

Sentrifugo

Performance Appraisal Guide

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Introduction to Performance Appraisal

Performance Appraisal is a systematic evaluation of performance of the employees and to understand the abilities of a person for further career transition. It is generally done by the supervisors based on measuring criterion such as parameters, questions, ratings and more.

In Sentrifugo, the appraisal is configured for an entire business unit or for a specific department in a business unit. Factors such as parameters, questions, skills and ratings can be configured by the user. On the basis of these factors the Appraisal process can be initialized.

Parameters

Parameters define the performance indicators defined by the supervisors to assess the capabilities of the employees.

- Go to **Appraisals** in the top menu
- Select the option **Configuration** in the submenu on the left side panel
- Select the option **Parameters** in the child menu
- Add parameters by clicking on the **+ Add** button

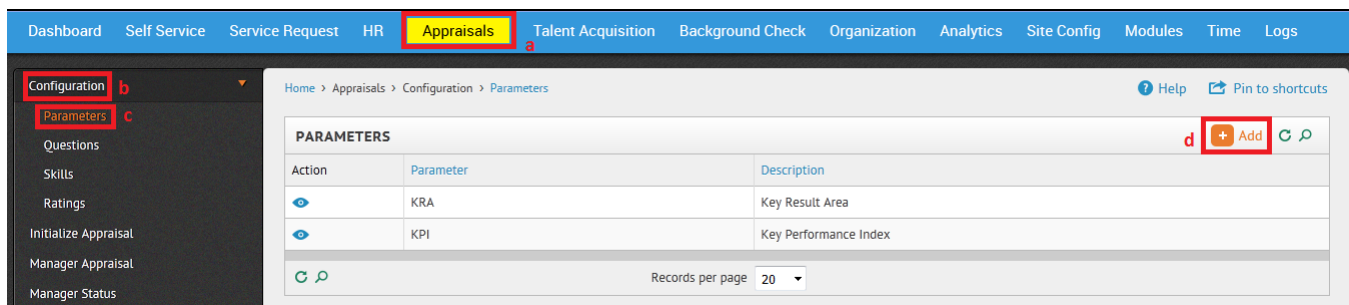


Figure 1

In the Add Parameters screen,

- Enter the parameter
- Provide description if necessary
- Click on **SAVE** to add the parameter

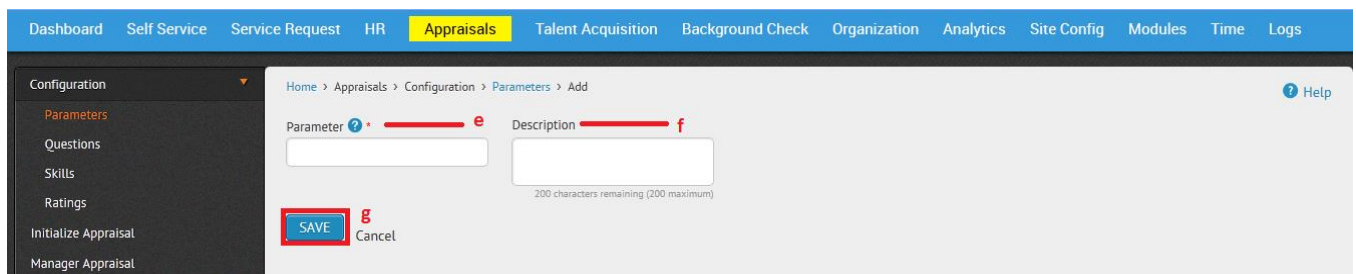


Figure 1.1

Questions

Questions are determined for each parameter defined in the parameters section. For each parameter, the supervisor can provide more than one question in relation with the parameter.

- Go to **Appraisals** in the top menu
- Select the option **Configuration** in the submenu on the left side panel
- Select the option **Questions** in the child menu
- Add questions by clicking on the **+ Add** button

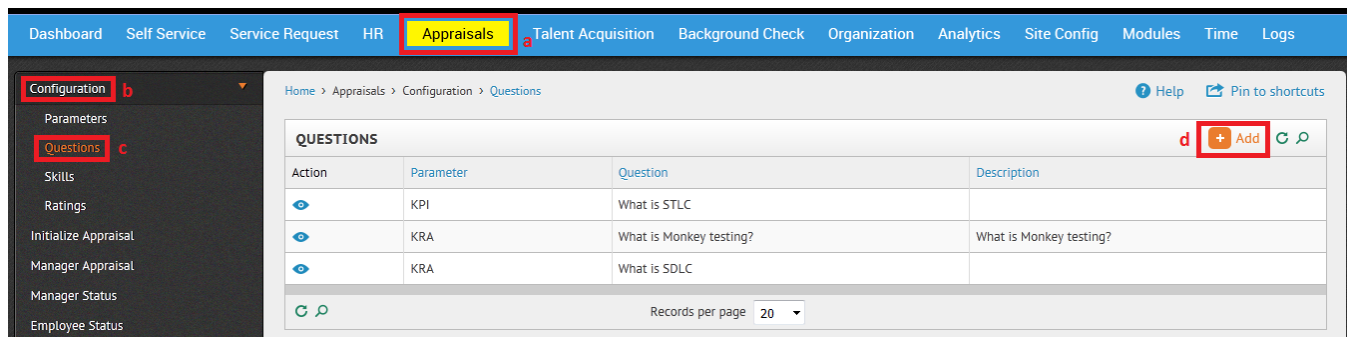


Figure 2

In the Add Questions screen,

- Select an option from the parameters dropdown
- Add other parameter by clicking on **Add Parameter**
- Enter the question
- Provide description if necessary
- Click on **ADD NEW QUESTION** to add questions for the selected parameter
- Click on **SAVE** add questions for the selected parameter

Refer Figure 2.1

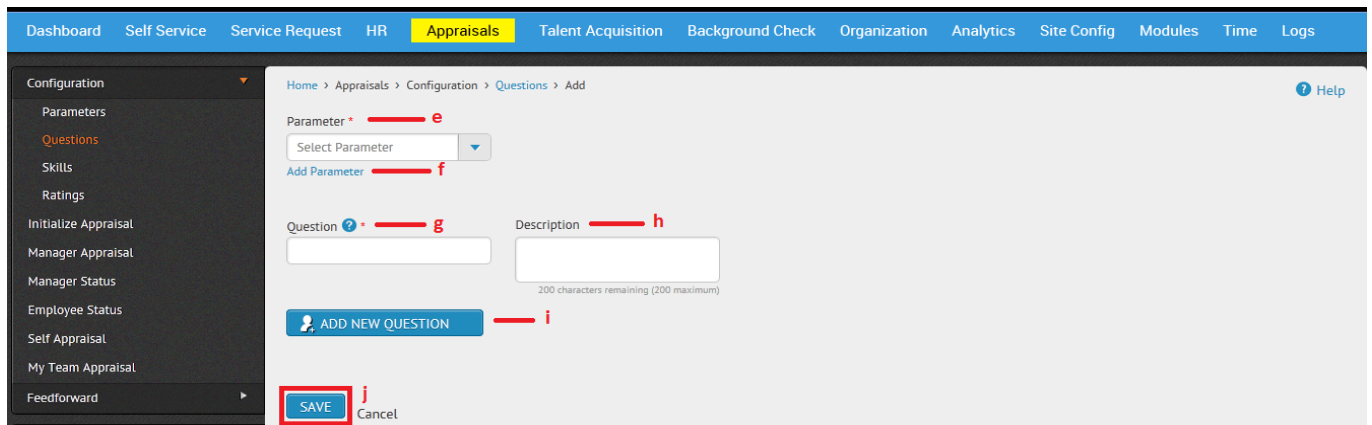


Figure 2.1

Skills

Skills are the skill set that enhances the employee's profile.

- Go to **Appraisals** in the top menu
- Select the option **Configuration** in the submenu on the left side panel
- Select the option **Skills** in the child menu
- Add skills by clicking on the **+ Add** button

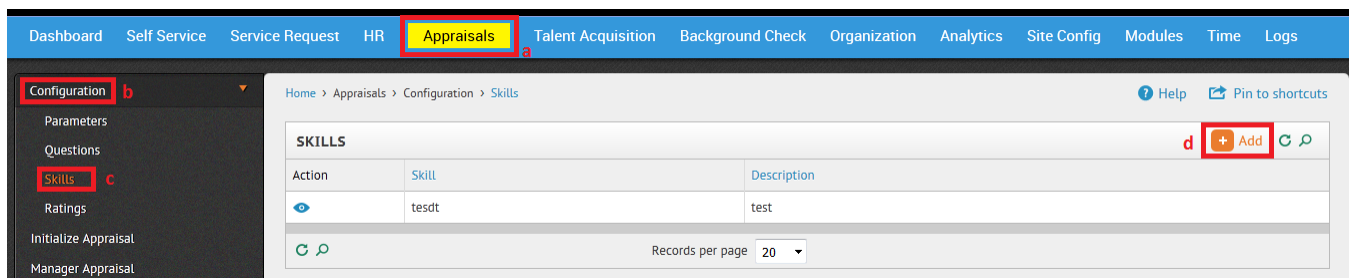


Figure 3

In the Add Skills screen,

- Enter the skill
- Provide description if necessary
- Click on Save to add the skill

Refer Figure 3.1

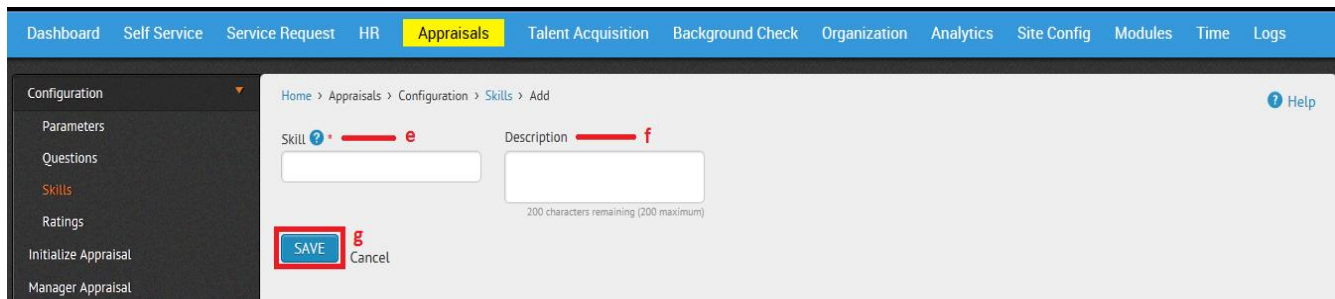


Figure 3.1

Ratings

Ratings are defined for each business unit or department for which the appraisal settings are previously configured. The rating scale 1-5 and 1-10, is decided as per the standards of the organization for appraisal process.

- Go to **Appraisals** in the top menu
- Select the option **Configuration** in the submenu on the left side panel
- Select the option **Ratings** in the child menu
- Add ratings by clicking on the **+ Add** button

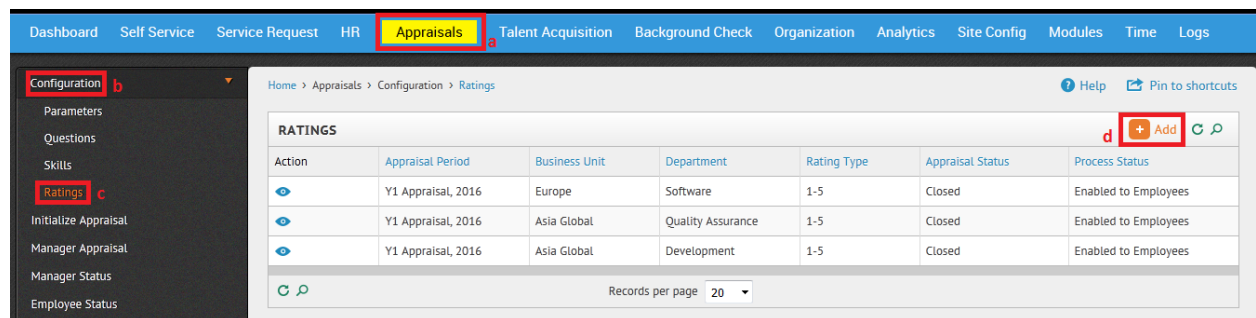


Figure 4

- Select an option from Business Unit dropdown
- Select an option from Department dropdown
- The Appraisal Ratings range selected in Appraisal Settings for the selected Business Unit and Department are auto populated
- Provide rating text for each rating value
- Click on Save to add the ratings

Refer Figure 4.1

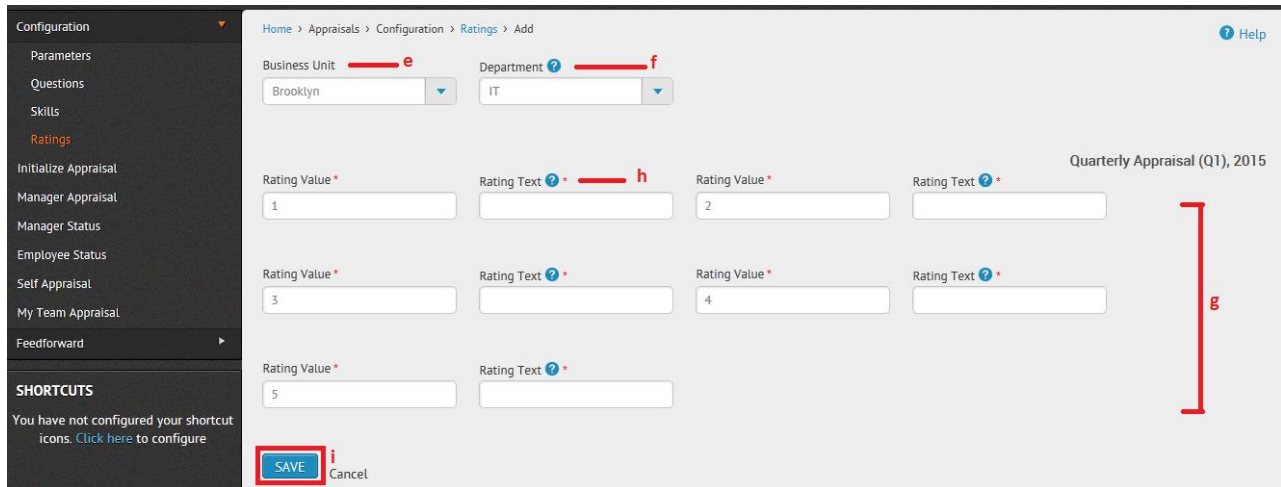


Figure 4.1

Upon configuring the essential details, the initialization of appraisal process is the next step.

Initialize Appraisal

In the initialization step, the business units or the departments that have their appraisal settings configured will be displayed.

- Business unit: All the Business Units which have the Appraisal Settings configured will be displayed
- Frequency: Based on the appraisal settings for the selected business unit, frequency will be auto populated
- Period: Period will be calculated dynamically based on the previously configured appraisal for the selected business unit
- Appraisal Status: Appraisal status will be "Open" by default. Upon the initialization of appraisal, close and force close options will be made available
 - Force Close: Closes the Appraisal Process by force. Appraisal Process for the selected Business Unit can be configured again and for the same appraisal period
 - Close: Closes the appraisal process for the selected business unit permanently
- Enable to: The Appraisal Process will be enabled by default to managers. When the settings are saved, the Appraisal Process will be made available for managers to configure the questions under the selected parameters. If the appraisal is directly made available for the employees, they will be able to view the questions configured by the HR.
- Due Date: The due date is for closing the appraisal process for managers or employees
- Consider Management: To consider management group for appraisal process for the selected period, check the respective checkbox

- Eligibility: Select the employees eligible for appraisal period based on the employee status
 - Parameters: Select the parameters for appraisal process that will be applicable to the employee.
 - Ratings : The ratings configured in appraisal setting for a business unit or department will be auto-populated
- a. Go to **Appraisals** in the top menu
 - b. Select the option **Initialize Appraisal** in the submenu on the left side panel
 - c. Click on the **+ Add** button

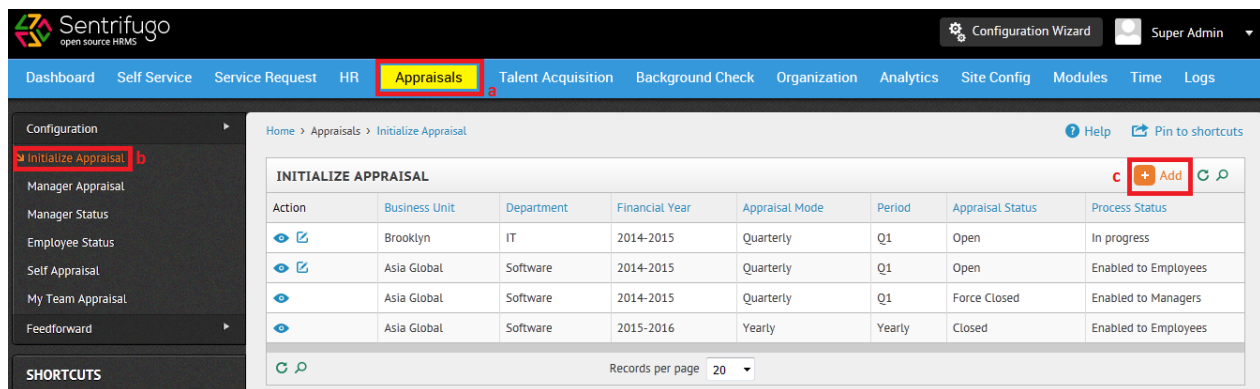
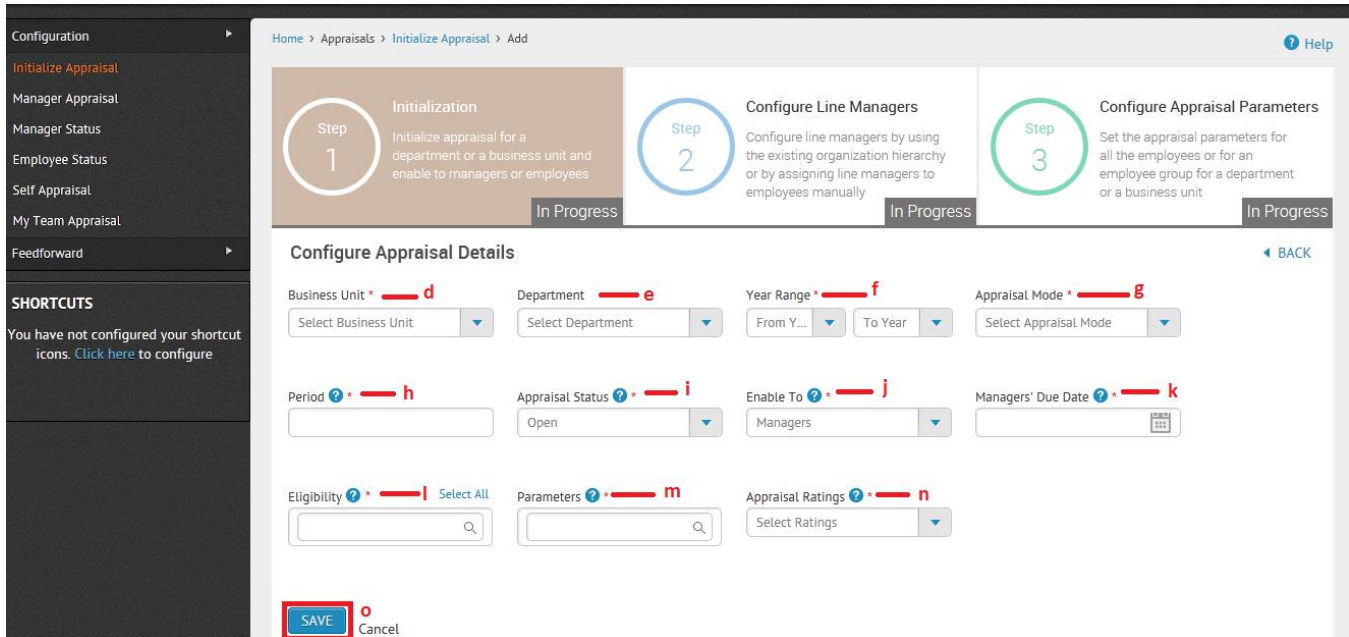


Figure 5

In the Add Initialize Appraisal screen,

- d. All the business units for which the appraisal settings are configured are populated. Select an option from business unit dropdown
- e. Select an option from the department dropdown
- f. Based on the selected business unit and department, the appraisal mode is populated
- g. Select the year range
- h. Period will be dynamically calculated and populated
- i. Appraisal Status is by default Open in Initialize appraisal
- j. Select an option in Enable To dropdown
- k. Based on the Enable To option, set a due date to the employees or to managers
- l. Select more than one eligibility criteria for employees who are eligible for the appraisal process
- m. Select more than one parameters
- n. Ratings will be auto populated
- o. Click on Save to initialize appraisal for a business unit or a department

Refer Figure 5.1



Home > Appraisals > Initialize Appraisal > Add

Step 1 Initialization
Initialize appraisal for a department or a business unit and enable to managers or employees
In Progress

Step 2 Configure Line Managers
Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually
In Progress

Step 3 Configure Appraisal Parameters
Set the appraisal parameters for all the employees or for an employee group for a department or a business unit
In Progress

Configure Appraisal Details

Business Unit * **d**
Select Business Unit

Department **e**
Select Department

Year Range * **f**
From Y... To Year

Appraisal Mode * **g**
Select Appraisal Mode

Period **h**

Appraisal Status **i**
Open

Enable To **j**
Managers

Managers' Due Date **k**

Eligibility **l** Select All

Parameters **m**

Appraisal Ratings **n**
Select Ratings

o SAVE Cancel

Figure 5.1

Configure Line Managers

Once the appraisal process is initiated for a department or a business unit, the line managers must be configured so as to evaluate the employees' appraisal.

The Line Managers can be configured in the appraisal process in two ways:

1. Choose by Organization Hierarchy

- Establish appraisal process as per the organization hierarchy where line manager will be same as the reporting manager
- Define the number of appraisal levels and assign line managers to the employees
- Save the configuration to apply to the selected department or business unit

- Click on **Choose by Organization Hierarchy**
- Click **Yes** in the Confirmation alert box

Refer Figure 5.2

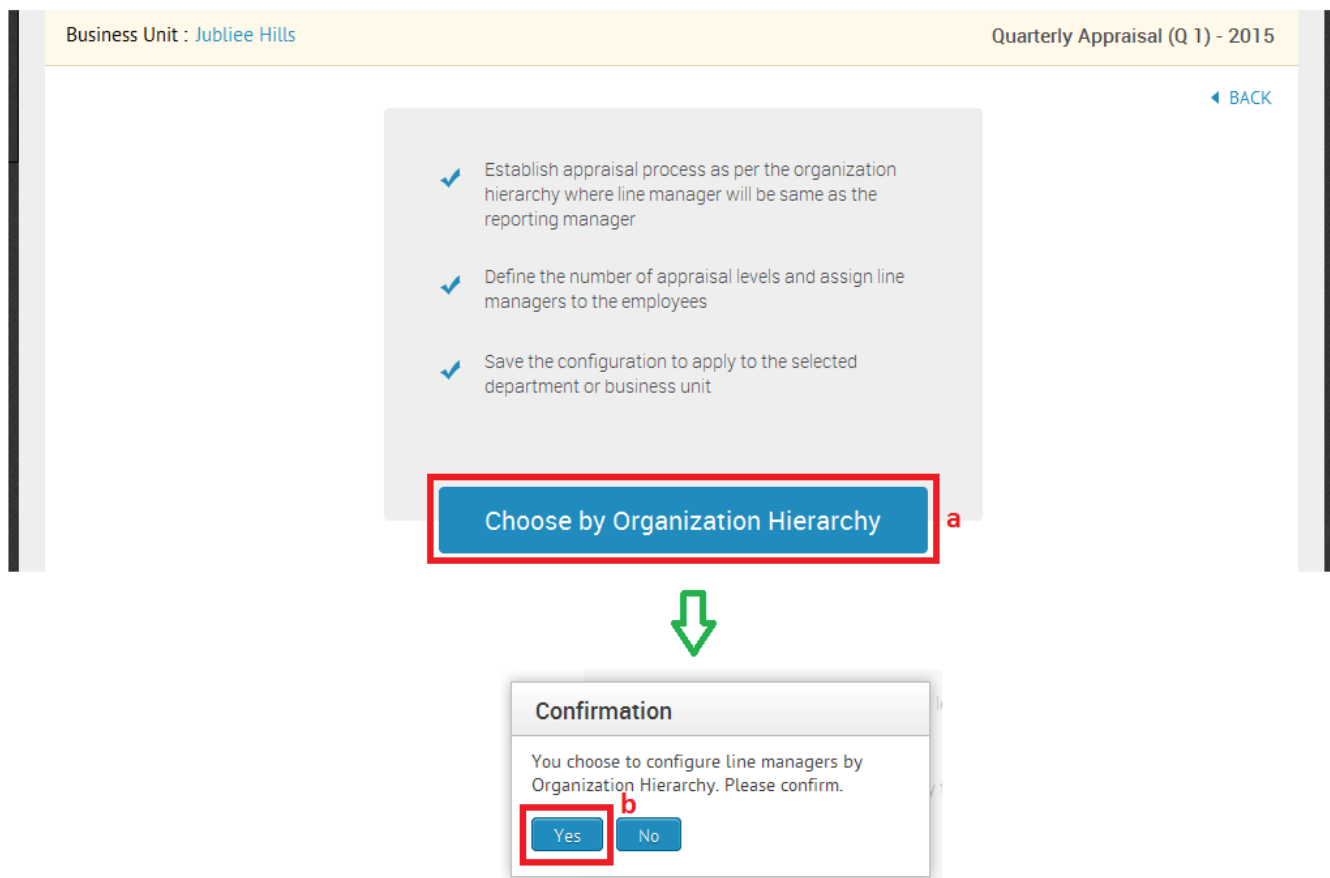
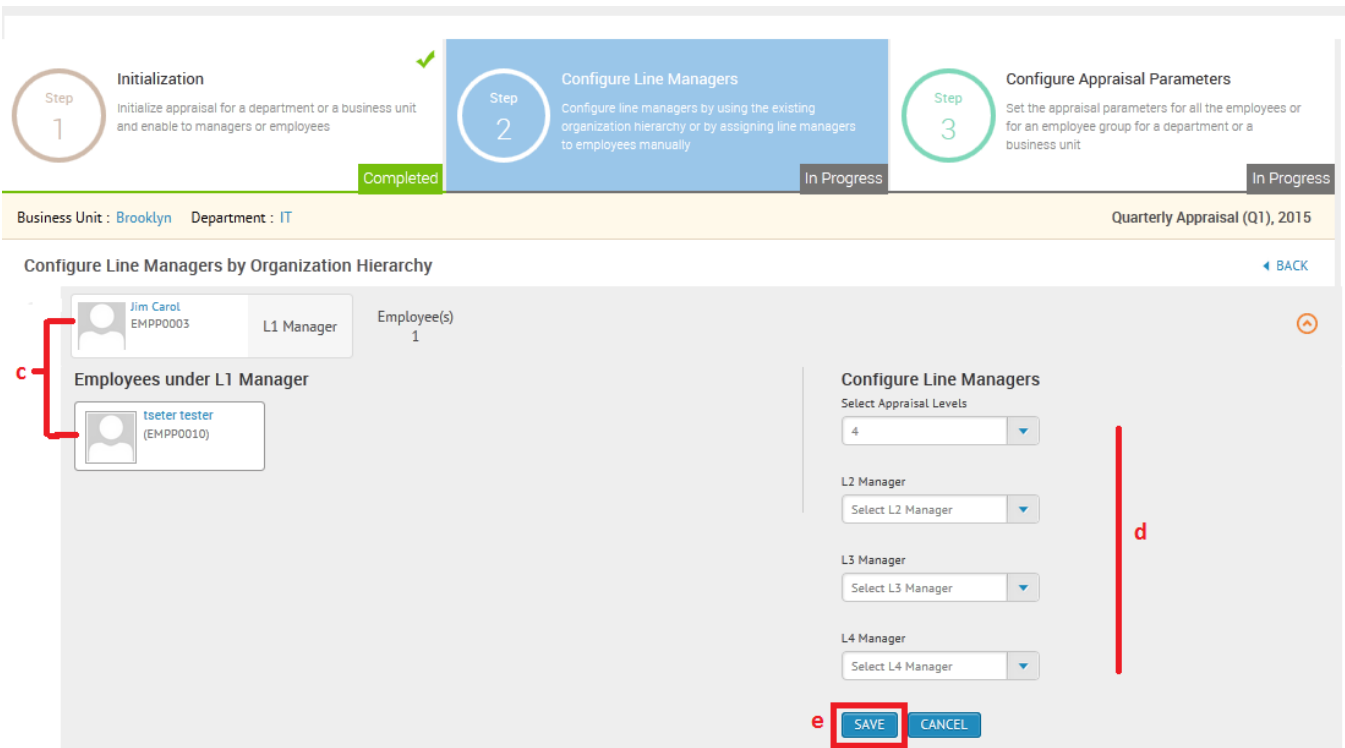


Figure 5.2

- c. Manager and the employees under the manager are displayed
- d. On the right side, configure line managers by selected the number of appraisal levels
- e. Click on [SAVE](#)

Refer Figure 5.3



Step 1 Initialization
Initialize appraisal for a department or a business unit and enable to managers or employees

Step 2 Configure Line Managers
Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually

Step 3 Configure Appraisal Parameters
Set the appraisal parameters for all the employees or for an employee group for a department or a business unit

Business Unit : Brooklyn Department : IT

Quarterly Appraisal (Q1), 2015

Configure Line Managers by Organization Hierarchy

Jim Carol (EMPP0003) L1 Manager Employee(s) 1

Employees under L1 Manager

tseter tester (EMPP0010)

Configure Line Managers

Select Appraisal Levels
4

L2 Manager
Select L2 Manager

L3 Manager
Select L3 Manager

L4 Manager
Select L4 Manager

SAVE CANCEL

Figure 5.3

2. Assign Line Managers to Employees

- Define the number of appraisal levels
- Determine the line managers as per the selected appraisal levels
- Add or remove employees based on the selected line managers

- Click on **Assign Line Managers to Employees**
- Click **Yes** in the Confirmation alert box

Refer Figure 5.4

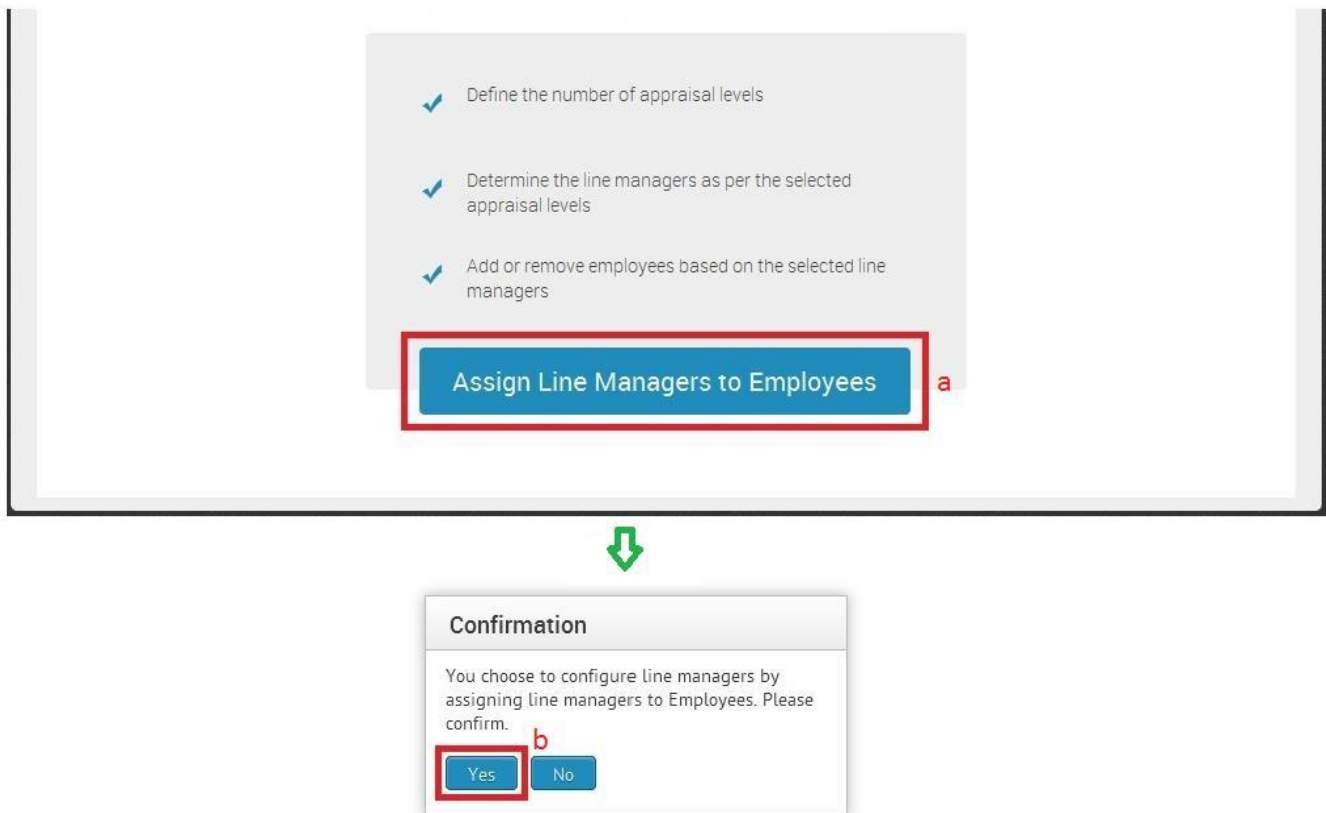


Figure 5.4

- c. Click on **+Add Line Managers**
- d. Select the number of appraisal levels
- e. Based on the number of appraisal levels, select the line managers
- f. Employees are displayed in the left side panel
- g. Click on the employee to select for appraisal process
- h. Click on **SAVE**

Refer Figure 5.5

Home > Appraisals > Initialize Appraisal > Edit Help

Step 1

Initialization

Initialize appraisal for a department or a business unit and enable to managers or employees

Completed

Step 2

Configure Line Managers

Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually

In Progress

Step 3

Configure Appraisal Parameters

Set the appraisal parameters for all the employees or for an employee group for a department or a business unit

In Progress

Business Unit : Brooklyn Department : IT Quarterly Appraisal (Q1), 2015

Configure Line Managers BACK

+Add Line Managers C

Select Appraisal Levels

2 d

L1 Manager L2 Manager

Michael John Jim Carol

e

Employees (Click on an employee to add to group)

Search Employee

sal kiran (EMPP0011) f

Employees (Click on an employee to remove)

Search Employee

tester tester EMPP0010 g

h

SAVE Cancel

Figure 5.5

Discard Line Manager Configuration

You can discard the line managers' configuration after saving the appraisal process in step two.

- Click on **Discard** to remove the line manager configurations

Refer Figure 5.6

Home > Performance Appraisal > Initialize Appraisal > Edit Help

Step 1

Initialization

Initialize appraisal for a department or a business unit and enable to managers or employees

Completed

Step 2

Configure Line Managers

Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually

Completed

Step 3

Configure Appraisal Parameters

Set the appraisal parameters for all the employees or for an employee group for a department or a business unit

In Progress

Business Unit : Sancta Clara Quarterly Appraisal (Q0), 2015

Configure Line Managers by Organization Hierarchy BACK

Reporting Manager	L1 Manager	Employees	Appraisal Levels	Edit	Discard
EMPP0002 Manager		1	1		a
EMPP0003 Manager		1			

OR

Business Unit : Sancta Clara Quarterly Appraisal (Q0), 2015

Configure Line Managers BACK

+Add Managers

Reporting Manager	L1 Manager	Appraisal Levels	Employees	Edit	Discard
EMPP0002 Manager		1	1		a

Figure 5.6

Configure Appraisal Parameters

Configure the appraisal parameters after configuring the line managers. Here, the appraisal process can be made applicable to employees. This step can be done in two ways:

1. All Employees

- Questions created for the selected parameters in initialization step will be displayed
- Choose or add questions to be enabled to all employees for the selected business unit or department
- Choose ratings and/or comments for each question by line manager and employee

a. Click on 'All Employees'

b. Click on 'Yes' in the Confirmation alert box

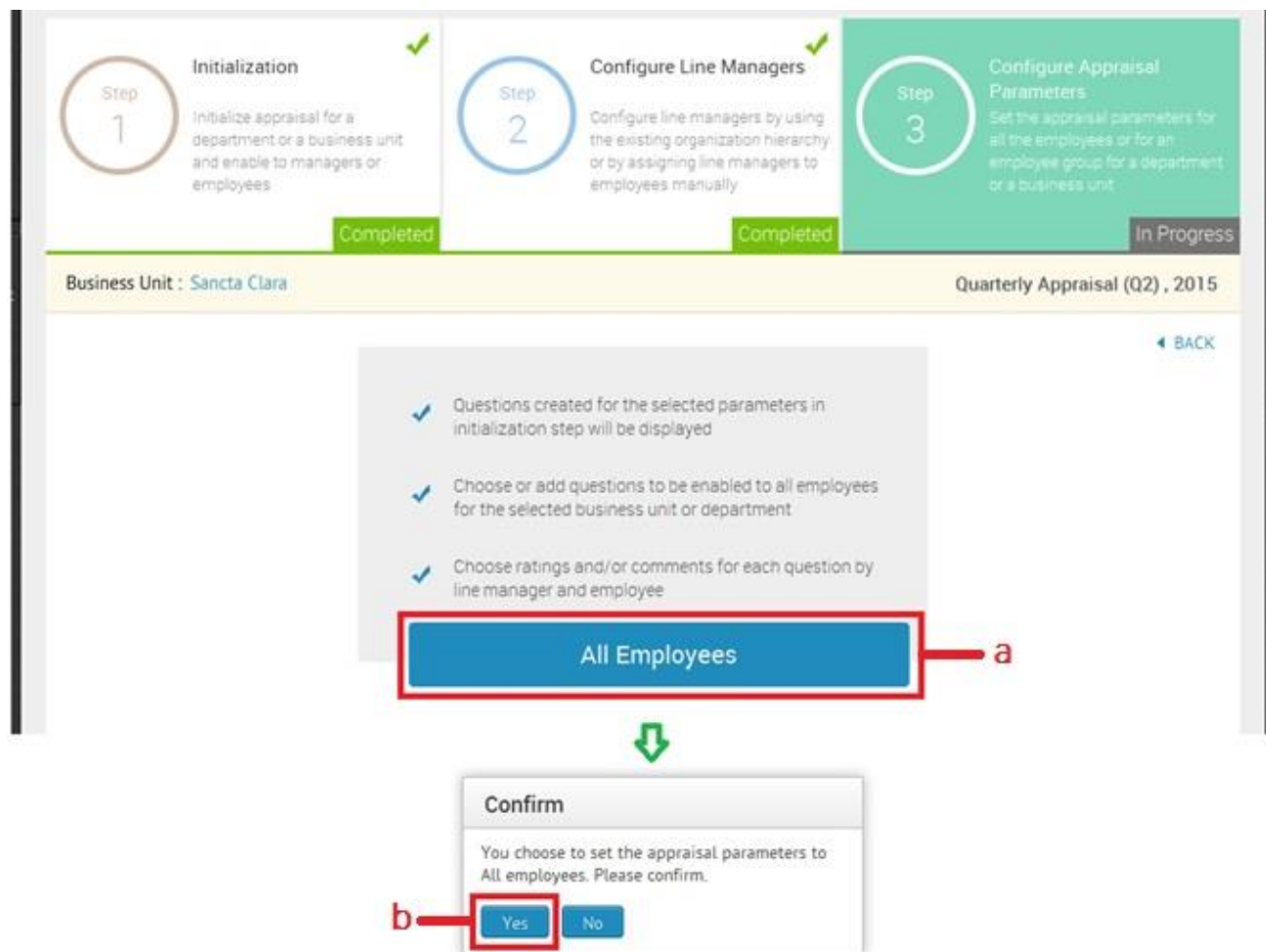


Figure 5.7

- c. Select Questions individually by checking the checkbox respective to each question

Or

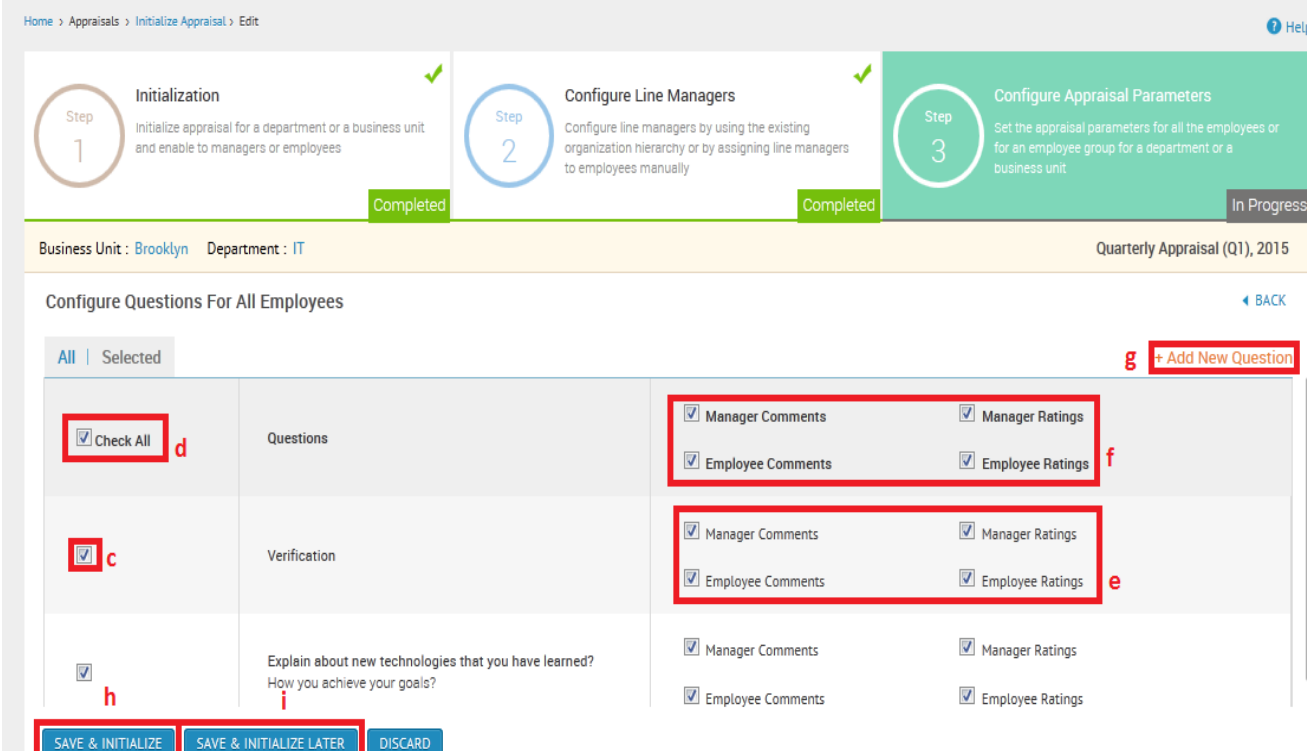
- d. Select all the questions by checking the Check All option in the table header
 e. Select ratings or comments of manager or employee individually for all the questions

Or

- f. Select ratings or comments of manager or employee by checking the Manager Rating, Manager Comments, Employee Ratings and Employee Comments
 g. Click on Add New Question to add more questions to the appraisal process
 h. Click on Save & Initialize to initialize the appraisal

Or

- i. Click on Save & Initialize Later to only save the appraisal process



Home > Appraisals > Initialize Appraisal > Edit

Help

Step 1 Initialization
Initialize appraisal for a department or a business unit and enable to managers or employees
Completed

Step 2 Configure Line Managers
Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually
Completed

Step 3 Configure Appraisal Parameters
Set the appraisal parameters for all the employees or for an employee group for a department or a business unit
In Progress

Business Unit : Brooklyn Department : IT

Quarterly Appraisal (Q1), 2015

Configure Questions For All Employees

BACK

All | Selected

+ Add New Question

Questions	Manager Comments	Manager Ratings	Employee Comments	Employee Ratings
<input checked="" type="checkbox"/> Check All d	<input checked="" type="checkbox"/> Manager Comments	<input checked="" type="checkbox"/> Manager Ratings	<input checked="" type="checkbox"/> Employee Comments	<input checked="" type="checkbox"/> Employee Ratings f
<input checked="" type="checkbox"/> c	<input checked="" type="checkbox"/> Manager Comments	<input checked="" type="checkbox"/> Manager Ratings	<input checked="" type="checkbox"/> Employee Comments	<input checked="" type="checkbox"/> Employee Ratings e
<input checked="" type="checkbox"/> h Explain about new technologies that you have learned? How you achieve your goals? i	<input checked="" type="checkbox"/> Manager Comments	<input checked="" type="checkbox"/> Manager Ratings	<input checked="" type="checkbox"/> Employee Comments	<input checked="" type="checkbox"/> Employee Ratings

SAVE & INITIALIZE SAVE & INITIALIZE LATER DISCARD

Figure 5.8

2. Customized Employee Groups

- Apply appraisal parameters by grouping employees
- Choose or add questions to be enabled to all employees for the selected business unit or department
- Choose ratings and/or comments for each question by line manager and employee

- Click on **Customized Employee Groups**
- Click **Yes** in the Confirmation alert box

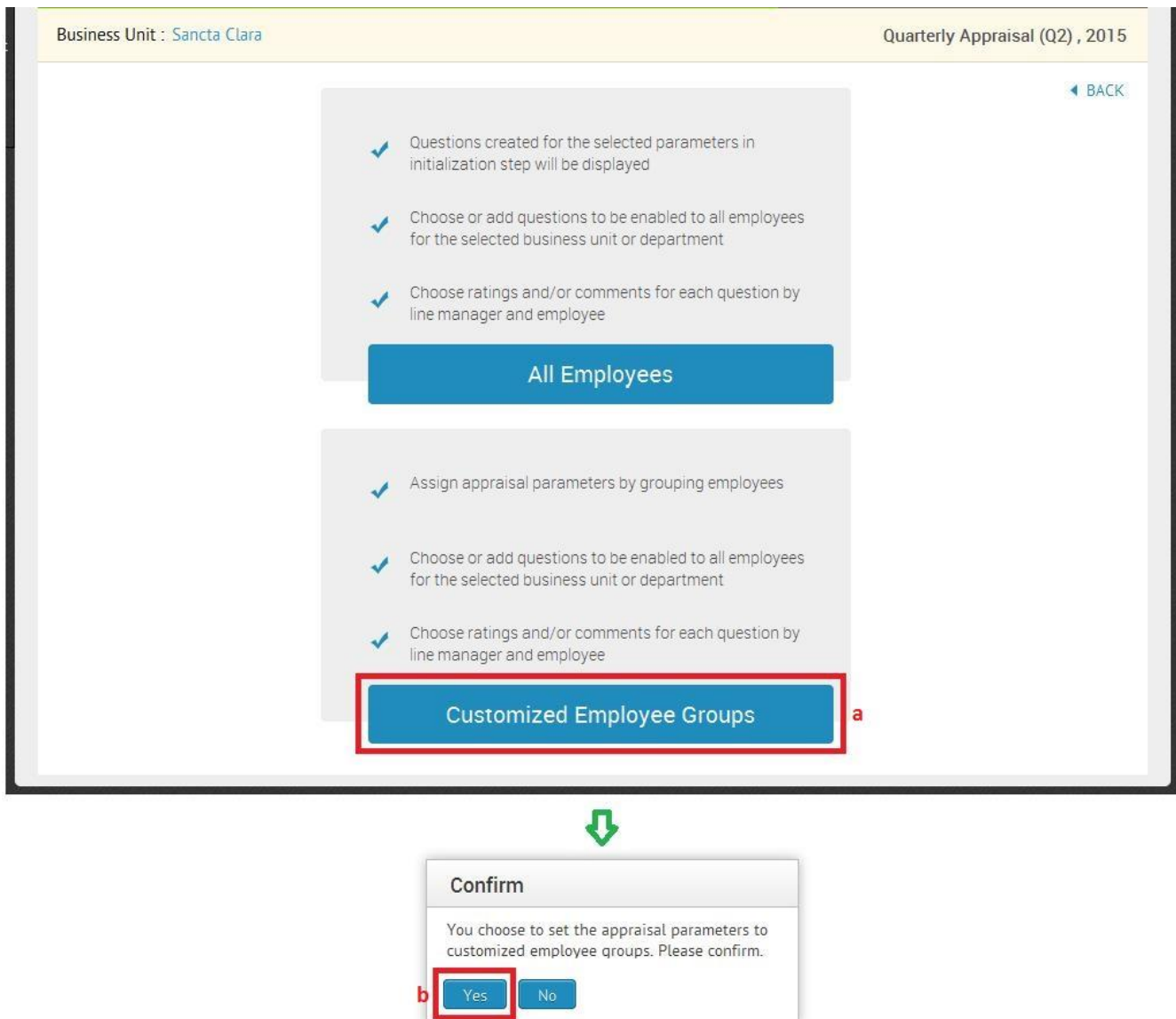


Figure 6

- c. Click on Create New Group
- d. Enter group name
- e. Select employees applicable for the appraisal process
- f. Select Questions individually by checking the checkbox respective to each question

Or

- g. Select all the questions by checking the Check All option in the table header
- h. Select ratings or comments of manager or employee individually for all the questions

Or

- i. Select ratings or comments of manager or employee by checking the Manager Rating, Manager Comments, Employee Ratings and Employee Comments
- j. Click on Add New Question to add more questions to the appraisal process
- k. Click on Save to Configure Appraisal Parameters

Refer Figure 6.1

Business Unit : **Cyber Towers** Department : **Development** Quarterly Appraisal (Q1) , 2015

Customized Employee Groups

CREATE NEW GROUP **DISCARD**

Group Name * **d**

Employees

Search Employee

Dolce Warner
(EMPP0043)
Software Engineer **e**

Selected Employees (0)

Search Employee

Add employees to group.

All | **Selected** **j** **+ Add New Question**

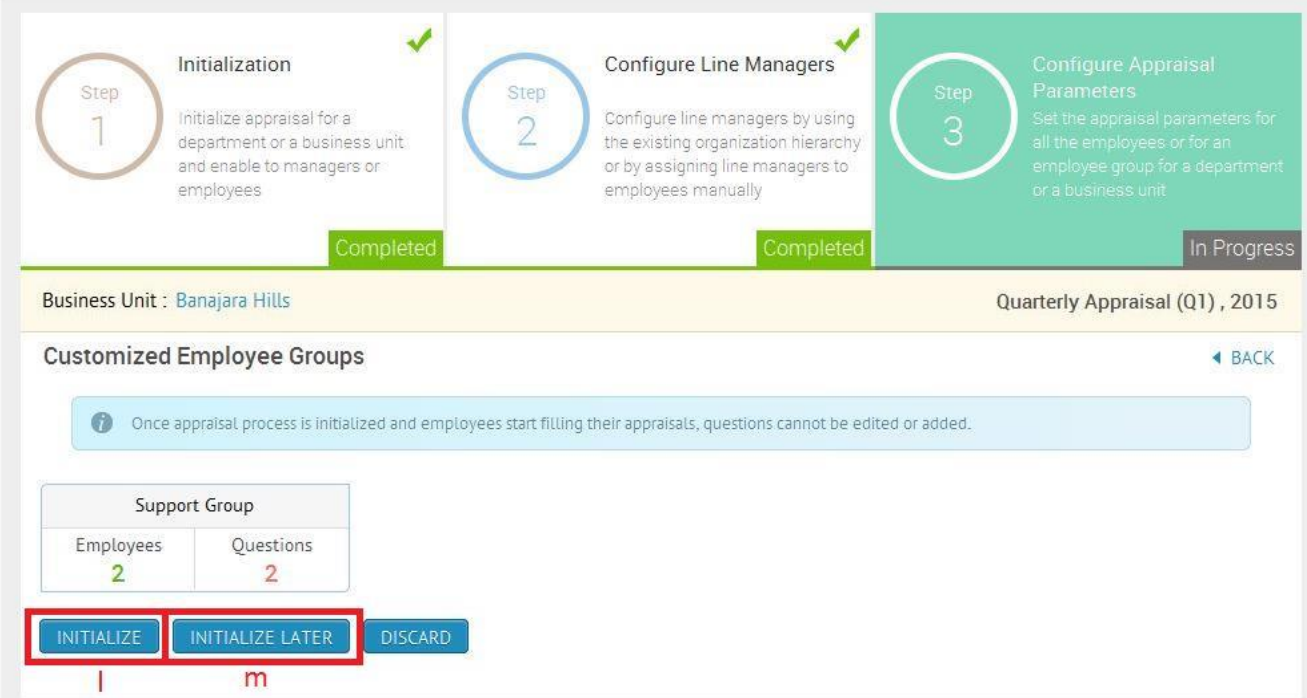
<input checked="" type="checkbox"/> Check All g	Questions	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings i <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/> f	Projects/ Work areas *Briefly explain 1. At a high level, the projects you have worked on	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings h <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/>	Personality *Briefly explain 1. The qualities/traits that you have honed in the past one year	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/>	Skills *Briefly describe 1. The skill sets that you have worked on and the areas in which you have bettered over the past one year	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings

SAVE **k** Close

Figure 6.1

- l. Upon Saving the appraisal parameters, click on initialize to initialize the appraisal process
- m. Click on Initialize Later to only save the appraisal process
- n. Click on Yes in the confirmation box to initialize the appraisal

Refer Figure 6.2



Step 1 Initialization Completed
Initialize appraisal for a department or a business unit, and enable to managers or employees

Step 2 Configure Line Managers Completed
Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually

Step 3 Configure Appraisal Parameters In Progress
Set the appraisal parameters for all the employees or for an employee group for a department or a business unit

Business Unit : Banajara Hills Quarterly Appraisal (Q1) , 2015

Customized Employee Groups BACK

Once appraisal process is initialized and employees start filling their appraisals, questions cannot be edited or added.

Support Group	
Employees	Questions
2	2

INITIALIZE **INITIALIZE LATER** **DISCARD**

I m



Confirm

- Line Manager(s) cannot be edited after initialization.
Appraisal will be initialized. Do you wish to continue?

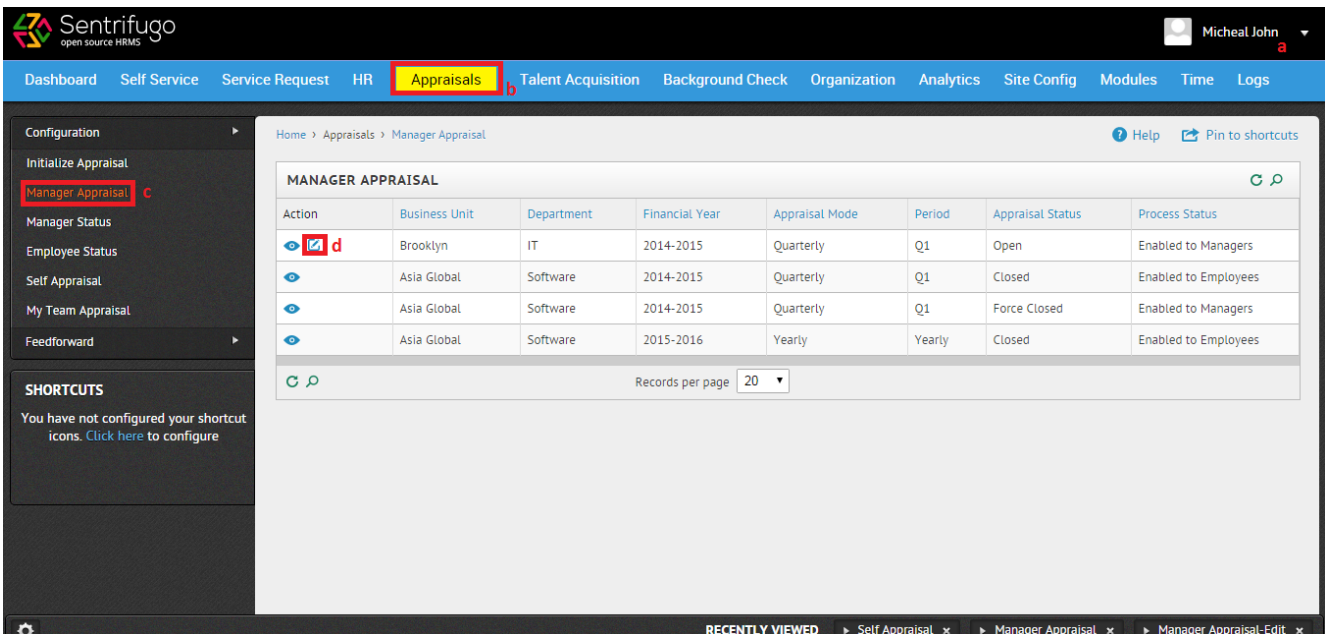
Yes **No**

Figure 6.2

Manager Appraisal

In the first step of Initialize appraisal, if the appraisal is enabled to managers, managers can configure the appraisal parameters. Once the parameters are set, manager creates employee groups and applies the appraisal parameters to the group. Upon saving the appraisal settings, the HR will be able to change the status of appraisal process from “Enabled to Managers” to “Enabled to Employees”.

- Login as a manager
- Go to **Appraisals** in the top menu
- Select the option **Manager Appraisal** in the submenu on the left side panel
- Click on edit icon with respect to an appraisal process








Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
 	Brooklyn	IT	2014-2015	Quarterly	Q1	Open	Enabled to Managers
	Asia Global	Software	2014-2015	Quarterly	Q1	Closed	Enabled to Employees
	Asia Global	Software	2014-2015	Quarterly	Q1	Force Closed	Enabled to Managers
	Asia Global	Software	2015-2016	Yearly	Yearly	Closed	Enabled to Employees

Figure 7

- Create new group (E.g., Support, Testing, Development, etc.)
- Add employees to the group by clicking on an employee
- Click on Add New Question to add questions for a particular group of employees
- Select Questions individually by checking the checkbox respective to each question

Or

- Select all the questions by checking the Check All option in the table header
- Select ratings or comments of manager or employee individually for all the questions

Or

- k. Select ratings or comments of manager or employee by checking the Manager Rating, Manager Comments, Employee Ratings and Employee Comments
- l. Click on Save

Initialization Details

[BACK](#)

Business Unit	Jubilee Hills	Department	--
Appraisal Mode	Half yearly	From Year	2014
To Year	2015	Period	H1
Status	Open	Eligibility	Full Time,Permanent,Probationary
Enable To	Managers	Parameters	Generic
Managers Due Date	05/27/15	Process Status	Enabled to Managers
Appraisal Ratings	1-5		

Group Details

[CREATE NEW GROUP](#)
[SUBMIT INITIALIZATION](#)

Group Name *

Employees

Employee 1
(EMPP0029)
Software Engineer

Selected Employees (0)

Employee 8
(EMPP0029)
Software Engineer

Configure Appraisal Parameters for All Employees

[All](#) | [Selected](#)
[+ Add New Question](#)

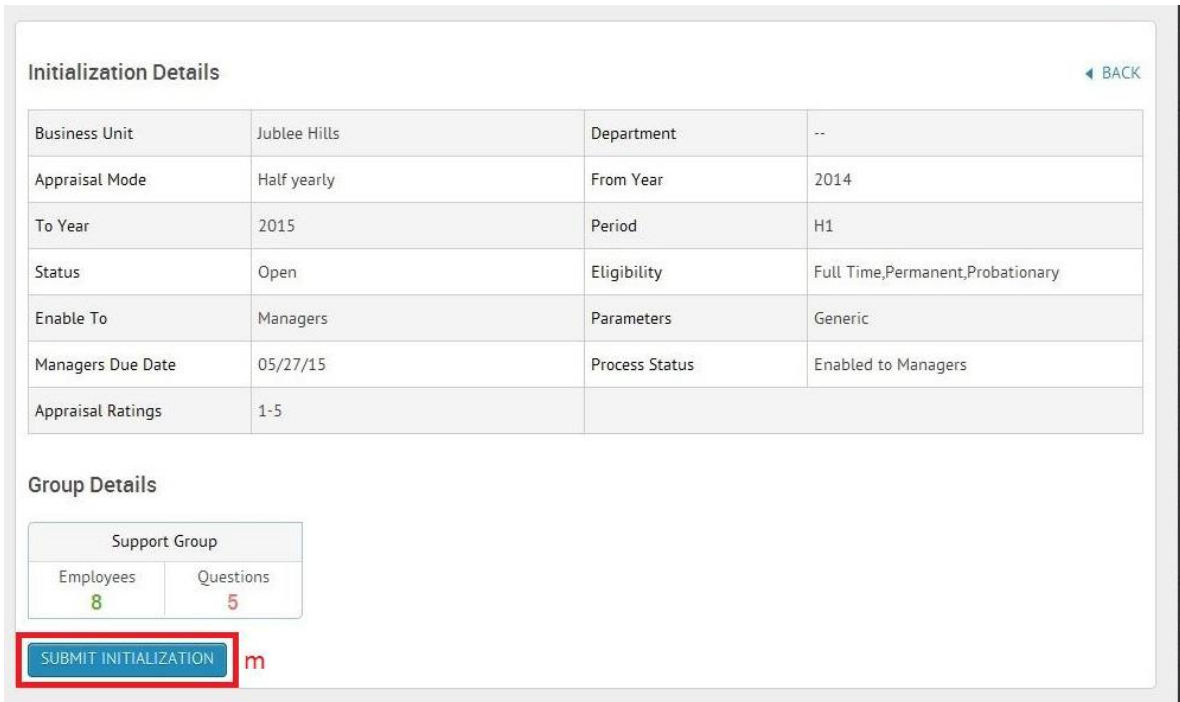
<input checked="" type="checkbox"/> Check All	Questions	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/>	New Technologies/skills learn and implemented What are the new technologies/skills you explored and implemented?	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/>	Responsibility Have you taken complete ownership of the task/project/product assigned to you?	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings

[SAVE](#) | [Close](#)

Figure 7.1

Upon saving appraisal details, the manager must submit the appraisal process for initialization.

m. Click on Submit Initialization



Initialization Details BACK

Business Unit	Jubilee Hills	Department	--
Appraisal Mode	Half yearly	From Year	2014
To Year	2015	Period	H1
Status	Open	Eligibility	Full Time, Permanent, Probationary
Enable To	Managers	Parameters	Generic
Managers Due Date	05/27/15	Process Status	Enabled to Managers
Appraisal Ratings	1-5		

Group Details

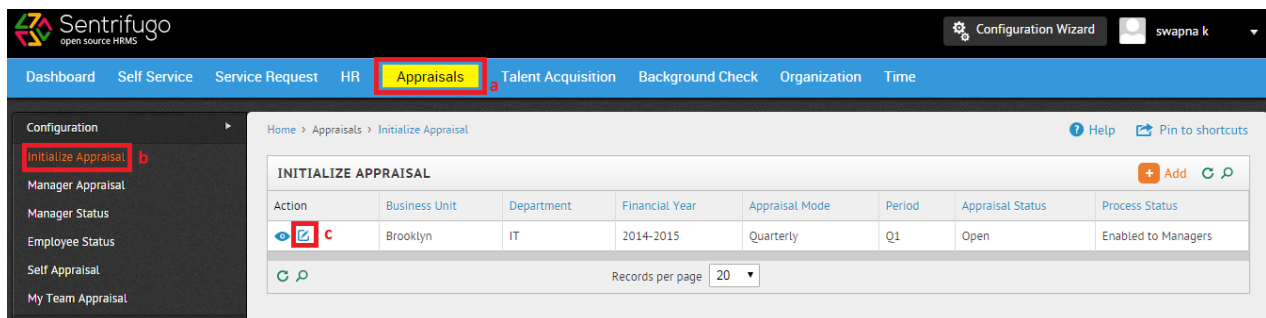
Support Group	
Employees	Questions
8	5

SUBMIT INITIALIZATION m

Figure 7.2

The HR, then, will update the appraisal process by changing the process status from “Enable to Managers” to “Enable to Employees” and providing Employee Due Date.

- Go to **Appraisals** in the top menu
- Select the option **Initialize Appraisal** in the submenu on the left side panel
- Click on edit icon with respect to an appraisal process



Sentrifugo open source HRMS Configuration Wizard swapna k

Dashboard Self Service Service Request HR **Appraisals** Talent Acquisition Background Check Organization Time

Configuration **Initialize Appraisal** Manager Appraisal Manager Status Employee Status Self Appraisal My Team Appraisal

Home > Appraisals > Initialize Appraisal Help Pin to shortcuts

INITIALIZE APPRAISAL Add Refresh Filter

Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
	Brooklyn	IT	2014-2015	Quarterly	Q1	Open	Enabled to Managers

Records per page 20

Figure 7.3

- d. Select “Enable to Employees” in the Enable To dropdown
- e. Pick a date for Employee Due Date
- f. Click on Update to enable the appraisal process to employees

Step 1 Initialization ✓

Initialize appraisal for a department or a business unit and enable to managers or employees

Completed

Step 2 Configure Line Managers ✓

Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually

Completed

Step 3 Configure Appraisal Parameters ✓

Set the appraisal parameters for all the employees or for an employee group for a department or a business unit

Completed

Appraisal Details ◀ BACK

Business Unit	Business Unit 1	Department	--
Appraisal Mode	Half yearly	From Year	2014
To Year	2015	Period	H2
Eligibility	Full Time, Permanent, Probationary	Parameters	Generic, KRA, KPI
Status	Open	Process Status	Enabled to Managers
Appraisal Status	<input type="text" value="Open"/>	Managers Due Date	<input type="text" value="05/20/15"/>
Enable To	<input type="text" value="Enable To Employees"/>	Employee Due Date	<input type="text" value="05/29/15"/>
Appraisal Ratings	1-5		

UPDATE

f

Cancel

Figure 7.4

Manager Status

In this page, the HR views the status of appraisal process when it is enabled to the managers.

- a. Go to **Appraisals** in the top menu
- b. Select the option **Manager Status** in the submenu on the left side panel
- c. Select the Business Unit
- d. Select the Department

- e. Select the Manager Appraisal Status if required
- f. Managers and their status will be displayed

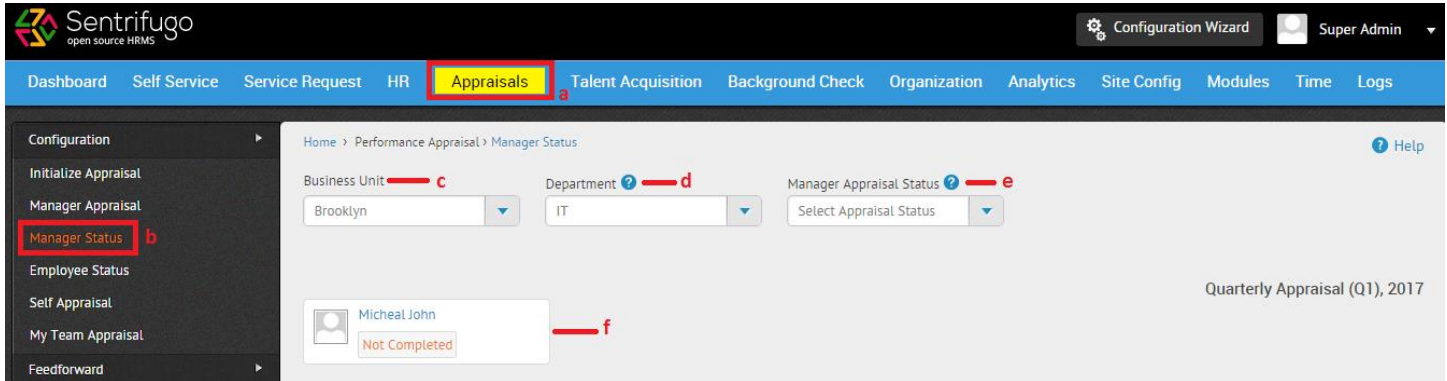


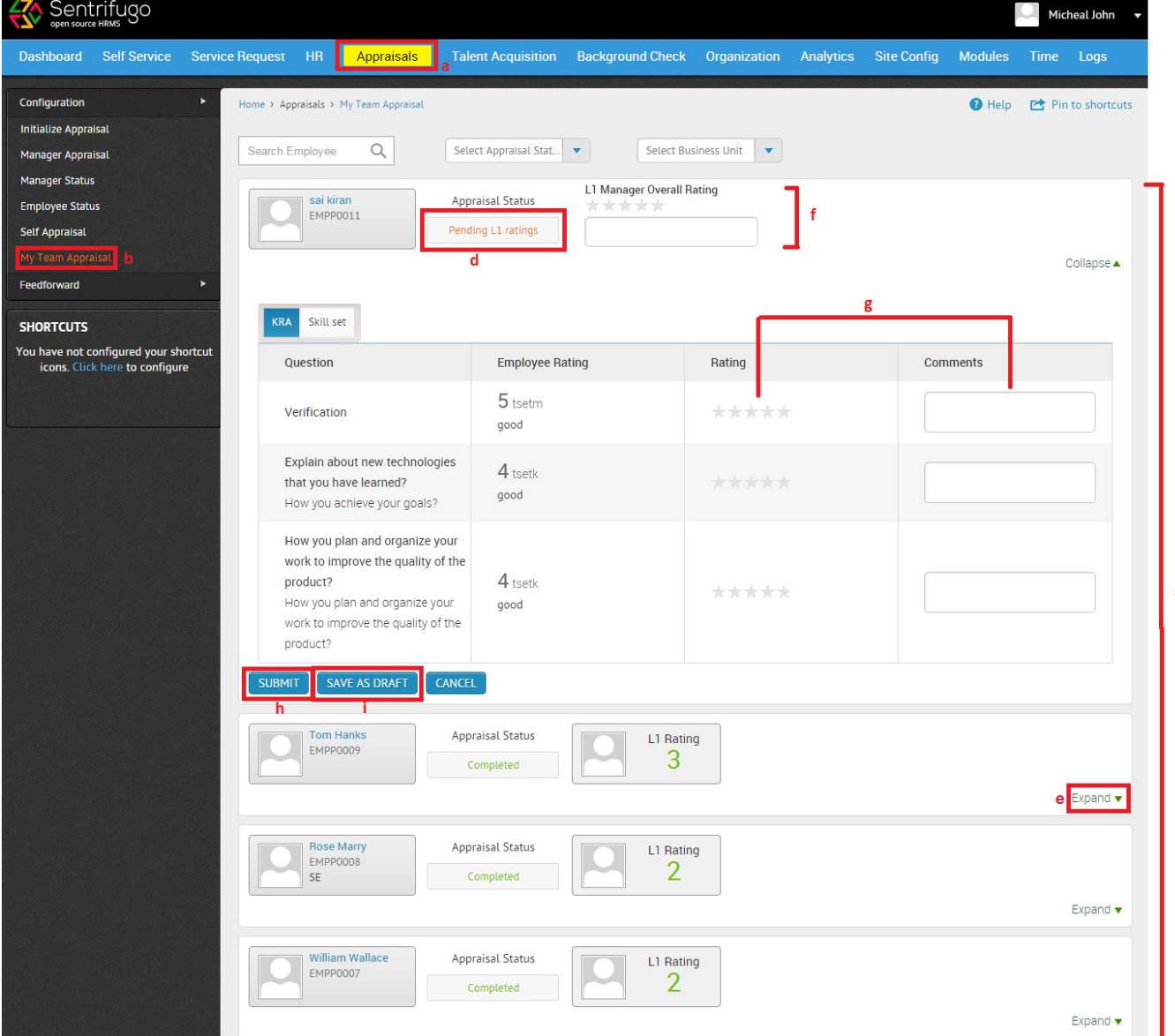
Figure 8

My Team Appraisal

Managers will be able to view their team employees' appraisal status. Once the employees completes the appraisal process, the managers will be able to provide ratings and comments to the employees. Based on the levels of appraisal, the employee appraisal process will be enabled to the line managers.

- a. Go to **Appraisals** in the top menu
- b. Select the option **My Team Appraisal** in the submenu on the left side panel
- c. All the employees in the manager's team will be displayed
- d. The status of each employee's appraisal is displayed
- e. Click on Expand to provide Manager's rating
- f. Provide overall rating and comment for an employee
- g. Provide the rating and comments respectively
- h. Click on Submit to send it for approval based on the levels of appraisal
- i. Click on Save as draft to save the ratings and comments

Refer Figure 9



Appraisals

Home > Appraisals > My Team Appraisal

Search Employee Select Appraisal Stat... Select Business Unit

Appraisal Status
Pending L1 ratings

L1 Manager Overall Rating
★★★★★

Table of Appraisals:

Question	Employee Rating	Rating	Comments
Verification	5 tsetm good	★★★★★	<input type="text"/>
Explain about new technologies that you have learned? How you achieve your goals?	4 tsetk good	★★★★★	<input type="text"/>
How you plan and organize your work to improve the quality of the product? How you plan and organize your work to improve the quality of the product?	4 tsetk good	★★★★★	<input type="text"/>

Buttons: SUBMIT, SAVE AS DRAFT, CANCEL

Appraisal Summary Table:

Employee	Appraisal Status	L1 Rating
Tom Hanks EMPP0009	Completed	3
Rose Marry EMPP0008 SE	Completed	2
William Wallace EMPP0007	Completed	2

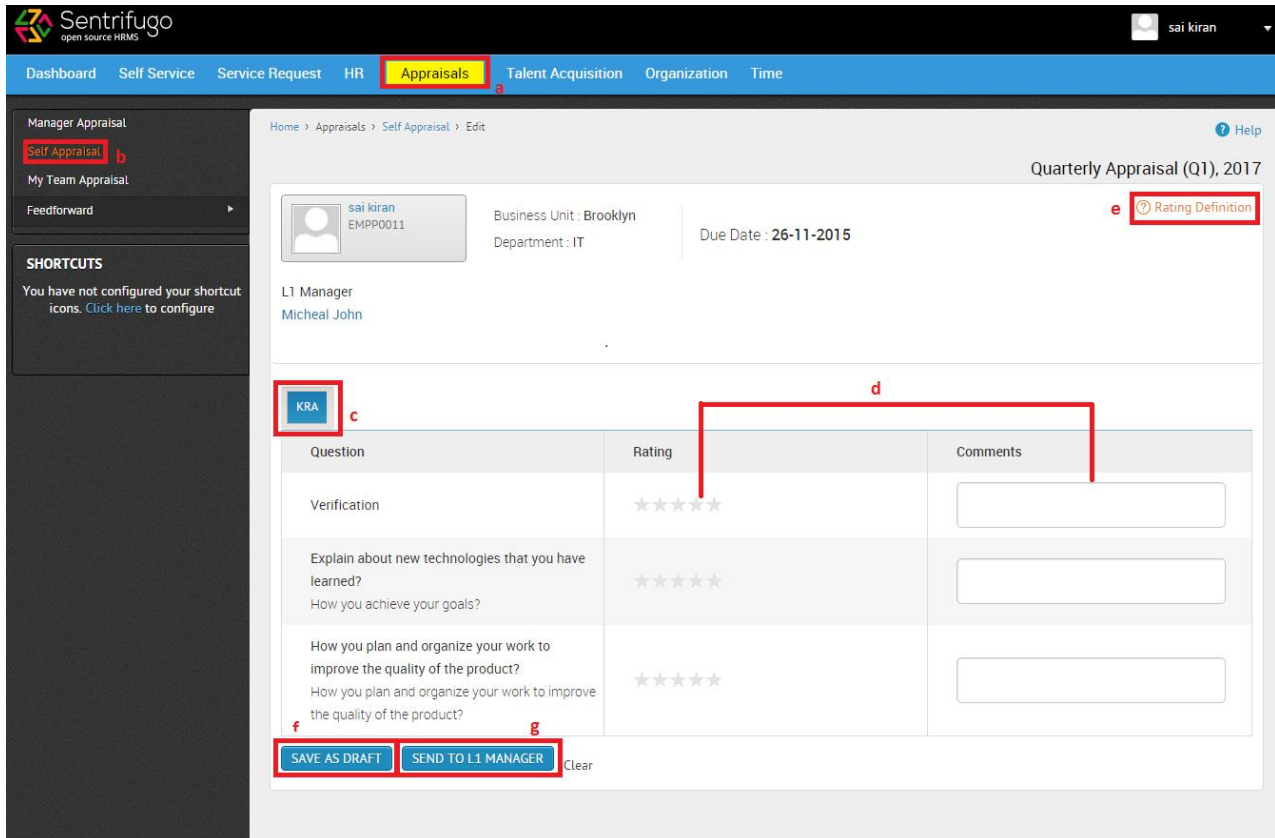
Figure 9

Self Appraisal

Self-appraisal is displayed to all the employees as each and every employee is subject to appraisal process. Here, the employees will provide self-appraisal details such as ratings and comments. Upon completion of self-appraisal, their appraisal will be visible to their line managers for further ratings and comments

- Go to **Appraisals** in the top menu

- Select the option **Self Appraisal** in the submenu on the left side panel
- The parameters are displayed above the questions grid
- Provide rating and comments for every question
- Click on Rating definition to know more about ratings
- Click on Send to L1 Manager to send it to manager
- Click on Save as Draft to only save the appraisal process



Home > Appraisals > Self Appraisal > Edit

Quarterly Appraisal (Q1), 2017

sai kiran
EMP0011

Business Unit : Brooklyn
Department : IT

Due Date : 26-11-2015

L1 Manager
Micheal John

KRA

Question	Rating	Comments
Verification	★★★★★	
Explain about new technologies that you have learned? How you achieve your goals?	★★★★★	
How you plan and organize your work to improve the quality of the product? How you plan and organize your work to improve the quality of the product?	★★★★★	

SAVE AS DRAFT **SEND TO L1 MANAGER** Clear

Rating Definition

Figure 10

Employee Status

HR and Management roles will be able to view the employee appraisal status.

- Go to **Appraisals** in the top menu
- Select the option **Employee Status** in the submenu on the left side panel
- Select the Business Unit
- Select the Department

- e. Select Appraisal Status if required
- f. Employees and their appraisal status will be displayed

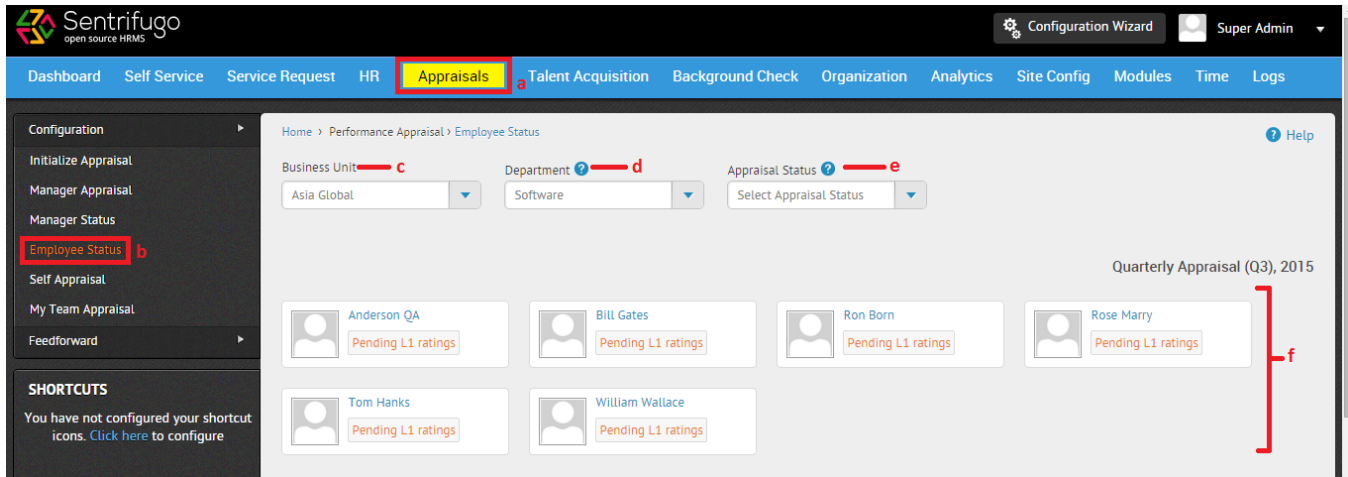


Figure 11

Feed Forward

Feed Forward is the feedback given by the employees to appraise their respective line managers. All the configurations are done on management level. Once all the employees have appraised their managers, managers' appraisal process will be carried out by the management.

Questions

Questions are added by the Management to evaluate managers' performance.

- a. Go to **Appraisals** in the top menu
- b. Select the option **Feedforward** in the submenu on the left side panel
- c. Select the option **Questions** in the child menu
- d. Click on **+ Add** in the top right corner of the grid

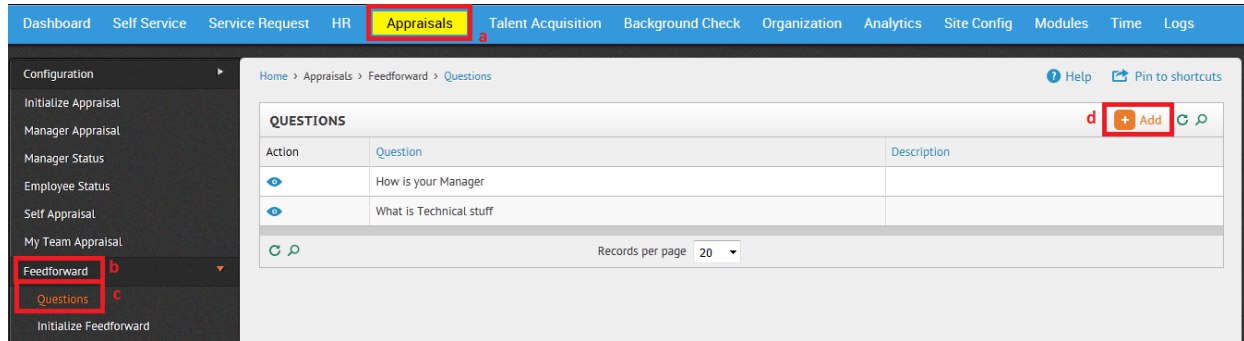


Figure 12

- e. Add the question and description if required
- f. Click on Add New Question to add more questions
- g. Click on Save

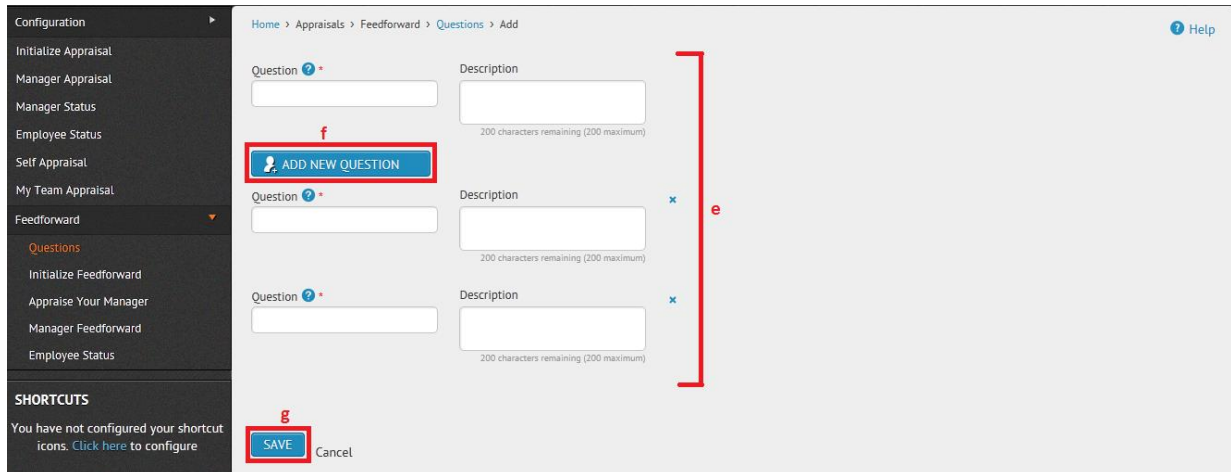


Figure 12.1

Initialize feed forward

In the initialize feed forward page, only the appraisal that have "Closed" status are displayed.

Appraisal: Select the appraisal from the populated dropdown. The appraisal details grid is displayed in the screen where Business Unit, Department, Appraisal Mode, From Year, To Year and Period are displayed.

Status: Feed Forward status will be "Open" by default. Upon the initialization of feed forward, close and force close options will be made available

- Force Close: Closes the Appraisal Process by force. Appraisal Process for the selected Business Unit can be configured again and for the same appraisal period
- Close: Closes the appraisal process for the selected business unit permanently

Employee Details: Here, the Management will determine if the management can view only the feedback given by the employee or the feedback along with the employee names.

Show: Employee names and their feedbacks will be displayed

Hide: Only the feedbacks will be displayed

Enable to: The Management will determine if all employees can appraise their managers or only the employees eligible for appraisal

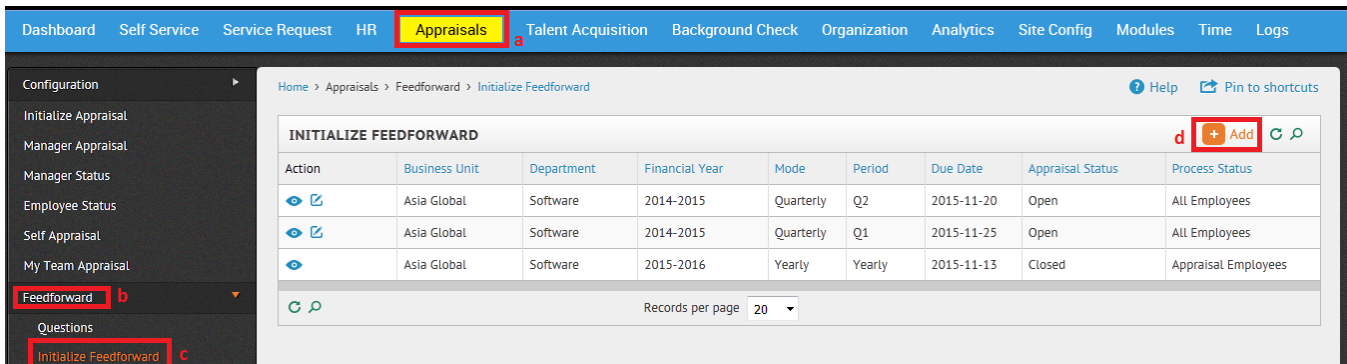
Appraisal Employees: All the employees eligible for appraisal process can appraise their managers

All Employees: All the employees in the organization can appraise their managers

Due Date: The due date is for closing the Feed Forward process for employees

Configure Questions: All the questions added by the Management will be displayed. If more questions are to be added, Add New Question link is also provided.

- Go to **Appraisals** in the top menu
- Select the option **Feedforward** in the submenu on the left side panel
- Select the option **Initialize Feedforward** in the child menu
- Click on **+ Add** in the top right corner of the grid



Home > Appraisals > Feedforward > Initialize Feedforward

INITIALIZE FEEDFORWARD

Action	Business Unit	Department	Financial Year	Mode	Period	Due Date	Appraisal Status	Process Status
	Asia Global	Software	2014-2015	Quarterly	Q2	2015-11-20	Open	All Employees
	Asia Global	Software	2014-2015	Quarterly	Q1	2015-11-25	Open	All Employees
	Asia Global	Software	2015-2016	Yearly	Yearly	2015-11-13	Closed	Appraisal Employees

Records per page: 20

Figure 12.2

- Select an appraisal process from the Appraisal dropdown
- The Status will be by default selected as Open
- Define whether or not you want to view the employee details along with their feedback ratings and comments
- Enable Feed Forward to all employees or only to employees who are eligible for Appraisal process
- Pick a date for employees to provide their feedback
- Click on Add New Question to add questions for Feed Forward
- Select Questions individually by checking the checkbox respective to each question

Or

- l. Select all the questions by checking the Check All option in the table header
- m. Select comments individually for all the questions

Or

- n. Select comments by checking the Comments checkbox in the table header
- o. Click on Save & Initialize to initialize the Feed Forward process
- p. Click on Save & Initialize Later to only save the Feed Forward process

Home > Appraisals > Feedforward > Initialize Feedforward > Add

Appraisal **e** **f** **g** ☐ Show ☒ Hide **h** ☒ Appraisal Employees ☐ All Employees

Due Date **i**

Configure Questions

j [+ Add New Question](#)

<input checked="" type="checkbox"/> Check All k	Questions	<input checked="" type="checkbox"/> Comments n	<input checked="" type="checkbox"/> Ratings
<input checked="" type="checkbox"/> k	How is your Manager	<input checked="" type="checkbox"/> Comments m	<input checked="" type="checkbox"/> Ratings
<input checked="" type="checkbox"/>	What is Technical stuff	<input checked="" type="checkbox"/> Comments	<input checked="" type="checkbox"/> Ratings

o [SAVE & INITIALIZE](#) **p** [SAVE & INITIALIZE LATER](#) [Cancel](#)

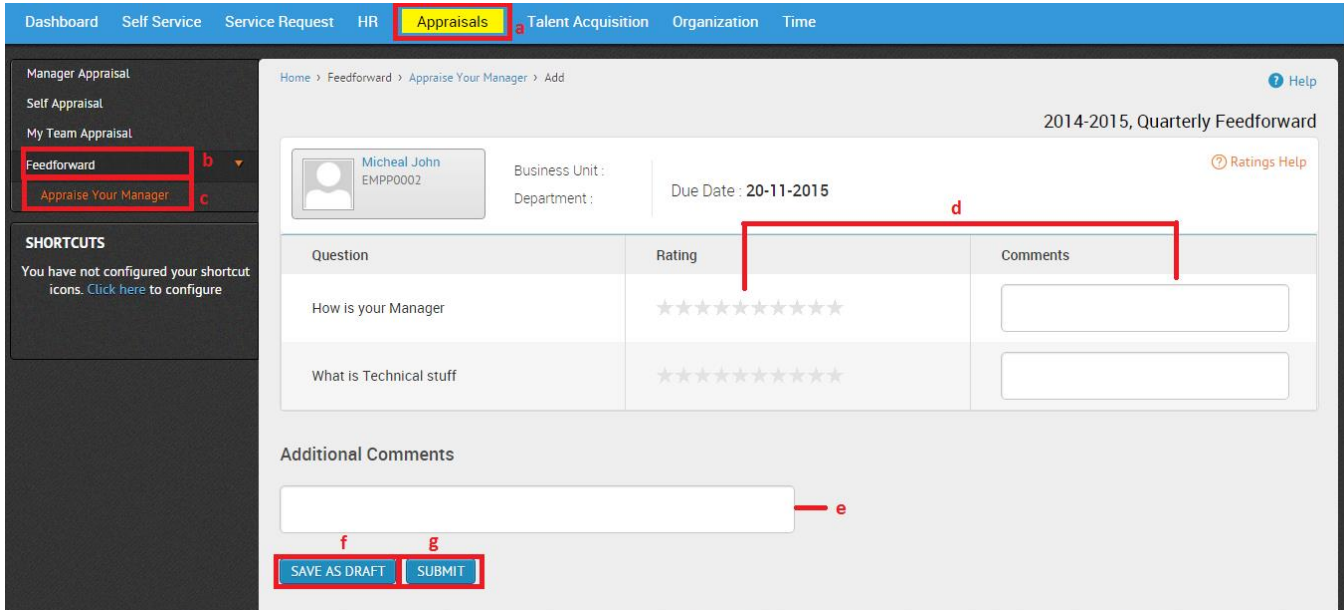
Figure 12.3

Appraise Your Managers

The employees will be able to view the questions established to appraise their line managers. They can provide ratings and comments for each question and the manager feed forward is submitted.

- Go to **Appraisals** in the top menu
- Select the option **Feedforward** in the submenu on the left side panel
- Select the option **Appraise Your Manager** in the child menu
- Provide ratings and comments
- Enter additional comments (not mandatory)

- f. Click on Save as Draft to save Feed Forward
- g. Click on Submit to submit Feed Forward



Dashboard Self Service Service Request HR **Appraisals** Talent Acquisition Organization Time

Manager Appraisal
Self Appraisal
My Team Appraisal
Feedforward
Appraise Your Manager

SHORTCUTS
You have not configured your shortcut icons. [Click here](#) to configure

Home > Feedforward > Appraise Your Manager > Add

2014-2015, Quarterly Feedforward

Micheal John
EMPP0002

Business Unit :
Department :

Due Date : 20-11-2015

Question	Rating	Comments
How is your Manager	★★★★★★★★	
What is Technical stuff	★★★★★★★★	

Additional Comments

SAVE AS DRAFT SUBMIT

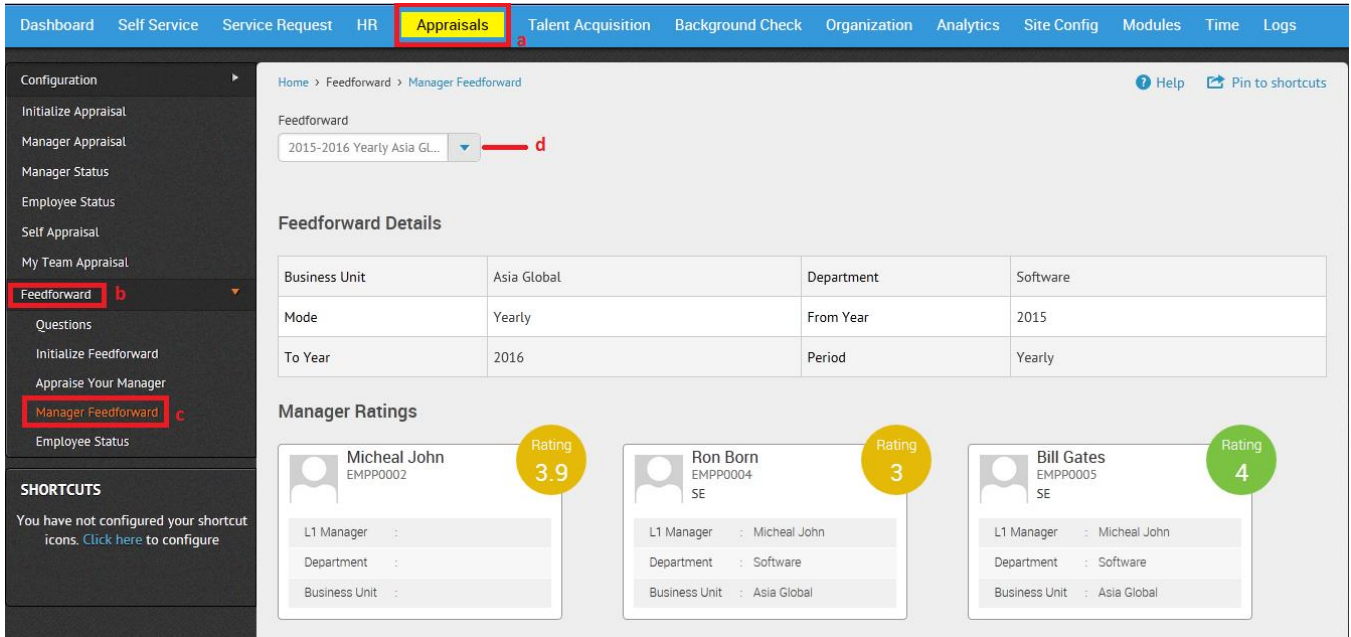
Figure 12.4

Manager Feed Forward

Only the Management will be able to view managers feed forward. Upon selection of appraisal from the dropdown, feed forward details along with the manager ratings are displayed. The average ratings of all the employee will be highlighted. A detailed description of comments and ratings of employees are displayed by question or by employee.

- a. Go to **Appraisals** in the top menu
- b. Select the option **Feedforward** in the submenu on the left side panel
- c. Select the option **Manager Feedforward** in the child menu
- d. Select a process to Feed Forward details in the dropdown

Refer Figure 12.5



Dashboard Self Service Service Request HR **Appraisals** Talent Acquisition Background Check Organization Analytics Site Config Modules Time Logs

Configuration
 Initialize Appraisal
 Manager Appraisal
 Manager Status
 Employee Status
 Self Appraisal
 My Team Appraisal
Feedforward
 Questions
 Initialize Feedforward
 Appraise Your Manager
Manager Feedforward
 Employee Status

SHORTCUTS
 You have not configured your shortcut icons. [Click here to configure](#)


Home > Feedforward > Manager Feedforward


Feedforward
 2015-2016 Yearly Asia GL... **d**

Feedforward Details

Business Unit	Asia Global	Department	Software
Mode	Yearly	From Year	2015
To Year	2016	Period	Yearly

Manager Ratings


Micheal John
 EMPP0002
 Rating **3.9**
 L1 Manager :
 Department :
 Business Unit :


Ron Born
 EMPP0004
 SE
 Rating **3**
 L1 Manager : Micheal John
 Department : Software
 Business Unit : Asia Global


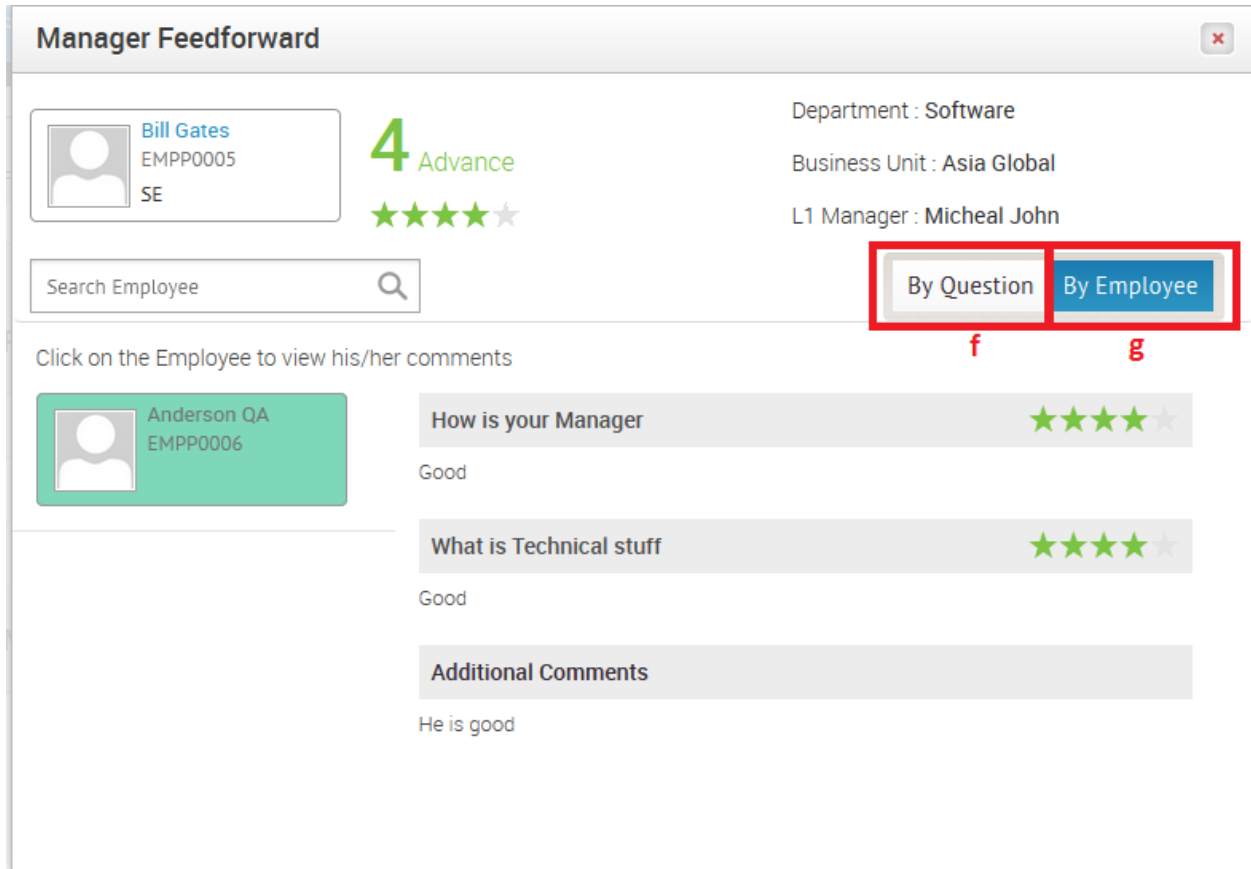

Bill Gates
 EMPP0005
 SE
 Rating **4**
 L1 Manager : Micheal John
 Department : Software
 Business Unit : Asia Global

Figure 12.5

- e. Click on individual manager section to view the ratings and comments provided by employees
- f. Select 'By Questions' to view the ratings and comments based on questions
- g. Select 'By Employee' to view the ratings and comments of each employee

Refer Figure 12.6



Manager Feedforward

Bill Gates
EMPP0005
SE

4 Advance
★★★★☆

Department : Software
Business Unit : Asia Global
L1 Manager : Micheal John

Search Employee

Click on the Employee to view his/her comments

Anderson QA
EMPP0006

How is your Manager ★★★★★
Good

What is Technical stuff ★★★★★
Good

Additional Comments
He is good

By Question By Employee

f g

e

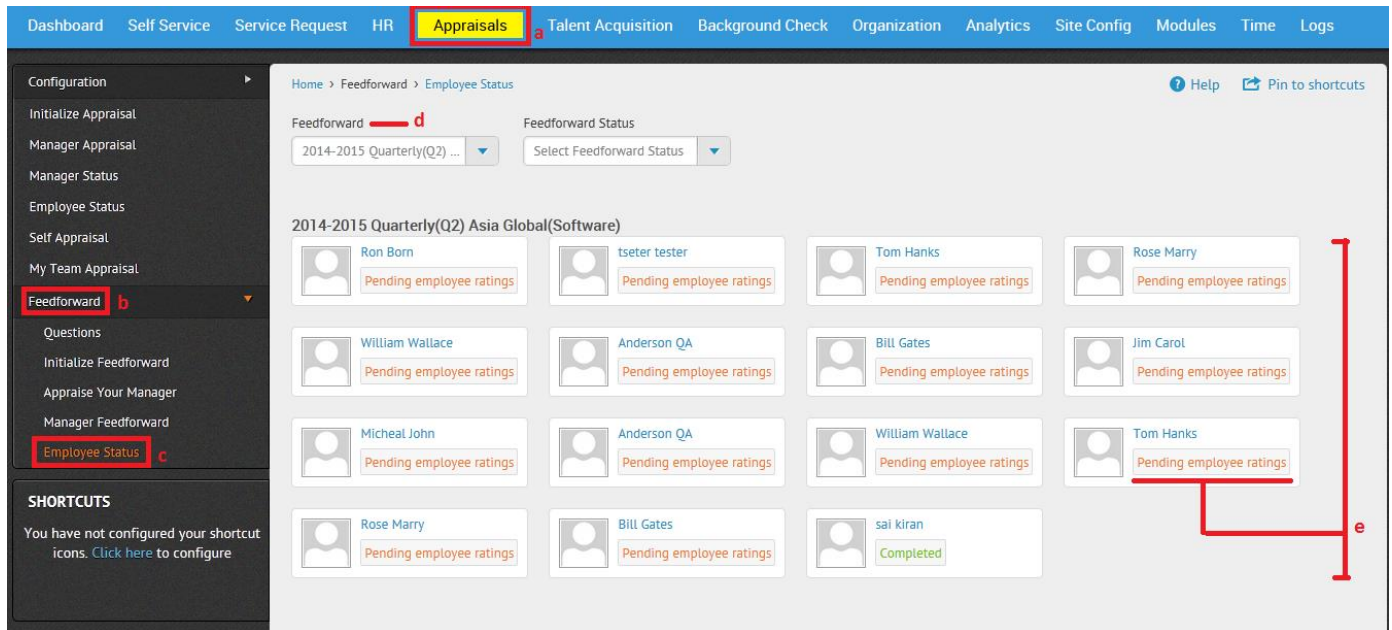
Figure 12.6

Employee Status

Management will be able to view the feed forward status of all the employees.

- Go to **Appraisals** in the top menu
- Select the option **Feedforward** in the submenu on the left side panel
- Select the option **Employee Status** in the child menu
- Select a process to Feed Forward details in the dropdown
- The employees of the selected process along with their Feed Forward status will be displayed

Refer Figure 12.7



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, **Appraisals** (highlighted with 'a'), Talent Acquisition, Background Check, Organization, Analytics, Site Config, Modules, Time, and Logs. The left sidebar contains a Configuration menu with options like Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, **Feedforward** (highlighted with 'b'), Questions, Initialize Feedforward, Appraise Your Manager, Manager Feedforward, and **Employee Status** (highlighted with 'c'). The main content area displays the '2014-2015 Quarterly(Q2) Asia Global(Software)' section. It includes a 'Feedforward' dropdown (highlighted with 'd') set to '2014-2015 Quarterly(Q2) ...' and a 'Feedforward Status' dropdown set to 'Select Feedforward Status'. Below this is a grid of employee status cards. Most cards show 'Pending employee ratings', while one card for 'sai kiran' shows 'Completed'. A red bracket on the right side of the grid is labeled 'e'.

Employee Name	Status
Ron Born	Pending employee ratings
tseter tester	Pending employee ratings
Tom Hanks	Pending employee ratings
Rose Marry	Pending employee ratings
William Wallace	Pending employee ratings
Anderson QA	Pending employee ratings
Bill Gates	Pending employee ratings
Jim Carol	Pending employee ratings
Micheal John	Pending employee ratings
Anderson QA	Pending employee ratings
William Wallace	Pending employee ratings
Tom Hanks	Pending employee ratings
Rose Marry	Pending employee ratings
Bill Gates	Pending employee ratings
sai kiran	Completed

Figure 12.7