

## SuccessFactors Tips

### Featured Tip : Using the **Toolbar Buttons**

When you open a form, you will see a toolbar at the top of the page with action buttons to help you work within the form. The buttons are graphic icons that help you understand their purpose. You can also place your cursor over each icon to get a brief description of the button's function.

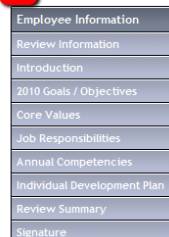
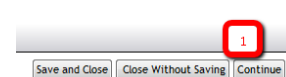


### How To: **Toolbar Buttons**

The following toolbar buttons are commonly found on SuccessFactors forms. You may not have all listed action buttons in every form or view.

**View Option Buttons** – Allows you to change how you view the form on your page.








- **View Full Form** – Displays the form with all sections in view. You will use your scroll bar to complete the form.
- **View Form By Section** – Displays the form by section. (1) You can use the Continue button to progress to the next section or (2) click any of the form sections on the left hand navigation.
- **View Form by Item** – Displays the sections of the form in a condensed view. You can use the Continue button to progress to the next section or click any of the form sections on the left hand navigation. (3) You must click individual links in the form to complete the section.



### Other Buttons

- **Spell Check the entire form** – Allows you to check the spelling in all comment fields in the form.
- **Legal Scan the entire form** – Allows you to check the text in all comment fields in the form for potentially inappropriate words or phrases.



<ul style="list-style-type: none"> <li>• <b>Print Preview</b> – Shows you what a print copy of the form will look like. Note: Opens in a new window.</li> </ul>	
<ul style="list-style-type: none"> <li>• <b>Print to HTML or PDF</b> – Allows you to configure the print setup of the form. You can choose the format of HTML or PDF. You can choose which sections to print as well as section details. The show form button shows you the configured printable form. Note: Opens in a new window.</li> </ul>	
<ul style="list-style-type: none"> <li>• <b>Save entire form</b> – Allows you to save while you are working in the form at any time.</li> </ul>	
<ul style="list-style-type: none"> <li>• <b>Performance form history</b> – (Also called SuccessFactors Business Execution Suite Reviews) <b>From Employee Self Review:</b> Allows you to access past performance reviews without leaving the form. You have several options to select from including date period, in-progress documents and a document list. <b>From Supervisor Review:</b> Allows you to access past performance reviews for the employee that you are currently reviewing. You also have the same options as above. Note: Opens in a new window.</li> </ul>	
<ul style="list-style-type: none"> <li>• <b>360 form history</b> – (Also called SuccessFactors Business Execution Suite 360's) Allows you to view past 360 reviews. You have several options to select from including date period, in-progress documents and a document list. Note: Opens in a new window.</li> </ul>	
<ul style="list-style-type: none"> <li>• <b>Notes History</b> – Allows you to view any recorded notes. You can also add, edit and delete any notes from the window. Note: Opens as a pop-up window.</li> </ul>	
<ul style="list-style-type: none"> <li>• <b>Info about this form</b> - Shows details about the form including properties, approval chain such as routing map and audit trail.</li> </ul>	

### Additional Toolbar Buttons Tip

The Toolbar buttons can provide an easy way for you to access important performance information without leaving a form!

If you need additional assistance, please contact the **SuccessFactors System Administrator** for your entity.