



SuccessFactors Guide

SuccessFactors Technical Guide

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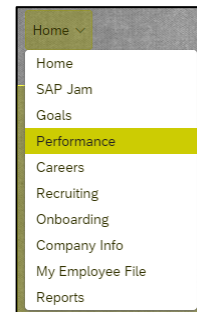
Logging in to SuccessFactors

- Sign in to my.urbn.com and navigate to SuccessFactors by clicking on the SAP SuccessFactors Icon



Accessing the Performance Review Form

- The Performance Review Form may be accessed from the navigation drop-down menu by selecting Performance



- Click on the FY 19 Performance Review in the SuccessFactors inbox

FY19 URBN Performance Form

The Route Map below indicates which stage the Review Form is in currently.

The Support and Resources section includes a list of documents to support the employee and manager in completing the Review form.

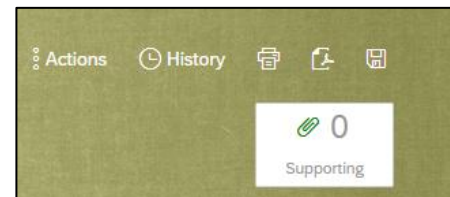
Complete the entire form or click on each section title to go directly to that section.



Performance Form Shortcuts

In the upper right-hand corner there are several shortcut icons:

- Actions is used to spell check the form
- History keeps track of the form's current stage
- Print icon to print individual sections or the entire form
- The PDF icon saves the form as a PDF
- Saves the form
- The attachment icon to add any supporting documents as comments are limited to 4,000 characters



Part I: LY Goal Achievement

- Ensure that any Goals that were set in FY19 are listed in this section
- Remember, this section will include Statistical, Development and Job Goals
- If any Goals are missing, click + Add Goal

- Enter the Goal Name, Desired Outcome, Weight, and if necessary, change the Start and End date
- Click Save Changes
- Repeat the above steps for each FY19 Goal that needs to be added
- Weight of all goals combined should equal 100%

- Goals can be deleted or edited using the trash bin or pencil icons
- For each goal, use the buttons to rate. Hover over the ? to see a definition of each rating
- Include any comments regarding specific examples to support the rating
- Continue to add additional goals or rate existing goals
- Click on Other Detail to shrink the bottom portion of the goal section

Part II: Fiscal Year Highlights and Opportunities

Use Fiscal Year Highlights to talk about contributions and accomplishments beyond what was already recorded in the goal section goals.

Use the Opportunities sections to indicate areas to focus and improve on in based on this year.

These are both required fields and are limited to 4,000 characters.

Part II: Fiscal Year Highlights and Opportunities

Part II: Fiscal Year Highlights and Opportunities

Employee: Review the previous fiscal year. Beyond your goals, what were the highlights and opportunities?

Manager: Use this section to give employee specific feedback about their high points and opportunities.

Note: There is a 4,000 character limit for comment boxes.

* Employee Fiscal Year Highlights

B I U | L B S | P A Z |

This is a required field. The form will not route if it is empty.

* Employee Opportunities

B I U | L B S | P A Z |

This is a required field. The form will not route if it is empty.

Part III: Career Aspirations and Developmental Goals for the Current Fiscal Year

Use this section to talk about future growth and career with the company, and any type of developmental goals for the to explore in the upcoming year.

This is a required field and has a 4,000-character limit.

Part III: Career Aspirations and Development Goals for Current Fiscal Year

Part III: Career Aspirations and Development Goals for Current Fiscal Year
 Employee: Use this section to share your career aspirations, how you would like to grow with the company, and skills you would like to develop further.
 Manager: Use this section to discuss your employee's career aspirations and development goals for the upcoming year.

Note: There is a 4,000 character limit for comment boxes.

*Employee Career Aspirations & Development Goals

B / U | **I** **D** **A** **T** | **L** **S** | **C** **O** **E** | **S** **P** **E** **R** **A** **T** **O** **R** **S** | **A** **Z** |

This is a required field. The form will not route if it is empty.

Part IV: Overall Comments

This section may be used to make any general observations or summarize for the previous year.

This is not a required field, but still has a 4,000-character limit

Part V: New Goals for the Coming Year

At this point add suggested goals for FY20

- Click + Add Goal
- Click Add Goal to enter the required information for each New Goal or use the SMART Goal Wizard, for help in creating a Goal

- Enter the Goal Name, Desired Outcome and Weight. Then click Save Changes
- Complete these steps for each New Goal that you want to add
- Each Goal must be given a weighting to support its impact to the business. Total weight of all goals must equal 100%

These Goals will be automatically pushed to the FY20 Goal Plan, which will remain open and editable throughout the year to facilitate touch base conversations or amended at any time.

Saving, Closing & Sending to Manager

- Select Save and Close at any time to return and complete your Self-Review
- *Note: If Cancel is selected, all changes will be lost, and the system will return to the Forms page
- When the form is complete, click Finalize Form

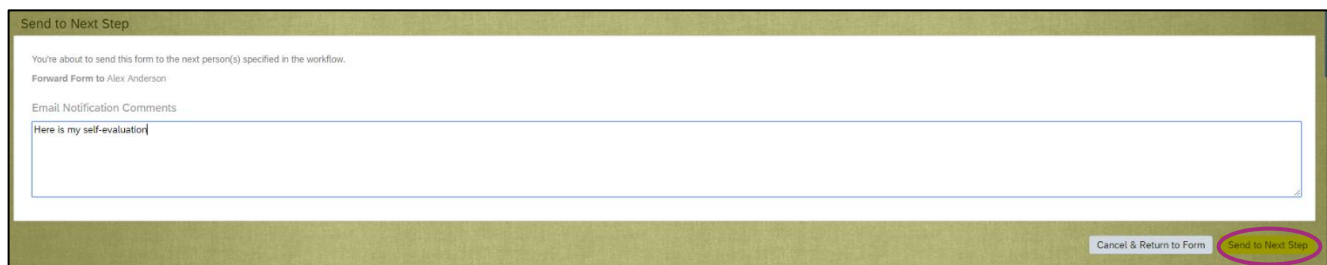


Signatures

Manager: *Alex Anderson has not signed yet*

Cancel Save and Close **Finalize Form**

- Add any comments and click on Send to Next Step



Send to Next Step

You're about to send this form to the next person(s) specified in the workflow.
Forward Form to Alex Anderson

Email Notification Comments

Here is my self-evaluation

Cancel & Return to Form **Send to Next Step**

The form will now be available to your manager to review and complete.

Support and Resources

Additional support and resources are available on the Community site under Life & Career, Talent, [Performance](#)

Technical Support

For additional technical support, contact sfsupport@urbn.com

SuccessFactors Manager Instructions

Access the employee review form in your inbox SuccessFactors inbox. The employee's ratings and comments will be displayed. Complete each section of review form, completing your ratings and adding comments to the manager's comment boxes.

Part I: LY Goal Achievement

- These should be the Goals that were agreed upon for FY19
- Remember that this section should include all Statistical, Development and Job Goals
- Make any needed updates to the Goal. Edit Goals if necessary, by clicking the Pencil Icon, then click Save Changes
- Rate each goal and add any comments
- Click on Other Details at the bottom of the screen to hide the goals details

Goals

1.1 Sample FY '19 Goal

Complete the FY '19 Sample Goal

* Rating 3.0 - Met Expectations

Manager (Click on the buttons below to choose the rating for the goal achievement: Did Not Meet, Partially Met or Met.)

The goal was completed on time and met expectations

Goal Details Other Details

Employee Comments

Rating 3.0 - Met Expectations

Employee's Comments

This goal was completed on time

Part II: Fiscal Year Highlights and Opportunities

This section is used to document any highlights and achievements from the previous year as well as to identify opportunity areas. The employee comments show above the box for manager comments.

These are both required fields and have a 4,000-character limit.

Part II: Fiscal Year Highlights and Opportunities

Part II: Fiscal Year Highlights and Opportunities

Employee: Review the previous fiscal year. Beyond your goals, what were the highlights and opportunities?

Manager: Use this section to give employee specific feedback about their high points and opportunities.

Note: There is a 4,000 character limit for comment boxes.

Employee Fiscal Year Highlights

* Employee Fiscal Year Highlights - Manager

Took on a larger role in.... Took on training new hires.... etc.

Add Manager Comments

Employee Fiscal Year Opportunities

* Employee Fiscal Year Opportunities - Manager

Need to do a better job on setting priorities and meeting deadlines. With the additional responsibilities I let some thing slip.

Add Manager Comments

Less

Part III: Career Aspirations and Development Goals for Current Fiscal Year

This section is used to ensure that there is a development conversation as part of the annual process and that the manager and employee has an opportunity to set developmental goals for the employee.

Managers should add their comments below the employee comments.

Part III: Overall Comments

This section is optional but may be a place to provide an overall summary of the previous year or to help set a vision and inspiration for the upcoming year.

Part III: New Goals for the Coming Year

The employee and the manger should discuss and formalize goals for the upcoming year. Using information from the Opportunities and Career Aspirations and Developmental goals section, along with any fiscal or business goals.

Goals stay open for the entire year and do not need to be completed as part of the annual review process.

Managers may close the form before finalizing goals.

Saving, Closing & Printing

- Click Save and Close at any time, to complete the Review at another time



Manager: *Alex Anderson has not signed yet*

Cancel Save and Close Finalize Form

*Note: Clicking Cancel will exit the Review Form without saving and return to the Forms page

At this point in the process you should **NOT select Finalize Form**. This button will close out the form and send it to your Employee. They will be able to see any information that you have entered.



Send to Next Step

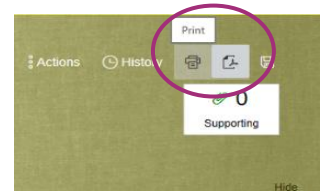
You're about to route this form to another person to gather signatures. This form is sent in read-only format, and goes to your recipient's inbox. A copy of the form is also sent to your En Route folder.

Forward Form to Alex Anderson

Cancel & Return to Form Send to Next Step

When you are satisfied with the Review Form, print copies of the Review for your conversation with the employee.

- Choose the print Icon and select the print options below
- Select the print options and print to review with the employee



 A screenshot of the 'Sections to include' dialog box. It contains a list of sections with checkboxes: 'All Sections' (checked), 'Support and Resources' (unchecked), 'Part I: LY Goal Achievement' (checked), 'Part II: Fiscal Year Highlights and Opportunities' (checked), 'Part III: Career Aspirations and Development Goals for Current Fiscal Year' (checked), 'Part IV: Overall Comments' (checked), 'Part V: New Goals for the Coming Year' (checked), and 'Signatures' (checked). Below this list are two unchecked options: 'Include section introductions' and 'Include sections details (where applicable)'. At the bottom right, there are 'Cancel' and 'Print' buttons, with the 'Print' button circled in red.

Signing & Sending to Employee

- Once the Review and Goal conversation has been completed, make any changes necessary to the form, then select Finalize Form

 A screenshot of the 'Manager:' field in the Review Form. The text 'Alex Anderson has not signed yet' is displayed. At the bottom right of the form, there are three buttons: 'Cancel', 'Save and Close', and 'Finalize Form'. The 'Finalize Form' button is circled in red.

- Choose Send to Next Step to sign off on the review

 A screenshot of the 'Send to Next Step' dialog box. It contains the text: 'You're 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 this text, it says 'Forward Form to Alex Anderson'. At the bottom right, there are two buttons: 'Cancel & Return to Form' and 'Send to Next Step'. The 'Send to Next Step' button is circled in red.

Closing

- Sign the form to close it

Manager: *Alex Anderson has not signed yet*

Cancel Save and Close Return to Evaluation **Sign**

This is the final opportunity to go back and make any changes to the form.

- To review the form once more or make additional changes, click Cancel & Return to Form
- If closing the form, click Sign

You're about to submit this form for completion. A copy of the form will be sent to your Completed folder.

Cancel & Return to Form **Sign**

Completed forms can be found by clicking on Completed in My Forms.

My Forms

- All Forms
- In Progress
- Completed
- Form Status

Remember, the new Goals that were created will be automatically pushed to the FY20 Goal Plan, which will remain open and editable throughout the year. It can be accessed by you or your Employee to facilitate touch base conversations or amended at any time by choosing Goals from the drop down.

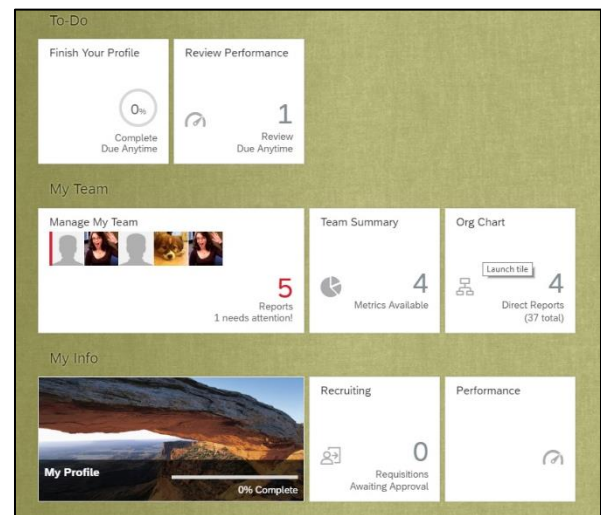
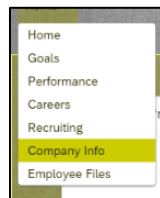
Goals ▾

- Home
- SAP Jam
- Goals**
- Performance
- Careers

Managing the Org Chart

Your Org Chart can be accessed by choosing Company Info from the drop down or by clicking on the Org Chart tile on the home page.

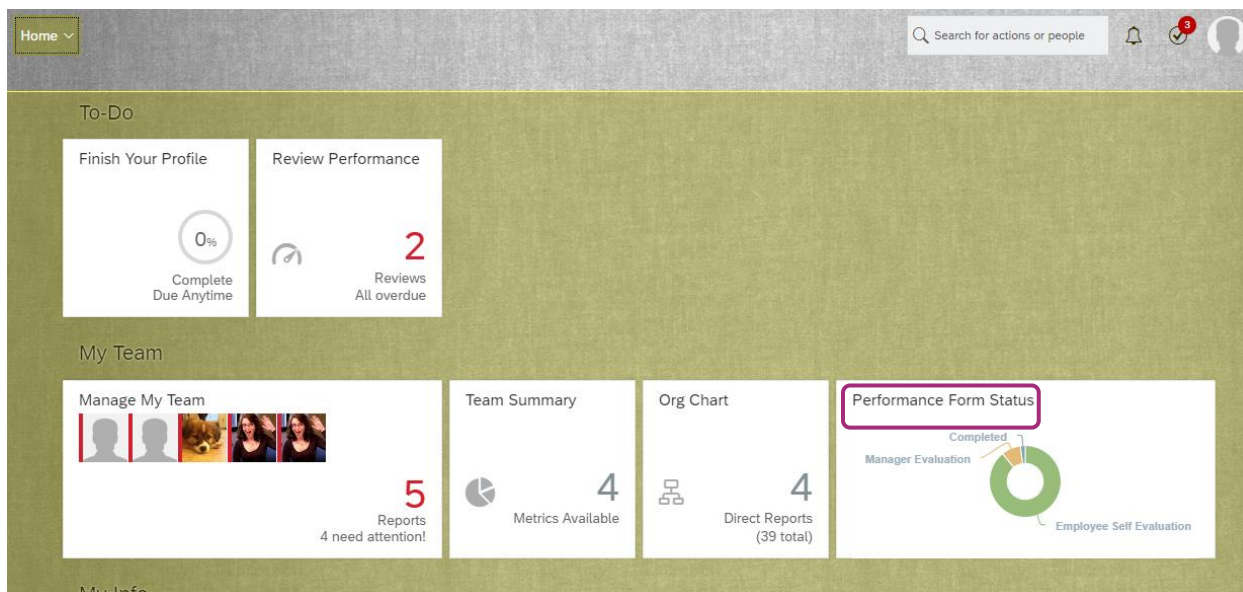
If there are changes that need to be made to the Org Chart, please have the manager email SFSupport@urbn.com



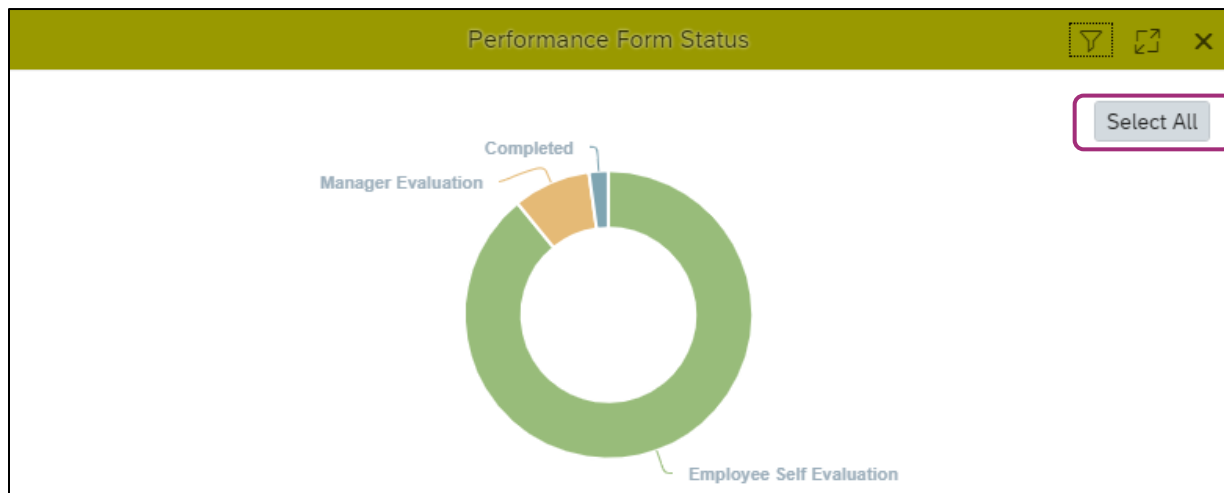
Visibility to Skip Level Appraisals

Managers have access to review Skip Level Employees. On every managers' homepage the Performance Form Status tile will show the status of the appraisals for the direct reports of your direct reports as allow you to view the form.

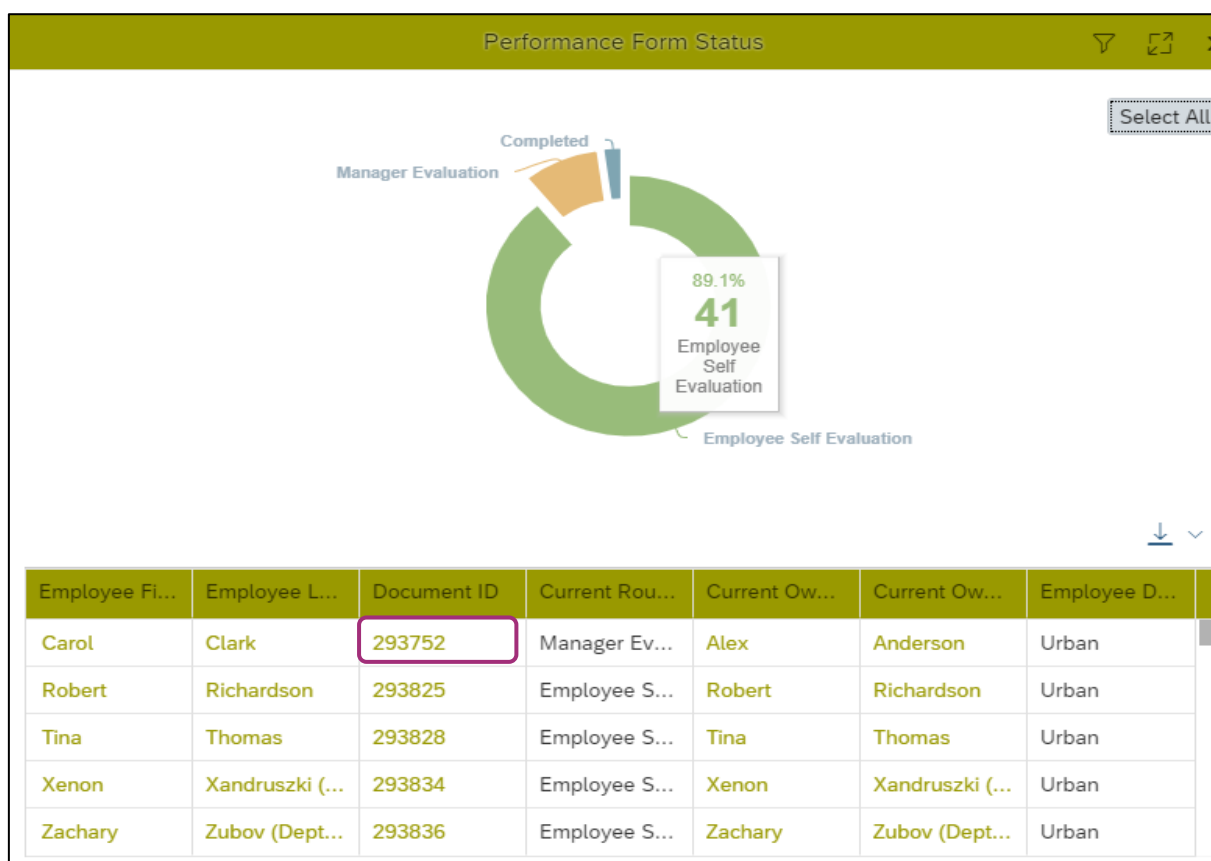
- Double click on tile to expand it



- Click on Select All to see a complete list of the employee appraisals for your direct reports
- To see the reports in a certain status, click on that status



- Click on Document ID to be taken to the form



The form will open in a separate window and will be shown in its current state.

The form is view only and will not be able to be edited.