

SuccessFactors Tips

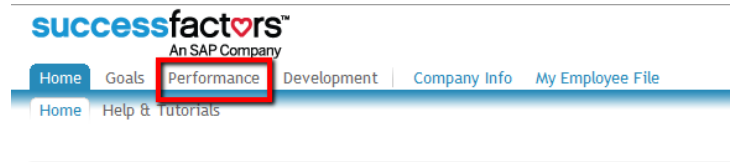
Featured Tip : Organizing your **Completed Forms**

By default all completed forms go the **Un-Filed** link under the **Completed** menu on the My Forms page. As years progress and your employees complete their Performance Reviews and, perhaps 360 Reviews, this folder can become full and difficult to manage. SuccessFactors allows you to create folders to organize the completed forms.

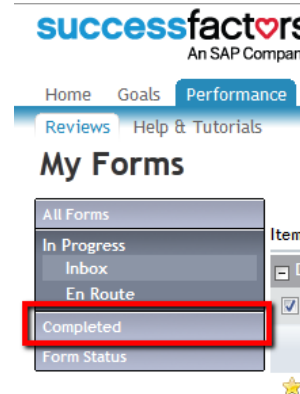


How To: Organize Completed Folders

- Log into SuccessFactors.
- Click the **Performance** tab.



- Under the **My Forms** section, click the **Completed** link.



successfactors™
An SAP Company

Welcome, SHANNON MARTIN (sfmartin) [Options](#) [Logout](#)

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Reviews Help & Tutorials

My Forms

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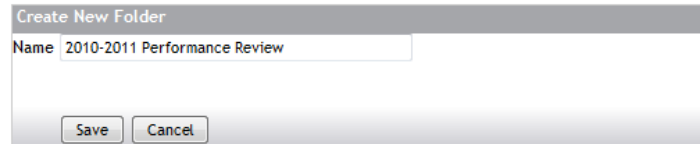
Create New Folder Move to Folder: Select Folder Move

Completed
Create New Folder
Un-Filed
Shannon Martin
Form Status

<input type="checkbox"/>	Form Title	Employee	Form Start Date	Form End Date	Form Due Date	Completed On	Action
<input type="checkbox"/>	★ 2010-2011 Hospital Staff Performance Review for ALISON P ABDILLA	ALISON P ABDILLA	01/01/2010	09/30/2011	11/30/2011	10/20/2011	i
<input type="checkbox"/>	★ 2010-2011 Hospital 360 Clinical Review for ALISON P ABDILLA	ALISON P ABDILLA	08/02/2011	09/01/2011	09/01/2011	12/23/2011	i
<input type="checkbox"/>	★ 2011-2012 Hospital Staff Performance Review for ALISON P ABDILLA	ALISON P ABDILLA	08/27/2012	09/10/2012	11/30/2012	10/25/2012	i
<input type="checkbox"/>	★ 2010-2011 Hospital Staff Performance Review for PAT E BAUGH	PAT E BAUGH	01/01/2010	09/30/2011	11/30/2011	11/10/2011	i
<input type="checkbox"/>	★ 2010-2011 Hospital 360 Clinical Review for PAT E BAUGH	PAT E BAUGH	08/02/2011	09/01/2011	09/01/2011	08/30/2011	i

- Under the **Completed** link you will see that by default all completed forms go to the Un-Filed folder.
- You can create folders to organize your completed forms by clicking the **Create New Folder** link or the **Create New Folder** button.

- You will be prompted to **Create New Folder**. In the **Name** field type in the name of the folder you would like to create, then click the **Save** button.



Create New Folder

Name: 2010-2011 Performance Review

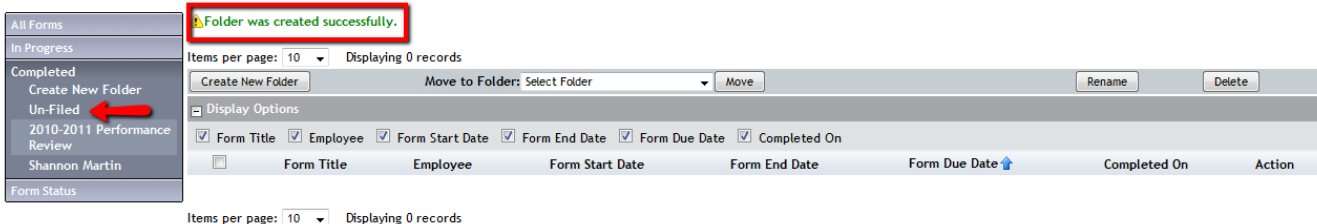
Save Cancel

Example: While you have flexibility in the way you organize your folders, one recommended naming convention would be to create folders using the Year(s) and Form type.

- 2010-2011 Performance Review
- 2010-2011 360 Clinical
- 2010-2011 360 Management
- 2011-2012 Performance Review

You may also want to create a Folder with your name to organize your own forms.

My Forms



Folder was created successfully.

Items per page: 10 Displaying 0 records

Create New Folder Move to Folder: Select Folder Move Rename Delete

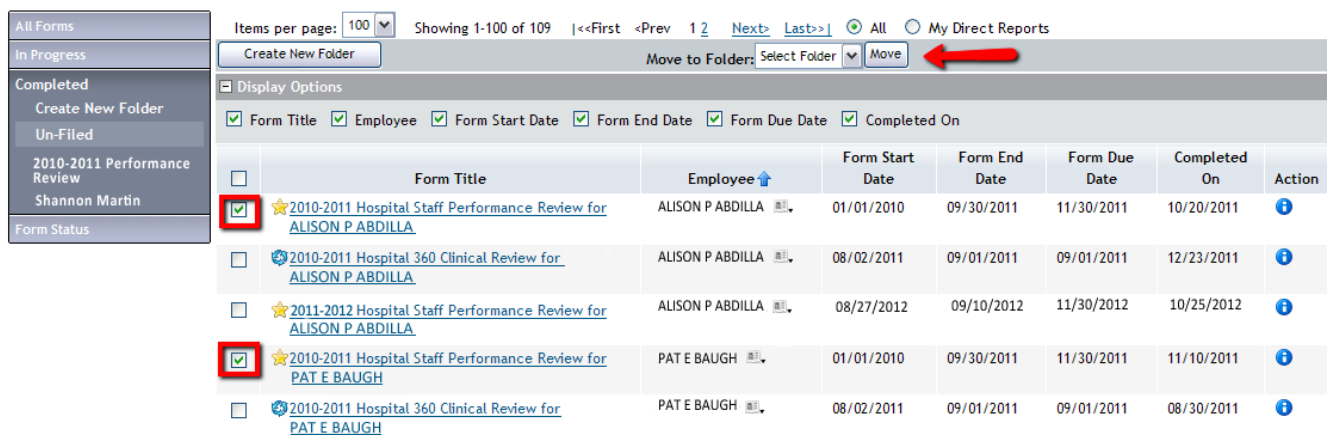
Display Options

☒ Form Title ☒ Employee ☒ Form Start Date ☒ Form End Date ☒ Form Due Date ☒ Completed On

Form Title	Employee	Form Start Date	Form End Date	Form Due Date	Completed On	Action
Items per page: 10 Displaying 0 records						

- Note that the Folder was created successfully, but that you do not have any forms in the folder yet. You must go back to the **Un-Filed** link to select the forms you would like to go into that folder.
- Click the **Un-filed** link.

My Forms



Items per page: 100 Showing 1-100 of 109 | <<First <Prev 1 2 Next> Last>> | All My Direct Reports

Create New Folder Move to Folder: Select Folder Move

Display Options

☒ Form Title ☒ Employee ☒ Form Start Date ☒ Form End Date ☒ Form Due Date ☒ Completed On

	Form Title	Employee	Form Start Date	Form End Date	Form Due Date	Completed On	Action
<input checked="" type="checkbox"/>	2010-2011 Hospital Staff Performance Review for ALISON P ABDILLA	ALISON P ABDILLA	01/01/2010	09/30/2011	11/30/2011	10/20/2011	i
<input type="checkbox"/>	2010-2011 Hospital 360 Clinical Review for ALISON P ABDILLA	ALISON P ABDILLA	08/02/2011	09/01/2011	09/01/2011	12/23/2011	i
<input type="checkbox"/>	2011-2012 Hospital Staff Performance Review for ALISON P ABDILLA	ALISON P ABDILLA	08/27/2012	09/10/2012	11/30/2012	10/25/2012	i
<input checked="" type="checkbox"/>	2010-2011 Hospital Staff Performance Review for PAT E BAUGH	PAT E BAUGH	01/01/2010	09/30/2011	11/30/2011	11/10/2011	i
<input type="checkbox"/>	2010-2011 Hospital 360 Clinical Review for PAT E BAUGH	PAT E BAUGH	08/02/2011	09/01/2011	09/01/2011	08/30/2011	i

- Select the forms that you would like to organize by clicking in the box next to the form. This will put a check mark in the box. After you have selected all of the forms that you would like to go into a folder, use the drop down from the **Move to Folder** selection to select the correct form. Then click the **Move** button.
- You will be notified that the Folder record(s) were successfully moved.

My Forms

Items per page: 10 Showing 1-1 of 1

Create New Folder Move to Folder: Select Folder Move

Display Options

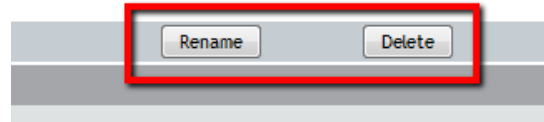
☒ Form Title ☒ Employee ☒ Form Start Date ☒ Form End Date ☒ Form Due Date ☒ Completed On

	Form Title	Employee	Form Start Date	Form End Date	Form Due Date	Completed On
<input type="checkbox"/>	★ 2010-2011 Hospital Staff Performance Review for ALISON P ABDILLA	ALISON P ABDILLA	01/01/2010	09/30/2011	11/30/2011	10/20/2011
<input type="checkbox"/>	★ 2010-2011 Hospital Staff Performance Review for PAT E BAUGH	PAT E BAUGH	01/01/2010	09/30/2011	11/30/2011	11/10/2011

- The forms have now been organized into your folder for easy access.
- Repeat the above process to organize other forms. You may choose to do this yearly as forms are completed.

- You can modify any folder that you create.
- To do this, highlight the folder and select the **Rename** or **Delete** button to the right of your screen.

Note: To delete a folder you must remove (reorganize) all forms that were moved to that folder.



Additional Organize Completed Folders Tips

- You can easily navigate through your organized folders by clicking the name of the folder you want to open from under the **Completed** link of My Forms.
- You can create as many folders as you need.
- Each folder can store up to 999 forms.
- The Un-Filed folder is a permanent folder. You cannot rename or delete it.

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