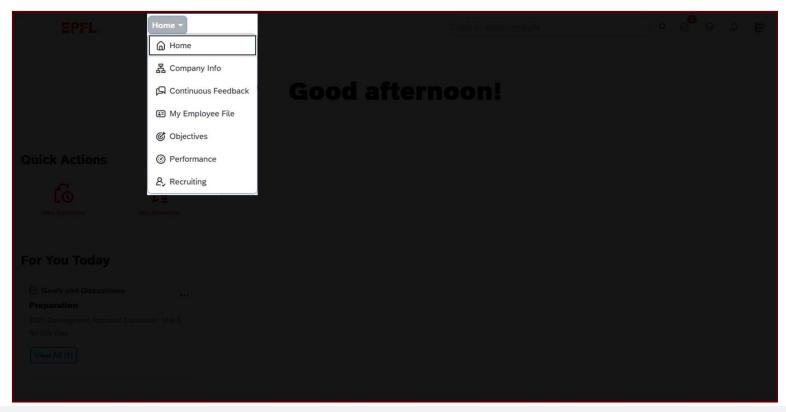


You will see several boxes, one for each employee in your unit. You'll need to complete one objectives form for each employee you review. In the Goals and Discussions window, click on "Objectives definition."



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.

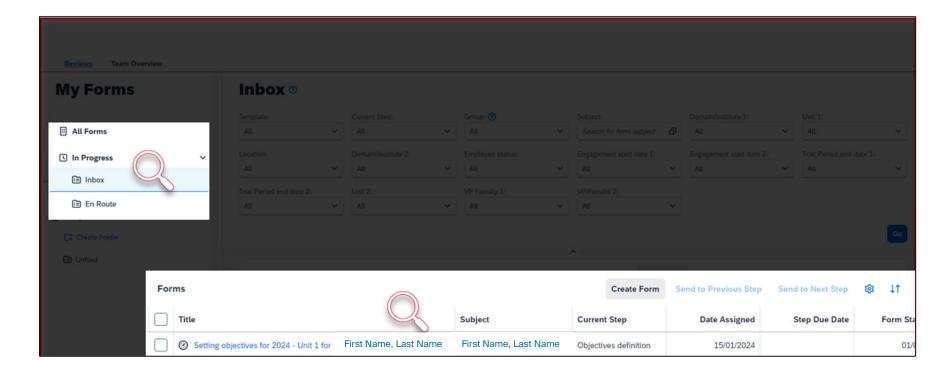
EPFL 2. From the performance page



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.

EPFL

2. From the performance page



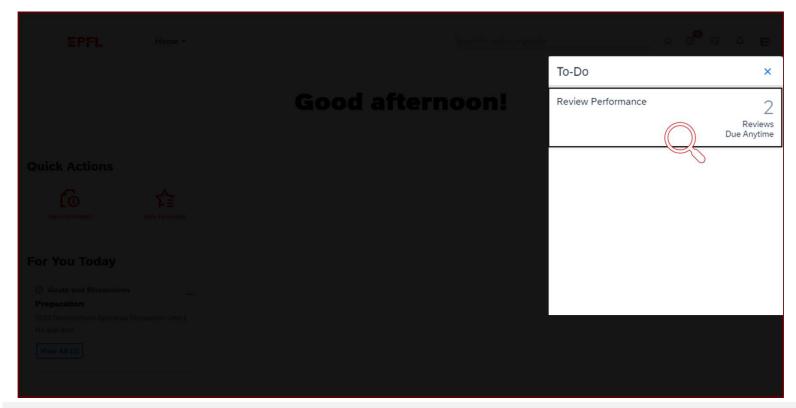
When the performance page opens, the "Inbox" option will be selected in the menu on the left. A list of forms to fill out will appear in the center of your screen. Select the objectives form for either yourself or the employee you plan to review.

EPFL 3. From the toolbar



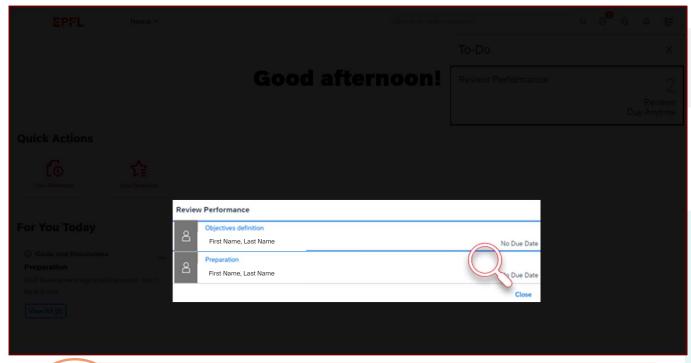
The third way to open the objectives window is through the toolbar in the upper right corner of the dashboard. Click on the tasks icon, which is the second from the left.

EPFL 3. From the toolbar



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

EPFL 3. From the toolbar



Managers

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 "Review Performance" window will appear, where you should select "Objectives definition."

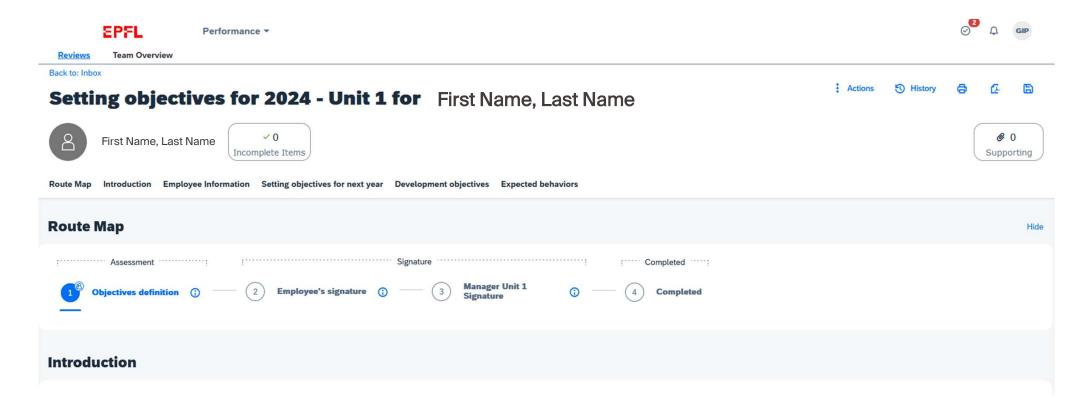


If you're assigned to two or more EPFL units:

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.

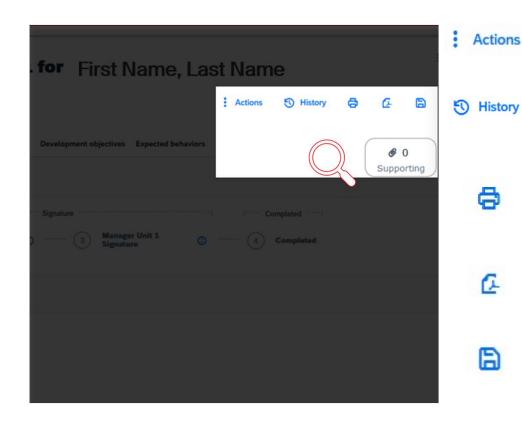
EPFL

The objectives window



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

EPFL Using the objectives window toolbar





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.

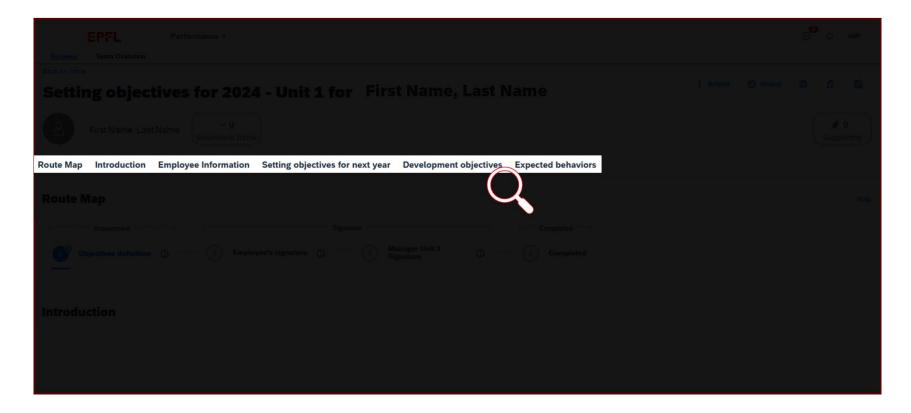


Actions

8

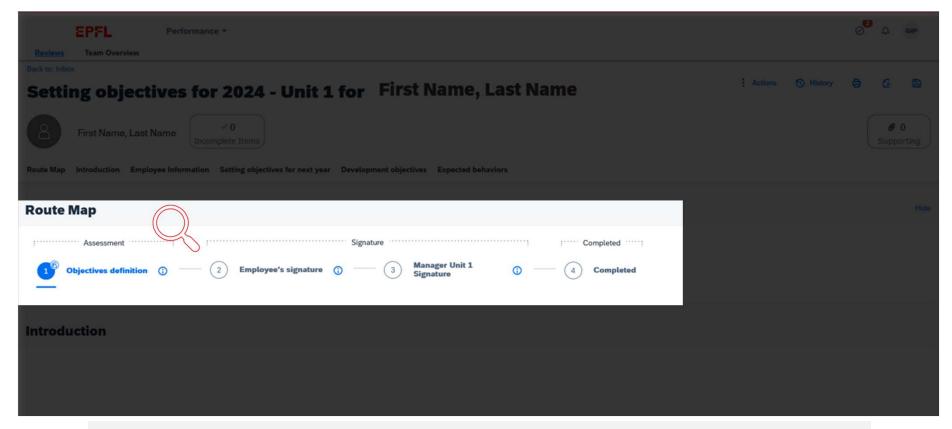
Œ

Sections of the objectives window



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.

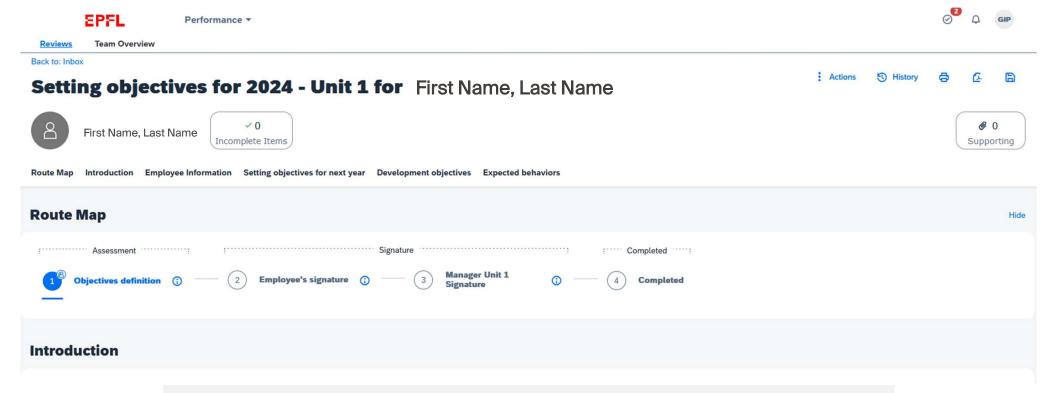
EPFL Route Map section



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

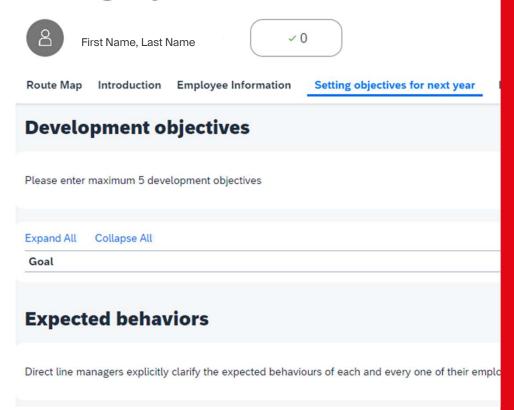


Use this page to set your objectives jointly with your manager. Together, you can enter specific objectives. You should ideally schedule a meeting to discuss the objectives and make sure your expectations are aligned.



Back to: Inbox

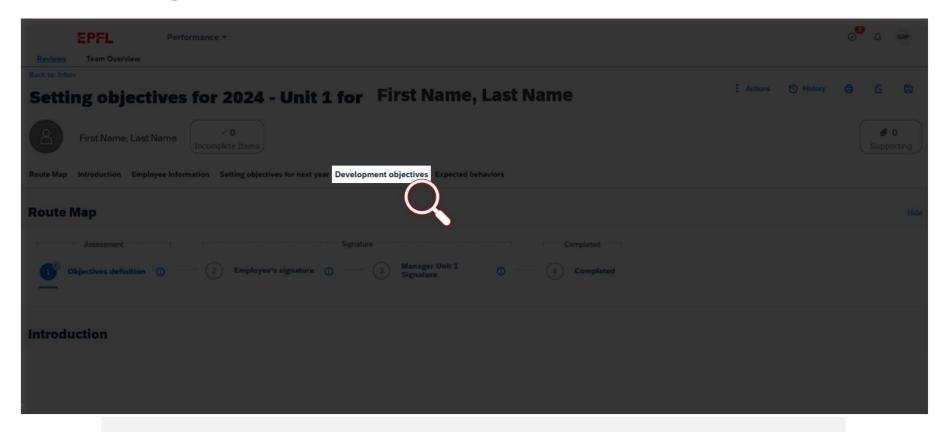
Setting objectives for 2024 - Unit 2 for



3. Mapping out a career development plan



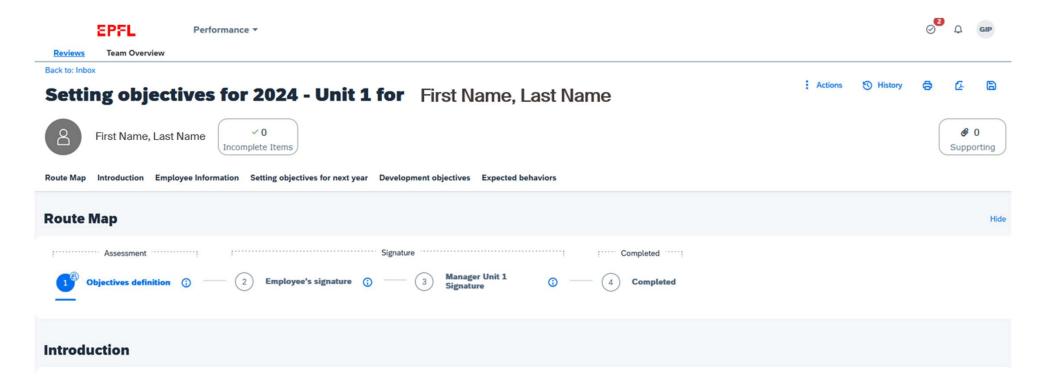
Entering a career development plan



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

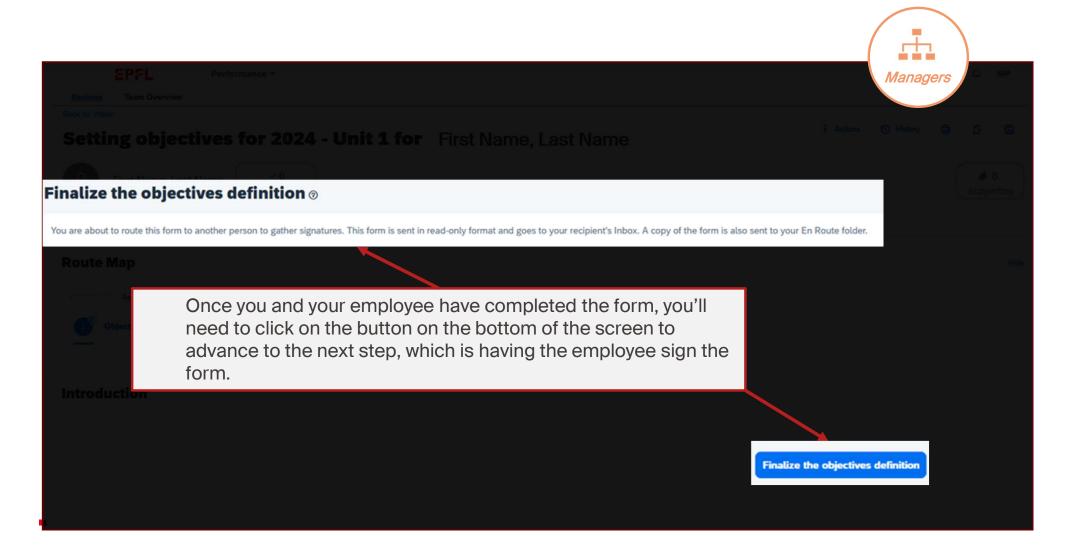


Managers

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.

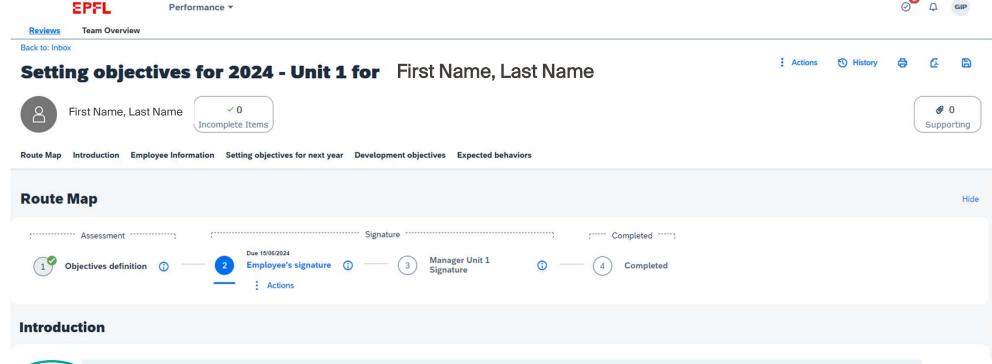


Entering a career development plan





Employee signature

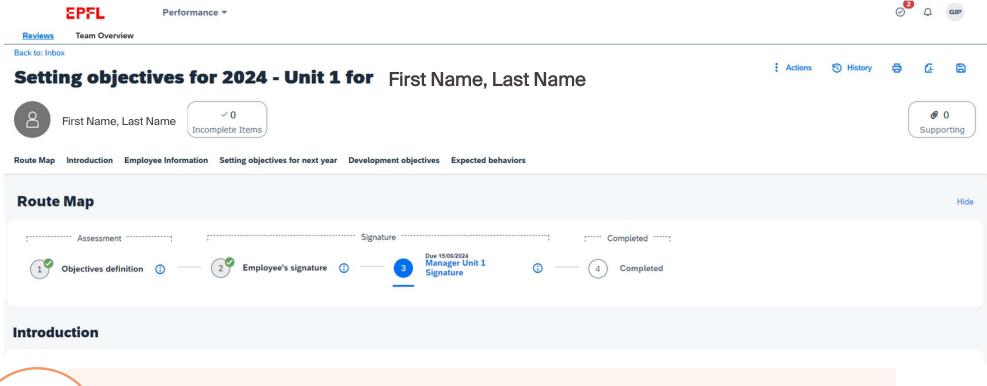




You can get to the signature page using any of the three methods described at the start of this tutorial. On this page, you'll be shown a summary of your objectives and career development plan. You can either approve or refuse them, adding a comment if you'd like. If you refuse the objectives, the system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



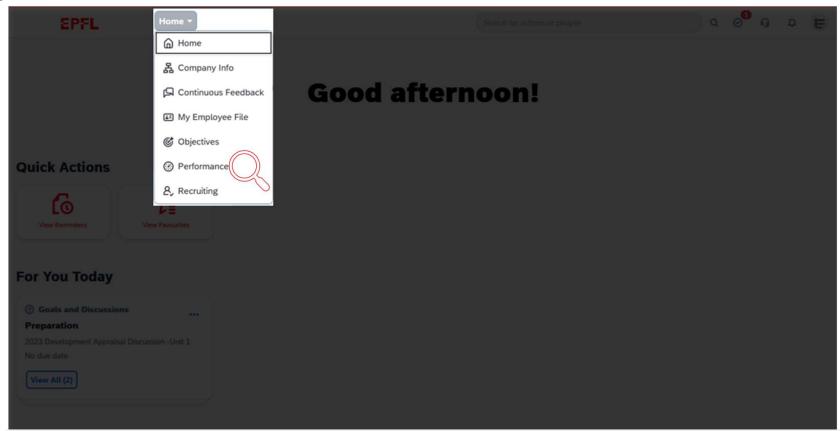
Manager signature





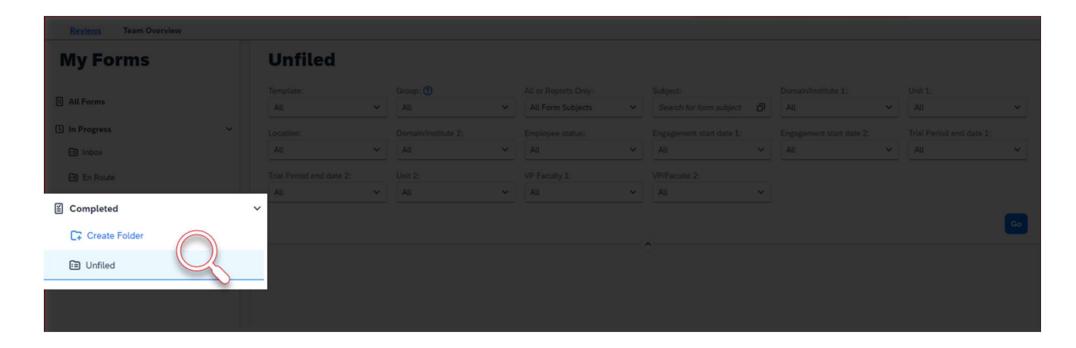
After your employee signs the objectives form, it will automatically be sent to you for your final signature. You can add an overall comment if you wish (which can be seen by the employee) to conclude this step.

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



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.



Helpful Tips

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. Please note you can set a maximum of 5 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 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 Now available
Tutorial 5	Giving and receiving feedback Available from 16 February 2024

EPFL Your turn!

Speaker



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

