Much of the administrator’s work is done by maintaining the system after its initial launch (GoLive). In addition to the Setup Wizard, administrators can use Admin Tools throughout the year to make changes to users, forms, and permissions based upon HR events within the company.

System administration includes:
- Manage user information (data imports, passwords, notifications)
- Manage user permissions and privileges
- Manage forms, competencies and roles, system notifications
- User support (forgotten passwords and issues with forms)
- Provide necessary assistance and support for HR managers
- Implement and train/communicate users on new functionality
- Provide reporting assistance to users (HR, management)
- Provide coaching assistance to managers and employees
Introduction to the System

Admin Home Page
The Professional Edition is fast and easy to set up, and includes built-in recommendations for best practices. As an administrator you have access to additional features and functionality throughout the system. Let’s start with your Home page:

1. Upon logging in, the Home page is displayed. Home provides access to all the activities and processes in the system, including the Setup Wizard and Admin Tools.
2. Use the drop-down navigation menu in the header to go to a section within the system. Select Home from the list to return to the main page.
3. Click the arrow next to your name to access the Options menu, Proxy Now tool, Admin Tools, and to Logout of SuccessFactors.
4. Enter a name in the People search field to quickly view a colleague’s Public Profile information.
5. The Home page is made up of tiles that can be configured based upon your selections. Click to make changes to the information displayed in the tile.
6. My Admin Favorites provides quick links to your preferred administrative tasks.

Sections
Use the drop-down menu to go to a specific section within the system. Select Home to return to the main page. The sections that are listed in the drop-down menu vary by role (e.g., manager, employee, administrator) and permissions granted to the user.

Select ... | What they are used for:
--- | ---
Jam | Social networking tool that provides improved communication and collaboration between individuals and teams within the company.
Goals | Create and track progress on business goals.
Performance | Access performance review and 360° forms.
Compensation | Recommend merit increases, promotions, and other compensation related items.
Talent | Search for talent to assemble a project team or evaluate readiness in the company.
Employee Files | Review employees’ Profiles listing their skills, backgrounds, experiences, and interests.
Company Info | View an interactive company directory and materials explaining company and system processes.
Reports | Gain visibility and oversight into performance across the company.
Admin Tools | Control the activities in the system.
Introduction to Administration Tools

Admin Tools
Admin Tools is a robust feature designed to help you manage and customize SuccessFactors for your organization’s business needs. From the main Administration Tools page, you can quickly configure and implement SuccessFactors features for your users, make changes to your current configuration, and manage your users and data. Oversee the daily management of the application, empower users, and customize the SuccessFactors environment to implement and further embrace your organization’s business processes.

The main Administration Tools page is organized into sections:

1. Use the Setup Wizard to configure the different features and functionality that you want to include in your instance of SuccessFactors. NOTE: If you have not started or completed the wizard, refer to the SuccessFactors Setup Wizard Quick Reference Guide for assistance.

2. Use Company Processes & Cycles to start processes and manage forms and system features. Click a topic (e.g., Goal Management) to view actions that can be taken.

3. Use Manage Employees to manage your system users and ensure they have access to features and are given permission to take action within the system.

4. Links to common administration tasks related to employees are listed for quick access; including Reset User Account, Reset User Passwords, Send User Welcome Email, and Proxy Management.

Additional tools and resources are listed along the right side of the screen for quick access and reference. These include:

5. Admin Tool Search allows you to search for admin tools using key words. Example: Enter “Password” to bring up the tools for resetting the passwords for users.

6. My Favorites lists the common admin functions you have bookmarked to appear on Admin Tools and the Home page.

7. News & Updates contains system related information from SuccessFactors.


Quick Tip
If there are administration tasks that you complete on a regular basis, for example, Launch Forms, you may add a link to the task to your My Favorites tile in Admin Tools. This way you can quickly access the tools that you use most frequently.

1. When you are in an Admin Tools section, e.g., Goal Management, place your mouse over a task link.
2. Click the ★ that appears at the beginning of the link to add the link to My Favorites.
3. When a link is selected, you may click ★ to remove the link from My Favorites.
Company Processes & Cycles

Use *Company Processes & Cycles* to start processes and manage forms and system features. Select a topic to view the options permissioned for the admin.

**Select ... To ...**

**Goal Management**
- Create a Goal Plan for your organization and manage system activities related to goal management.

**Performance Management**
- Manage system activities related to performance management including managing forms, processes, form components, and features.

**360 Reviews**
- Manage system activities related to 360° reviews including managing forms, processes, form components, and features.

**Compensation**
- Manage system activities related to compensation, bonus, and promotions for employees. Configure compensation templates and launch and manage plans.

**Talent**
- Assign talent management permissions and configure talent resources.

Manage Employees

Use *Manage Employees* to manage your system users.

<table>
<thead>
<tr>
<th>Select ... To ...</th>
<th>To ...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goal Management</strong></td>
<td>Create documents and change their status, settings, and business information. You can locate individual or groups of documents to perform tasks.</td>
</tr>
<tr>
<td><strong>Performance Management</strong></td>
<td>Enter users in the system and change their status, settings, and business information. You can locate an individual or group of individuals to perform tasks.</td>
</tr>
<tr>
<td><strong>360 Reviews</strong></td>
<td>Specify who can manage role-based permissions in the system.</td>
</tr>
</tbody>
</table>
| **Compensation** | Common Tasks

Common tasks related to Employees are listed for quick access. Regularly occurring activities related to Employees include:

- **Reset User Account**
  - Reset an inactive user account. Use whenever a user locks him/herself out of the system.

- **Reset User Passwords**
  - Reset current user passwords. You can reset an individual user password with a supplied password or enable a user or group of users to reset their passwords via email notification.

- **Send User Welcome Email**
  - Send email notifications to an individual or group of system users. The email subject and body text contains the default Welcome message, which can be edited.

- **Proxy Management**
  - Make new proxy assignments, look up existing proxy relationships, or change the proxy settings for the company. The Proxy feature allows an employee to authorize another employee to work in their account on their behalf.
Admin Tools: Goal Management

Goal Management
If you selected to include a Goal Plan in your configuration using the Setup Wizard, all of your employees will have access to the Goal Plan you created. If you need to make changes to the configuration of the Goal Plan, go to the Goal Management section of Admin Tools. Click the links to take these actions:

1. **E-mail Notification Templates Settings**: Enable or disable system-generated emails, and edit the content of the email templates.
2. **Import/Export Goal Library**: Import or export a goal library CSV file.
3. **Manage Templates**: Create and modify templates for Goal Plans and review forms.
4. **Transfer Goal Between Users**: Transfer existing goals between employees.

Manage Templates: Create and Edit Goal Plan Templates
Use **Manage Templates** to create Goal Plan templates:
1. Click the **Goal Plan** tab.
2. Click **+ Add A New Template** to create a new Goal Plan template. **NOTE**: Once a template is created, it cannot be deleted.
3. Select a template from the SuccessStore and click **Add to my Instance**.
4. Enter the template name and click **Save**. **NOTE**: It is a best practice to name the template for each year or cycle you are running.

To edit an existing Goal Plan template:
1. Click the **Template Name** link to open the Goal Plan template.
2. Click **Save As** to copy the Goal Plan template to use as a basis for next year’s Goal Plan template.
3. Click a tab (e.g., Edit Categories) on the left side of the screen to change label names and descriptions.
4. Click **+** to add new categories or fields to the template.
5. Click, drag, and drop a category or field name to reorder sections and fields.
6. When done, click **Save**.

Import/Export Goal Library
Use **Import/Export Goal Library** to add a goal library to the system by downloading a CSV file template, entering goal information into the template, and then importing the file back into the system.
1. Use the **Available List of Templates** drop-down menu to select a goal library template, in CSV file format, to use.
2. Click **Download** to save the file to your computer.
3. Enter goal information into the CSV file template.
4. Click **Import** to load the updated goal library template into the system.

Transfer Goal Between Users
Use **Transfer Goal Between Users** to move an existing goal from one employee’s Goal Plan to another employee’s Goal Plan.
1. Enter the name of the employee who has the goal to be transferred.
2. Enter the name of the employee who will receive the transferred goal.
3. Click **Find Goals**.
4. Click check box(es) to select goal(s) and click **Transfer**.
Admin Tools: Performance Management

Performance Management
If you need to make changes to the performance review form, go to the Performance Management section of Admin Tools. Click the links to take these actions:

1. **Delete Form**: Delete a launched form.
2. **Launch Forms**: Create performance review forms for selected individuals or groups of users when it is time to start the performance review process.
3. **Manage Competencies**: Add, remove, or edit competencies and related content such as the Writing Assistant and Coaching Advisor.
4. **Manage Routemaps**: Modify the form routemap (workflow), which moves the form through the review process.
5. **Manage Templates**: Update instructions, field labels, and other details on the form.

Launch Forms
Use Launch Forms to create performance review forms for selected individuals or groups of employees.
1. Select the Type of form (e.g., PM) from the drop-down menu.
2. Select the Form Template from the drop-down menu.
3. Click Preview the template to view the form template prior to launching.
4. If needed, click Cancel launch and modify template to make changes to the template prior to launching the form.
5. Click Next when ready to continue.
6. Select to launch the form on a specific date or on a recurring schedule. Click Next.
7. Select or enter the review period dates. Click Next.
8. Select the group(s) or individual(s) who will receive the form. Click Next.
9. Confirm all of your selections before launching the form. Click the Change links to modify selections, if needed.
10. Click Launch to create the forms. The forms will be sent to the Inboxes of the first people listed in the routemap process.

Delete Form
Use this page to remove a performance review form from an employee’s document folder. There are two ways to find the form to be deleted:
1. Search the employee’s document folders:
   a. Enter the Employee Name.
   b. Use the Look In drop-down menu to select the folder to be searched.
   c. Click Search.
2. Search for the form by its Form ID number:
   a. Enter the Form ID. The Form ID is found by clicking the form’s information icon in the Performance section of the system.
   b. Click Search.
3. Select the form by clicking its check box.
4. Click Delete.
**Admin Tools: Performance Management**

**Change Form Date**
Use **Change Form Date** to change a performance review form's start, end, or due date. There are two ways to find the form:
1. Search the employee's document folders:
   a. Enter the **Employee Name**.
   b. Use the **Look In** drop-down menu to select the folder to be searched (i.e., **Inbox**, **En Route**, or **Completed**).
   c. Click **Search**.
2. Search for the form by its Form ID number:
   a. Enter the **Form ID**. The Form ID is found by clicking the form's information icon in the Performance section of the system.
   b. Click **Search**.
3. Select the form by clicking its check box.
4. Click **Change Date**.
5. Select to change the start, end, or due date by a specific number of days, weeks, or months, or enter a specific date.
6. Click **Save**.

**Manage Routemaps**
Use **Manage Routemaps** to create and edit workflow steps for performance review forms.
1. To create a new routemap, click **Add New Route Map** and select to build your own routemap or choose a pre-configured routemap from the SuccessStore.
2. Once a routemap is entered in the system, click the routemap name link to view and edit.
3. To remove a step, hover mouse over the step name and click the **Trash** icon that appears.
4. Click, drag, and drop a section name to reorder the steps in the workflow.
5. Click the **Name** of a step to edit its details, including step name and description, step type and roles, and define start, exit, and due dates to move forms along the process, to stay on track and update users' To-Do lists on their Home pages.
6. Click **Save**.

**Manage Templates**
Use **Manage Templates** to set up and manage performance review form templates.
1. Click the **Performance Review** tab.
2. Click **Add A New Template** to create a new form template.
3. Select a template from the SuccessStore and click **Add to my Instance**.
4. Enter the template name and click **Save**.

To edit an existing template:
1. Click the **Template Name** link to open the form template.
2. Click **Save As** to copy the template to use as a basis for the next review cycle.
3. Click **General Settings** on the left side of the screen to change the form name, description, routemap, and rating scale.
4. Click a section (e.g., **Core Values**) under **Edit Fields and Sections** to change the section name and description, and select fields and features to include in the section.
5. Click **Add New Section** to add new sections to the performance review form template.
6. Click, drag, and drop a section name to reorder sections on the form template.
7. **When done, click Save.** **NOTE:** When you make changes to a form template, some changes take effect immediately, and are reflected on both existing and new forms. Other changes only affect new forms created after the change was submitted.

**Restore Deleted Forms**
Use **Restore Deleted Forms** to restore a deleted performance review form. There are two ways to find the form to be deleted:
1. Search the employee's account for deleted forms:
   a. Enter the **Employee Name**.
   b. Click **Search**.
2. Search for the form by its Form ID number:
   a. Enter the **Form ID**, if known.
   b. Click **Search**.
3. Select the form by clicking its check box.
4. Click **Restore**.

**Additional administration tools to support performance management processes:**

- **Company Dictionary**
  Update words in the company dictionary.

- **Email Notification Template Settings**
  Edit email notification templates for system users.

- **Form Creation Permission**
  Grant or revoke permission to users to create forms.

- **Launch Forms**
  Launch performance review forms at the start of the performance review process.

- **Legal Scan Library Import**
  Import your own custom Legal Scan library into the system.

- **Manage Competencies**
  Set up and maintain your competency libraries.

- **Manage Routemaps**
  Create and edit workflow definitions for the performance review process.

- **Manage Scheduled Reviews**
  View and manage mass performance review form creation schedules.

- **Manage Templates**
  Create and edit performance review form templates.

- **Modify Form Routemap**
  Create performance review form templates and edit existing templates.

- **Rating Scales**
  Create and edit rating scales used in the performance review form.
Admin Tools: 360° Reviews

360° Reviews
If you need to make changes to the 360° review form, go to the 360° Reviews section of Admin Tools. Click the links to take these actions:

1. **Launch 360° Reviews**: Create 360° review forms for selected individuals or groups of users when it is time to start the 360° review process.
2. **Manage Routemaps**: Modify the form routemap (workflow), which moves the form through the review process.
3. **Manage Templates**: Update the instructions, field labels, and other details on the 360° form.
4. **Rating Scales**: Manage rating scale values and descriptions.

**Complete/Decline 360° Form**
Use Complete/Decline 360° Form to complete or decline a 360° form for a user.
1. Use the drop-down menu to select the folder that the 360° form is in.
2. Enter the username of the employee who has the form.
3. Click Find Document.
4. Click a check box to select the 360° form that requires action.
5. Click Complete Document to send the 360° form to the user's Completed folder.
6. Or, click Decline Document to send the 360° form back to the manager as declined.

**Change 360° Process Owner**
Use this page to change the process owner of a 360° form.
1. Enter the Document ID. The ID number is found by clicking the form’s information icon in the Performance section of the system.
2. Enter the recipient’s Username.
3. Click Change Process Owner.

**Change Participant Category**
Use this page to change participants’ categories listed on a completed 360° form.
1. Enter the Document ID. The ID number is found by clicking the form’s information icon in the Performance section of the system.
2. Click Find Document.
3. Use the Change Categories drop-down menu to change a feedback provider’s relationship to the employee being reviewed.
4. When done, click Change Categories.

**Restore Completed 360°**
Use Restore Completed 360° to restore a completed 360° form for a participant, so the individual can make changes to the form.
1. Enter the Document ID. The ID number is found by clicking the form’s information icon in the Performance section of the system.
2. Select to restore the document to the Process Owner or Participant (the Process Owner will also receive the 360° form to manage the process).
3. If Participant is selected, enter the Username of the participant who is to receive the 360° form.

**QUICK TIP**: Many of the 360° Review admin features are shared with performance reviews; refer to the performance management quick reference guide for instructions on launching forms and managing templates.
Admin Tools: Compensation

**Company Processes & Cycles**

- Goal Management
- Performance Management
- 360 Reviews
- Talent
- Recruiting
- Employee Files

**Manage Employees**

- Reset User Account
- Reset User Passwords
- Manage Forms by User
- Send User Welcome Email

**Compensation**

To make changes to the Compensation Plan, go to the Compensation section of Admin Tools.

1. **Compensation Management Permission**: Grant or revoke permission to participate in the compensation planning process.
2. **Launch Compensation Forms**: Use to launch Compensation Plans.
3. **Manage Compensation Plan Template**: Use to update the instructions, field labels, and other details on the Compensation Plan (e.g., Add a year to the title for planning).
4. **Manage Routemaps**: Modify the form routemap (workflow), which moves the form through the review process.

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**Add, Delete, and Move Members**

Use Add, Delete, and Move Members to change members on existing Compensation Plans.

1. Select the Compensation Template from the drop-down menu.
2. Enter the Planner Name in the Compensation form drop-down menu.
3. To add an employee, enter the user information and click Add.
4. To remove an employee, click box to select an employee and click Delete.
5. To move member(s) from one form to another, enter the Planner Name in the Source Form drop-down menu, enter the Planner Name in the Target Form drop-down menu, check boxes to select members, and click Move.
6. Click check box to send an email notification to the current reviewer of the affected Compensation Plan.

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**Compensation Permissions**

- **Compensation Executive Review Permission**: Grant and revoke Executive Review privilege of system users. Users with Executive Review privilege will be able to perform various Executive Review functions.
- **Compensation Management Permission**: Grant and revoke Compensation Management privilege of system users. Users with Compensation Management privilege will be able to perform various Compensation Management functions.

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**Launch Compensation Forms**

Use Launch Compensation Forms to launch Compensation Plans at the start of a review period.

1. Use the drop-down menu to select the Plan Template.
2. Enter the Worksheet Name. This will appear at the top of every worksheet along with the planner’s name.
3. Enter the Start and End Dates to define the entire compensation planning cycle time frame.
4. Enter the Due Date to define when worksheet recommendations must be completed and approved.
5. Enter the Head of Compensation Planning. This is the topmost compensation decision maker in your worksheet approval flow (typically the CEO). Worksheets will be created for every compensation planner in that person’s hierarchy.
6. Click check box if you wish to create one form containing the direct reports of the person entered as the Head of Planning, rather than forms for all employees from the Head of Planning down through the organization.
7. Click check box to send email notification to planner(s) when the Compensation Plan is created. You can select this option only if the Document Creation Notification (in the E-Mail Notification Templates area of Admin Tools) has been enabled.
8. Click Launch Plan.