

Sentrifugo

Performance Appraisal Guide

Table of Contents

Performance Appraisal.....	3
Appraisal Settings.....	4
Parameters.....	5
Questions.....	6
Skills.....	7
Ratings.....	8
Initialize Appraisal.....	9
Configure Line Managers.....	11
Discard Line Manager Configuration.....	15
Configure Appraisal Parameters.....	16
Manager Appraisal.....	21
Manager Status.....	25
Employee Status.....	26
My Team Appraisal.....	26
Self Appraisal.....	27
Feed Forward.....	28
Questions.....	29
Initialize feed forward.....	30
Appraise Your Managers.....	32
Manager Feed Forward.....	33
Employee Status.....	35

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.

To configure the appraisal process, first the appraisal settings for the selected business unit or department must be configured.

Appraisal Settings

Appraisal Settings set the mode and ratings for the selected business unit or department. The appraisal mode can be quarterly, half yearly, or yearly. The ratings can be 1-5 or 1-10 depending on the appraisal architecture of the organization. Ratings are provided with description signifying each ratings definition in the appraisal process.

- Click on Performance Appraisal in the header
- Click on Configurations on the left side panel
- Click on Appraisal Settings submenu
- Click on Add in the right side panel

Refer Figure 1

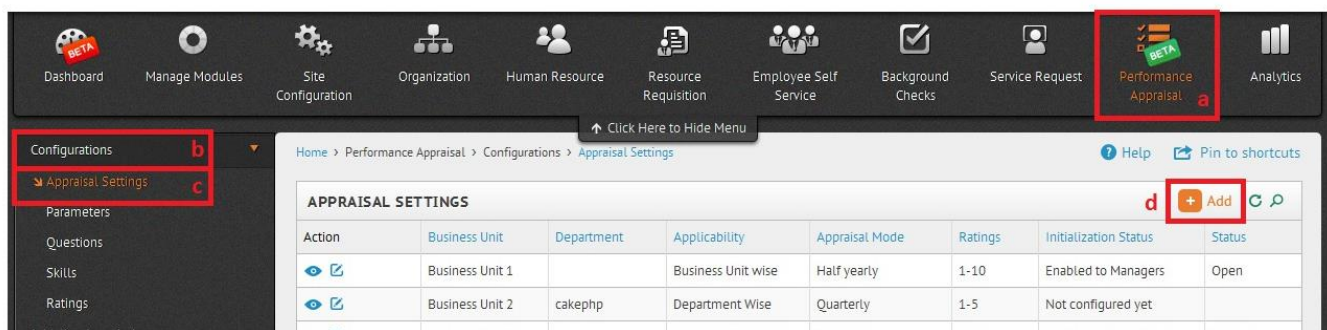


Figure 1

In Add Appraisal Settings screen,

- Select an option in Business Unit dropdown
- Select the applicability
- Select the department based on the previous selections
- Select an option in Appraisal Mode dropdown
- Select an option in Appraisal Ratings dropdown
- Click on Save to save the Appraisal Settings

Refer Figure 2

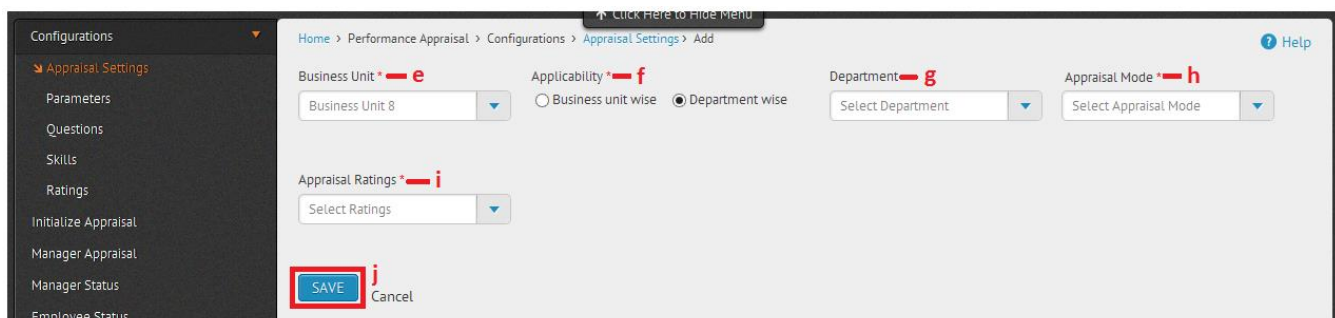


Figure 2

Parameters

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

- Click on Performance Appraisal in the header
- Click on Configurations on the left side panel
- Click on Parameters submenu
- Click on Add in the right side panel

Refer Figure 3

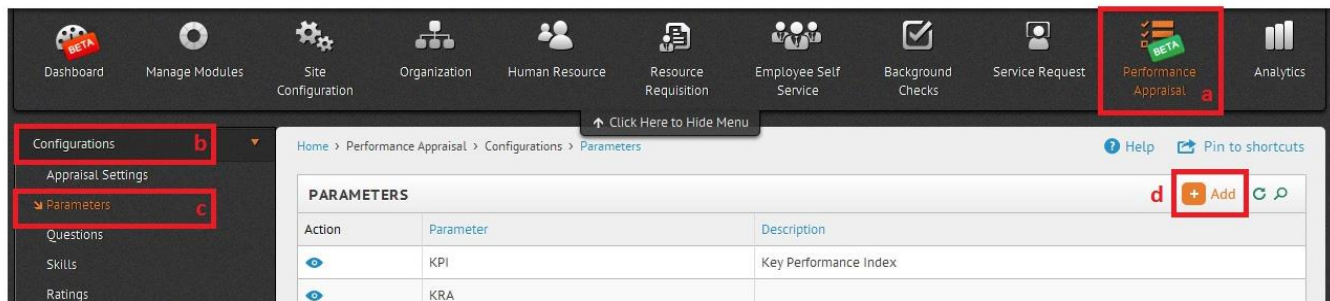


Figure 3

In the Add Parameters screen,

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

Refer Figure 4



Figure 4

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.

- Click on Performance Appraisal in the header
- Click on Configurations on the left side panel
- Click on Questions submenu
- Click on Add in the right side panel

Refer Figure 5

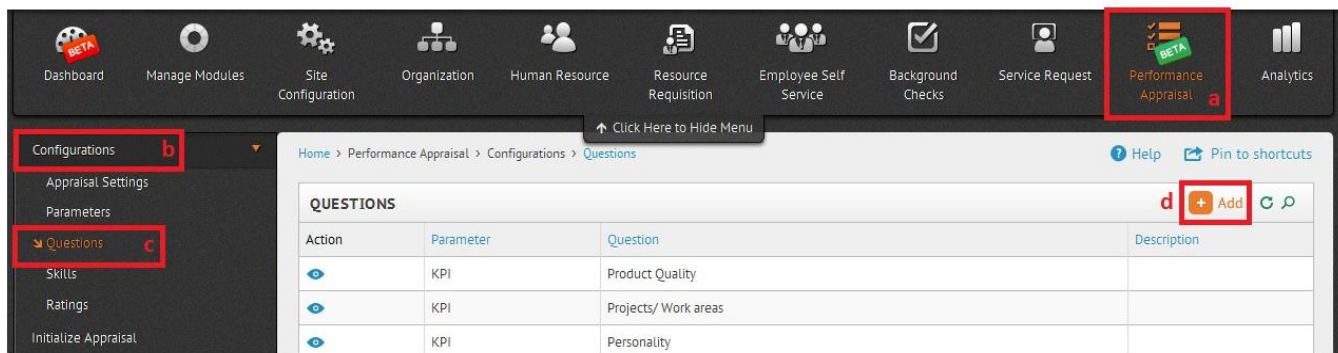


Figure 5

In the Add Questions screen,

- Select an option from the parameters dropdown
- Add other parameter by clicking Add Parameter
- Enter the question
- Provide description if necessary
- Click on “Add New Question” to add questions for the selected parameter
- Click on Save to add questions for the selected parameter

Refer Figure 6

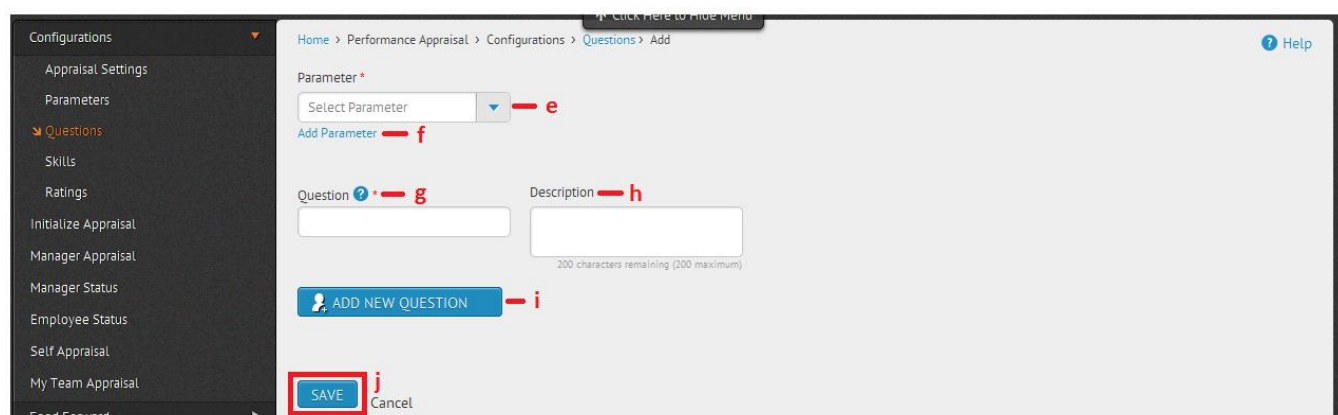


Figure 6

Skills

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

- Click on Performance Appraisal in the header
- Click on Configurations on the left side panel
- Click on Skills submenu
- Click on Add in the right side panel

Refer Figure 7

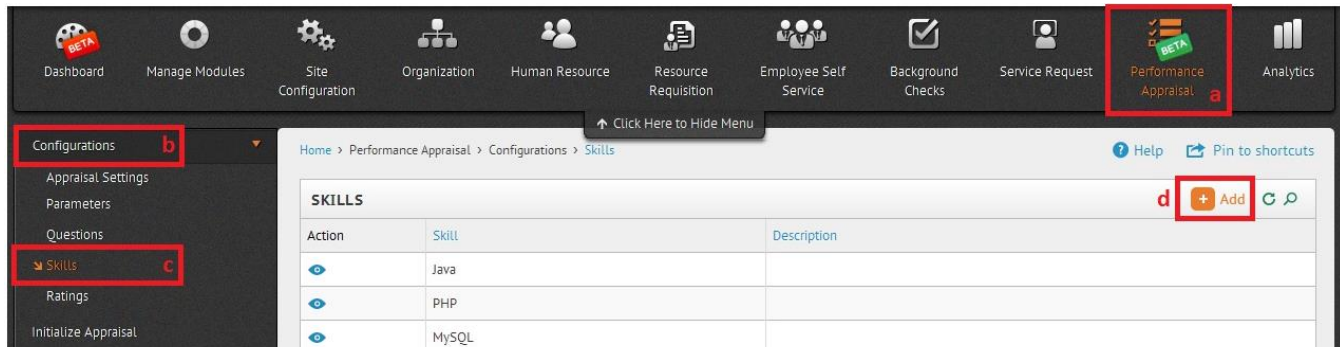


Figure 7

In the Add Skills screen,

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

Refer Figure 8

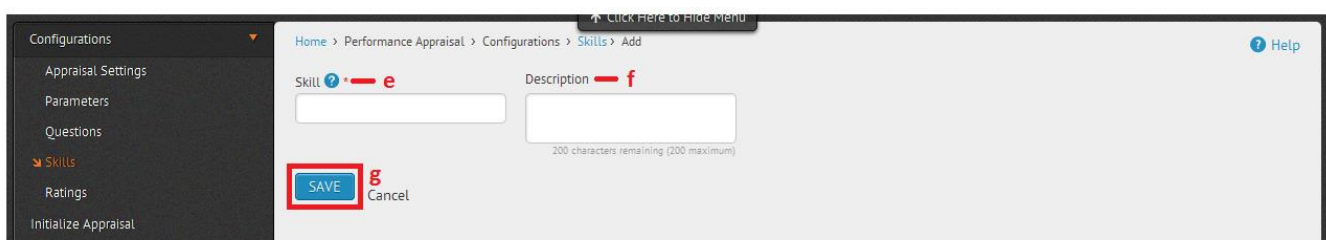


Figure 8

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.

- Click on Performance Appraisal in the header
- Click on Configurations on the left side panel
- Click on Ratings submenu
- Click on Add in the right side panel

Refer Figure 9

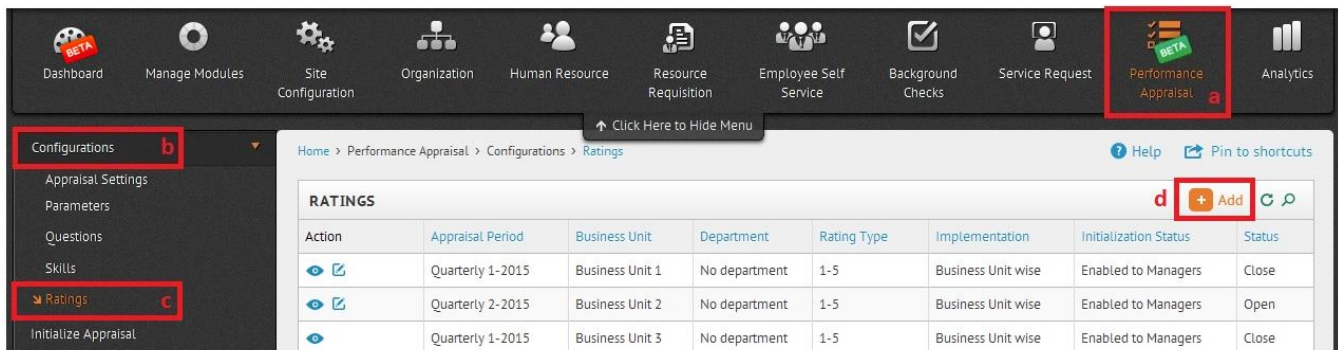


Figure 9

In the Add ratings screen,

- 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 10

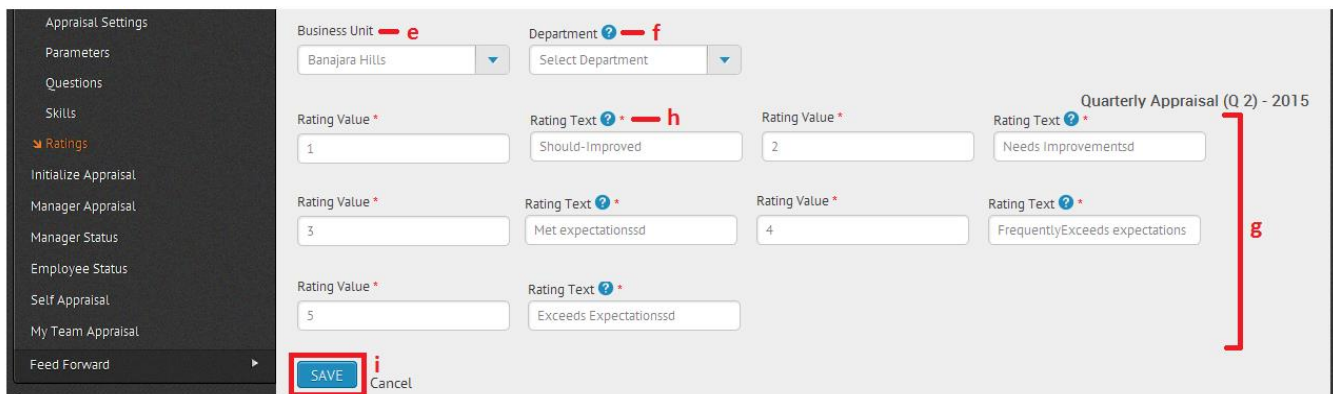


Figure 10

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 employees
 - Ratings : The ratings configured in appraisal setting for a business unit or department will be auto-populated
- a. Click on Performance Appraisal in the header
 - b. Click on Initialize Appraisal in the left side panel
 - c. Click on Add in the right side panel

Refer Figure 11

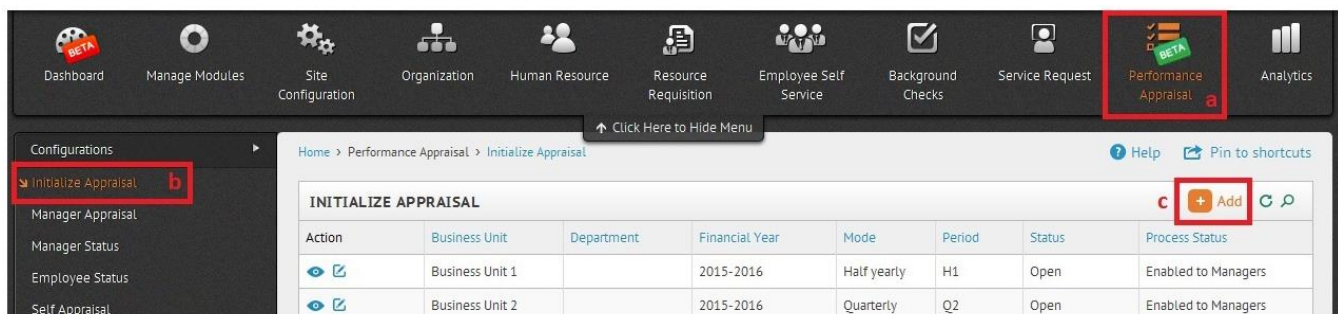
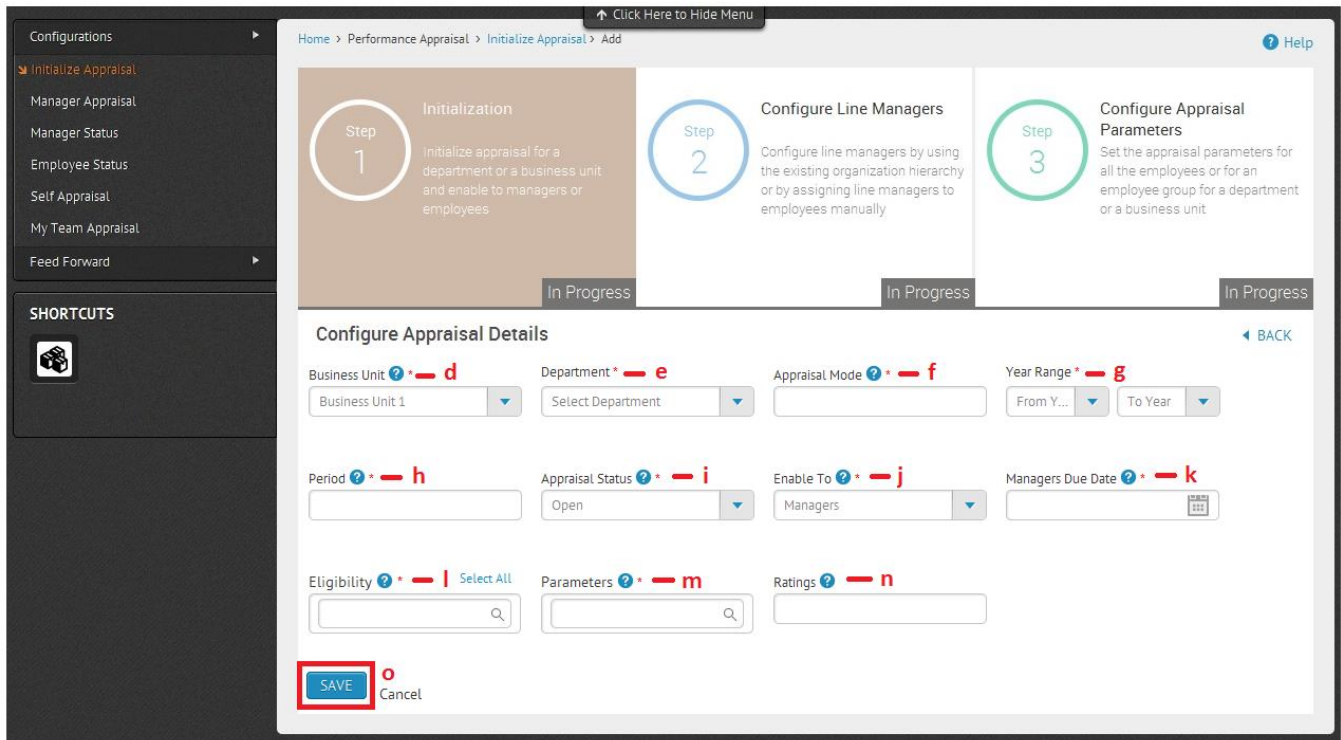


Figure 11

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 12



Home > Performance Appraisal > Initialize Appraisal > Add

Click Here to Hide Menu

Help

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

Configure Appraisal Details

Business Unit **d** Department **e** Appraisal Mode **f** Year Range **g**

Business Unit 1 Select Department From Y... To Year

Period **h** Appraisal Status **i** Enable To **j** Managers Due Date **k**

Open Managers

Eligibility **l** Select All Parameters **m** Ratings **n**

SAVE Cancel

Figure 12

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
- a. Click on Choose by Organization Hierarchy
- b. Click Yes in the Confirmation alert box

Refer Figure 13

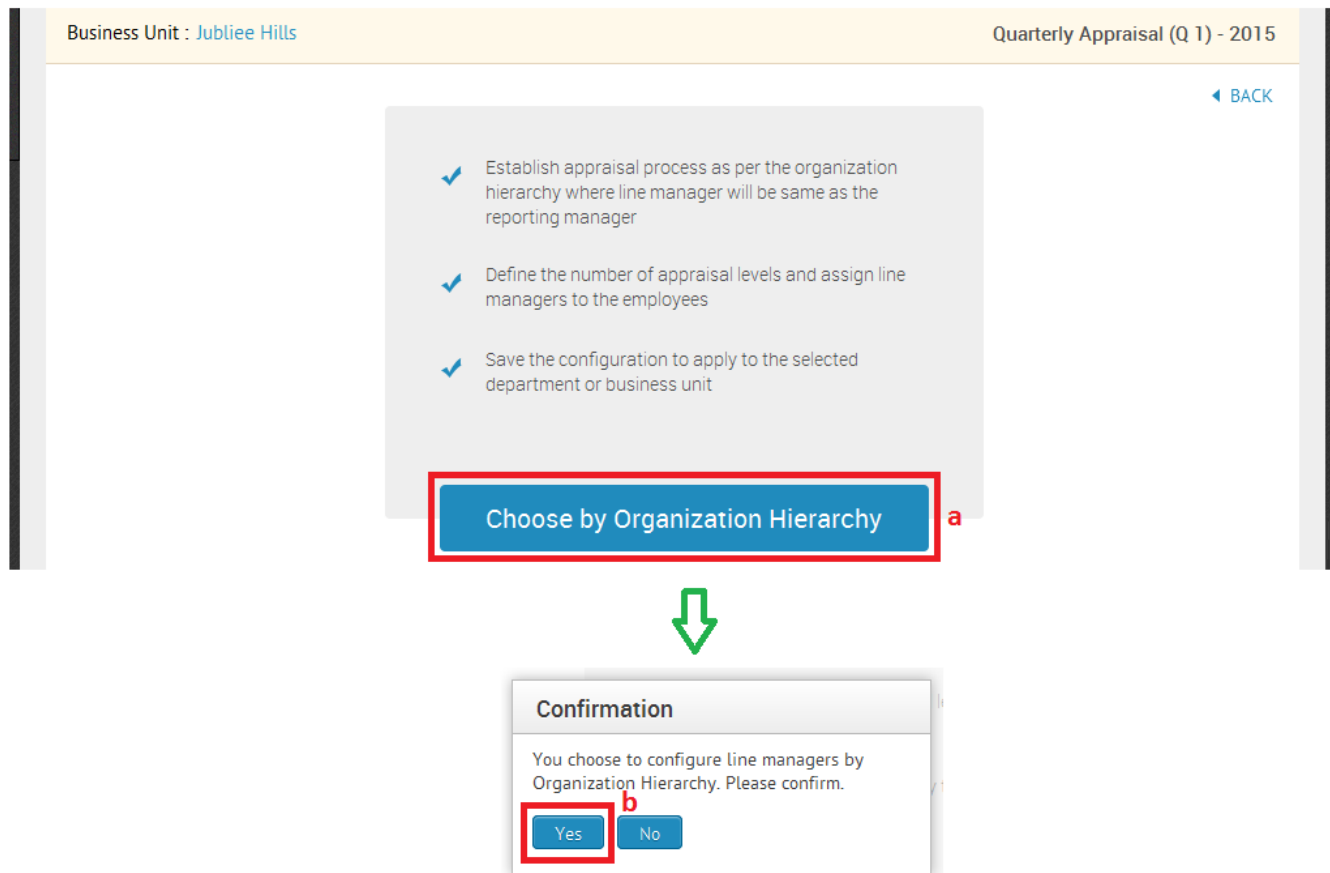
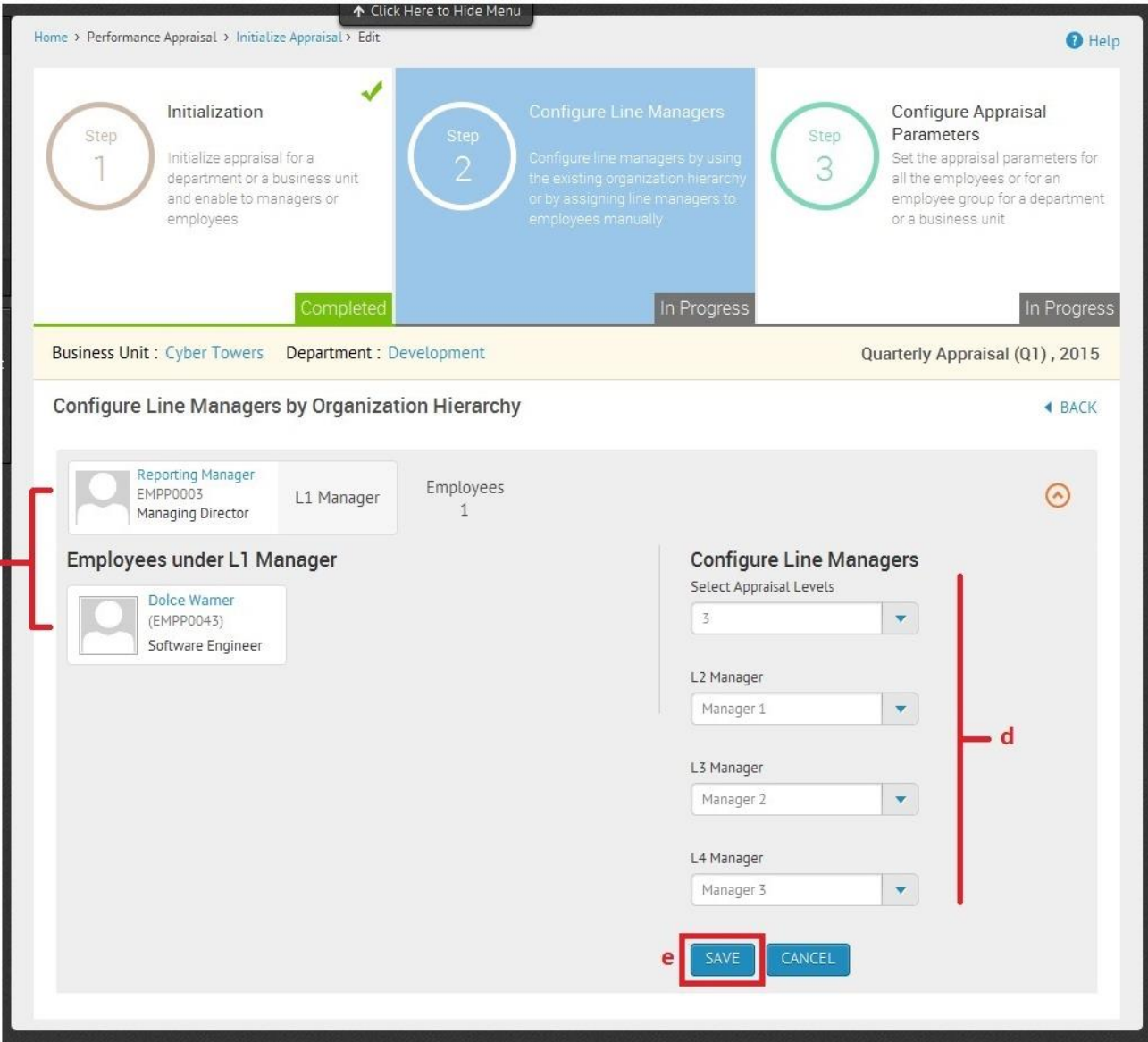


Figure 13

- 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 14



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

Configure Line Managers by Organization Hierarchy

Reporting Manager
EMPP0003
Managing Director

L1 Manager

Employees
1

Employees under L1 Manager

Dolce Warner
(EMPP0043)
Software Engineer

Configure Line Managers

Select Appraisal Levels
3

L2 Manager
Manager 1

L3 Manager
Manager 2

L4 Manager
Manager 3

SAVE CANCEL

Figure 14

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

- a. Click on Assign Line Managers to Employees
- b. Click Yes in the Confirmation alert box

Refer Figure 15

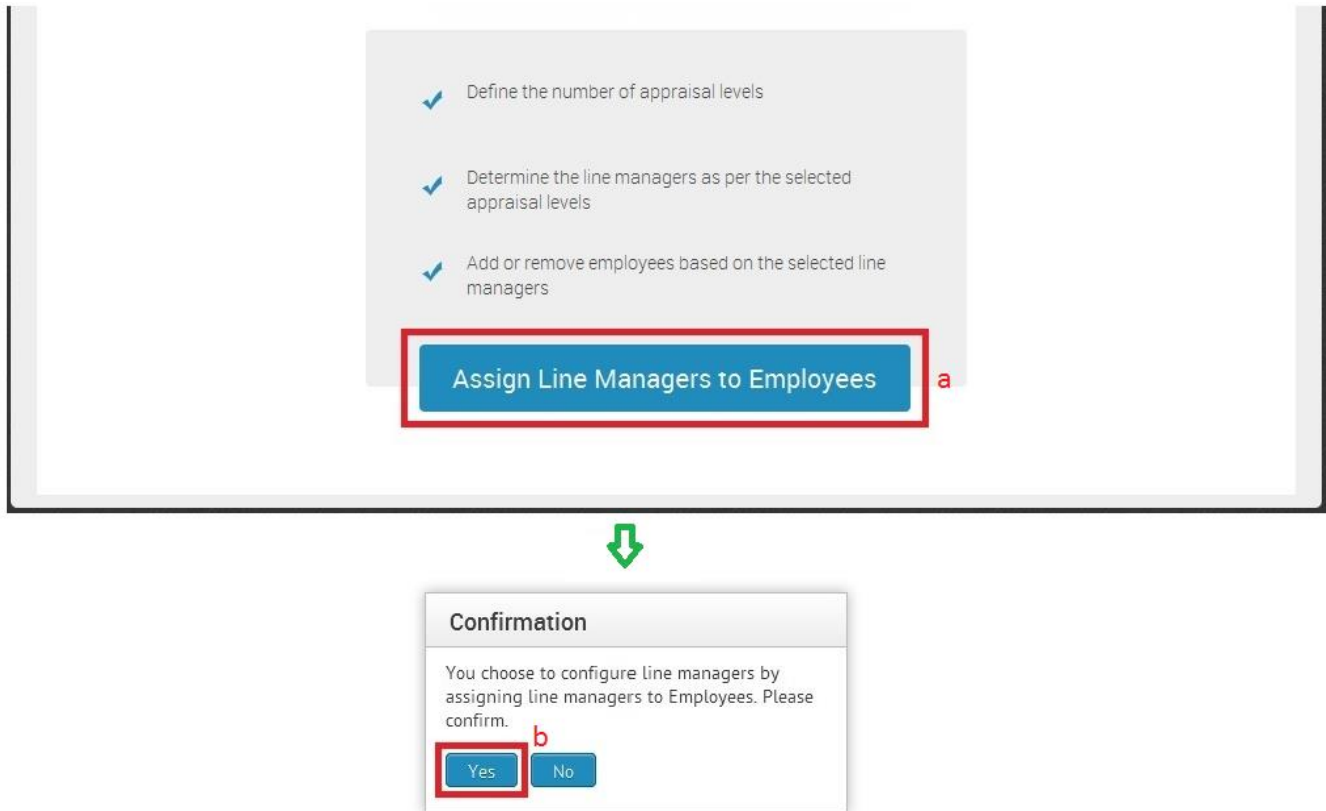
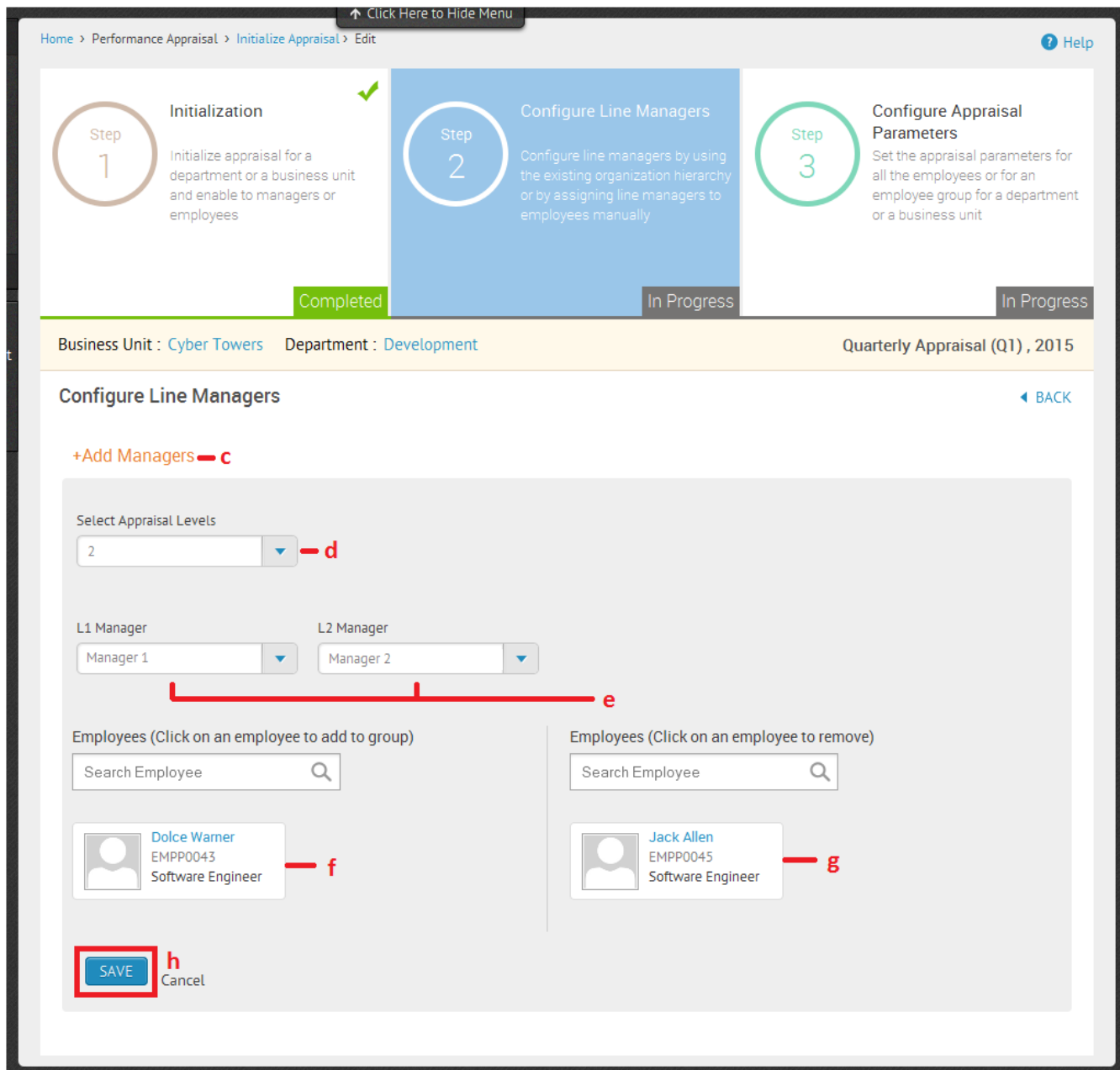


Figure 15

- c. Click on Add Managers link
- 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 16



Home > Performance Appraisal > Initialize Appraisal > Edit

Click Here to Hide Menu

Help

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

Step 2 Configure Line Managers In Progress
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 : Cyber Towers Department : Development Quarterly Appraisal (Q1) , 2015

Configure Line Managers [BACK](#)

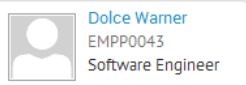
[+Add Managers](#) — c

Select Appraisal Levels
2 — d

L1 Manager L2 Manager
Manager 1 Manager 2 — e

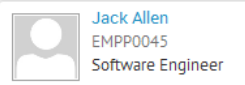
Employees (Click on an employee to add to group)

Search Employee

 — f

Employees (Click on an employee to remove)

Search Employee

 — g

SAVE h Cancel

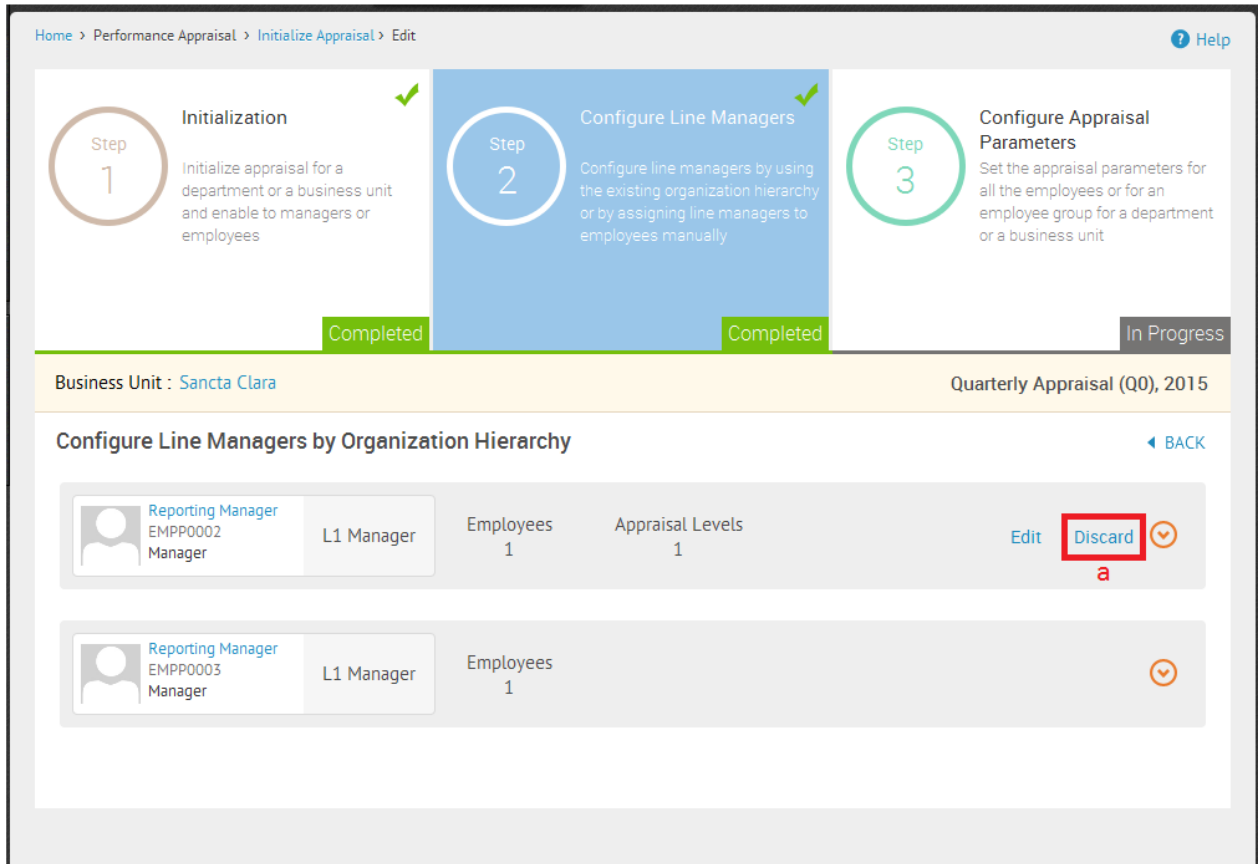
Figure 16

Discard Line Manager Configuration

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

- a. Click on Discard to discard the line manager configurations

Refer Figure 17



OR

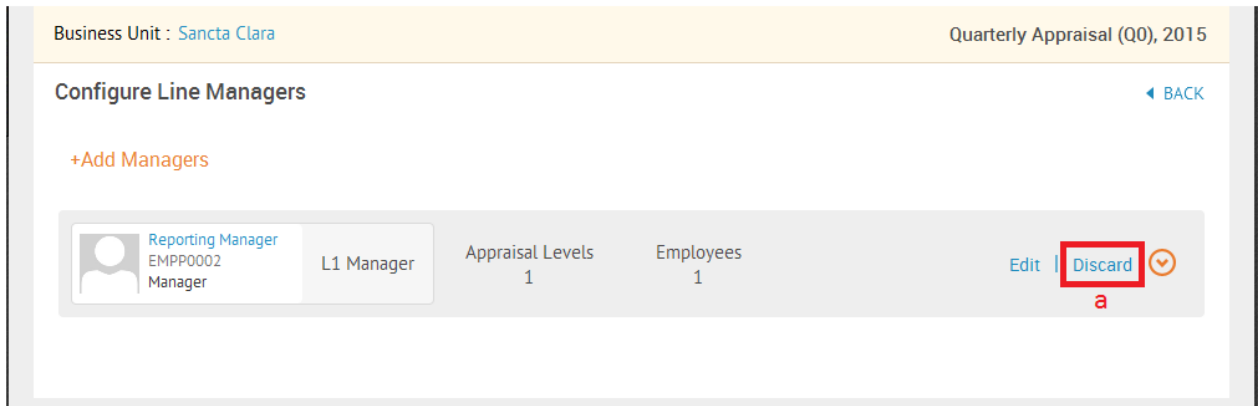


Figure 17

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 Assign Line Managers to Employees
- b. Click Yes in the Confirmation alert box

Refer Figure 18

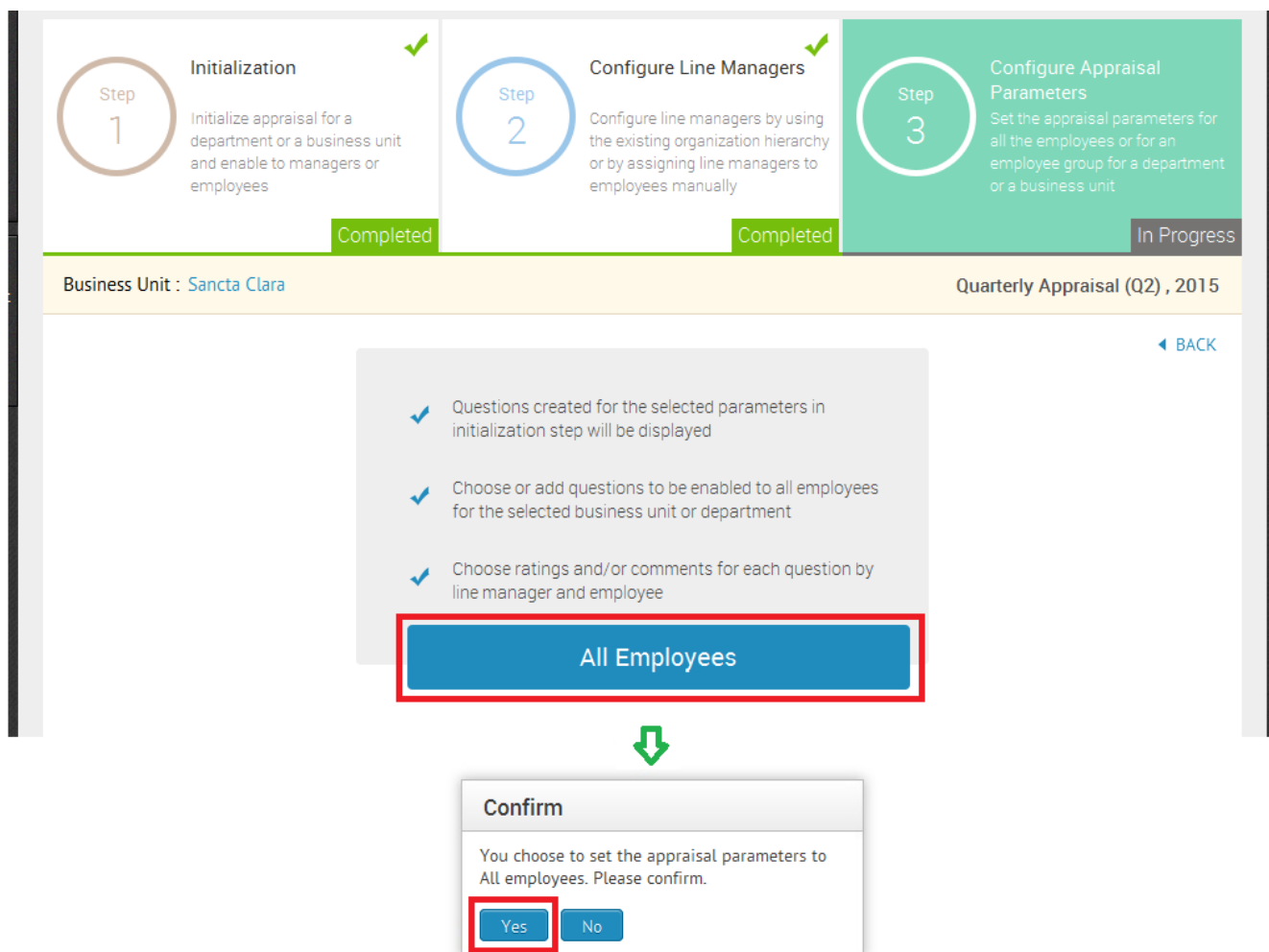
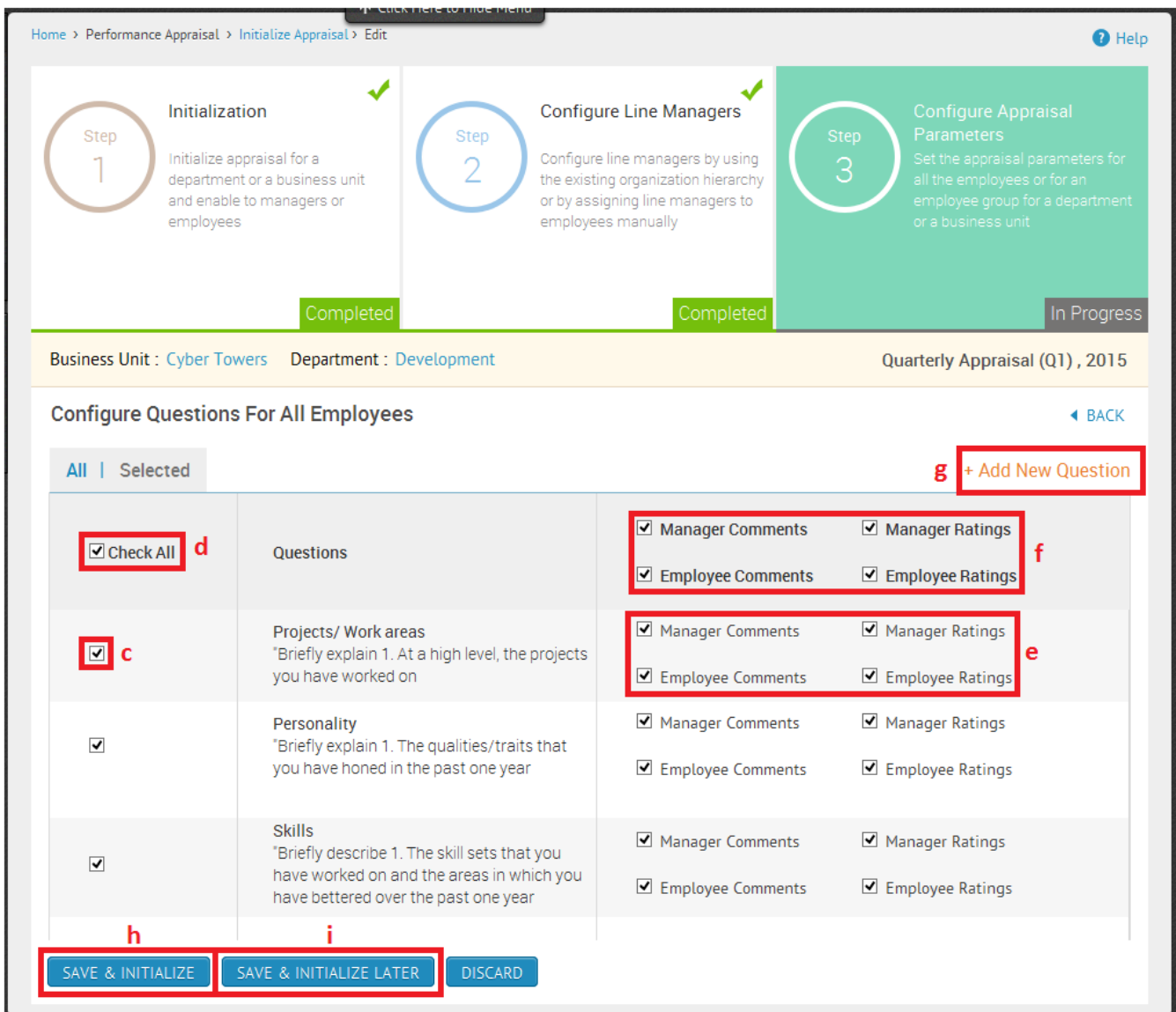


Figure 18

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

Refer Figure 19



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

Configure Questions For All Employees BACK

All | Selected
g + Add New Question

	Questions			
<input checked="" type="checkbox"/> d	<input checked="" type="checkbox"/> Check All	<input checked="" type="checkbox"/> Manager Comments	<input checked="" type="checkbox"/> Manager Ratings	f
		<input checked="" type="checkbox"/> Employee Comments	<input checked="" type="checkbox"/> Employee Ratings	
<input checked="" type="checkbox"/> c	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	e
		<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	

h SAVE & INITIALIZE
i SAVE & INITIALIZE LATER
DISCARD

Figure 19

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

- a. Click on Customized Employees Groups
- b. Click Yes in the Confirmation alert box

Refer Figure 20

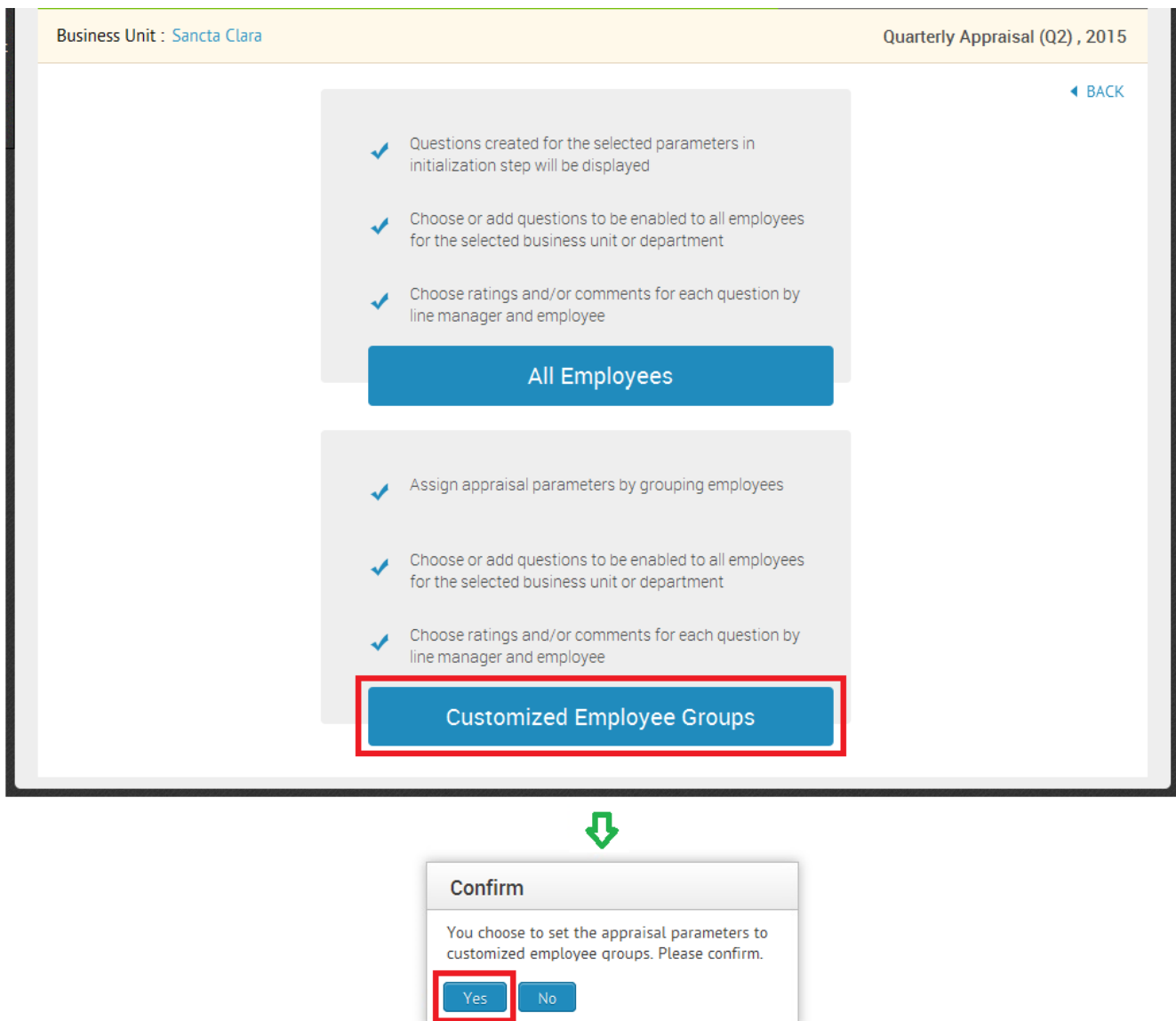


Figure 20

- 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 21

Business Unit : Cyber Towers
 Department : Development

Quarterly Appraisal (Q1) , 2015

Customized Employee Groups


CREATE NEW GROUP

DISCARD

Group Name *

Employees

Search Employee



Dolce Warner
 (EMPP0043)
 Software Engineer

Selected Employees (0)

Search Employee

Add employees to group.

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"/>	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 <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

Close

Figure 21

- 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 22

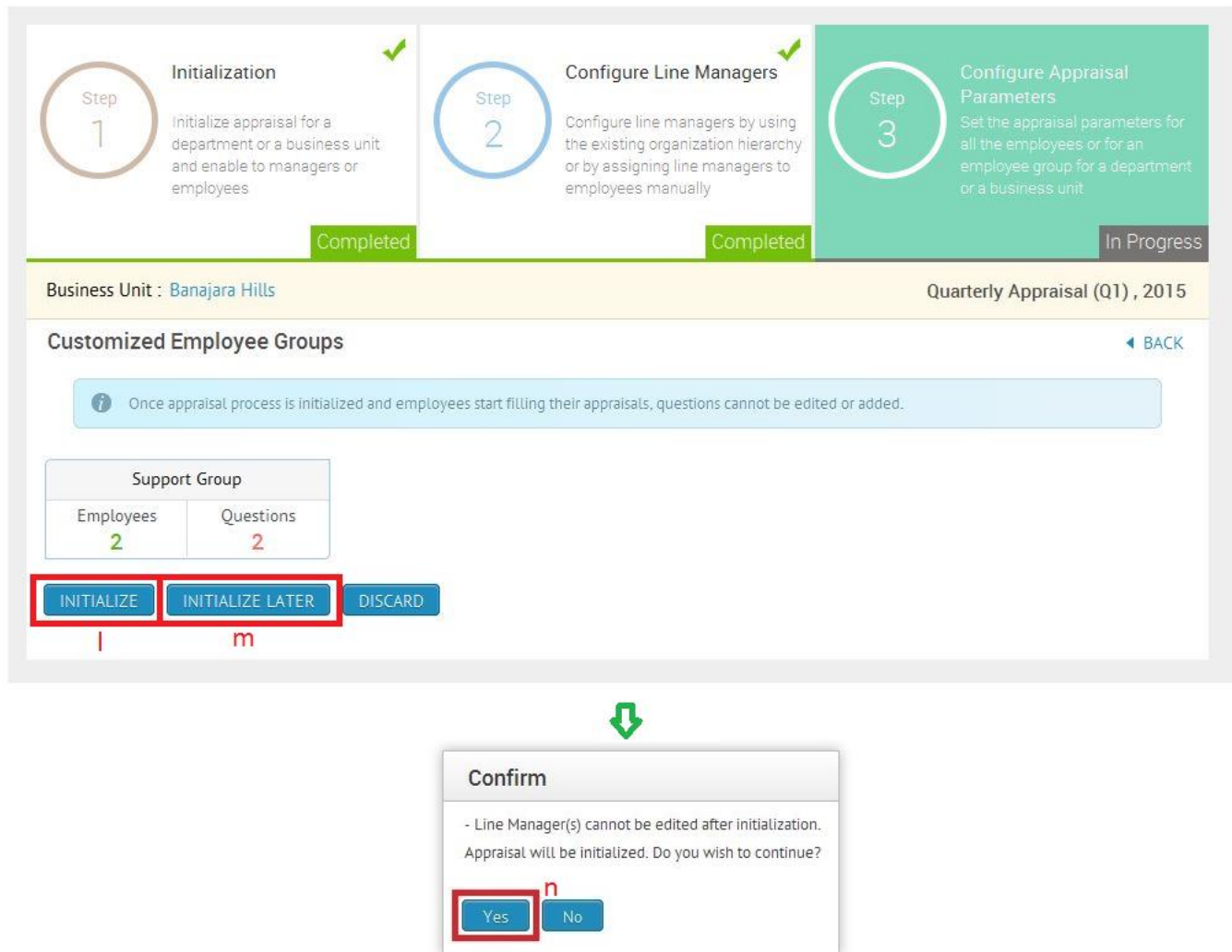


Figure 22

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”.

- a. Login as a manager
- b. Click on Performance Appraisal in the header
- c. Click on Manager Appraisal in the left side menu
- d. Click on edit icon with respect to an appraisal process

Refer Figure 23

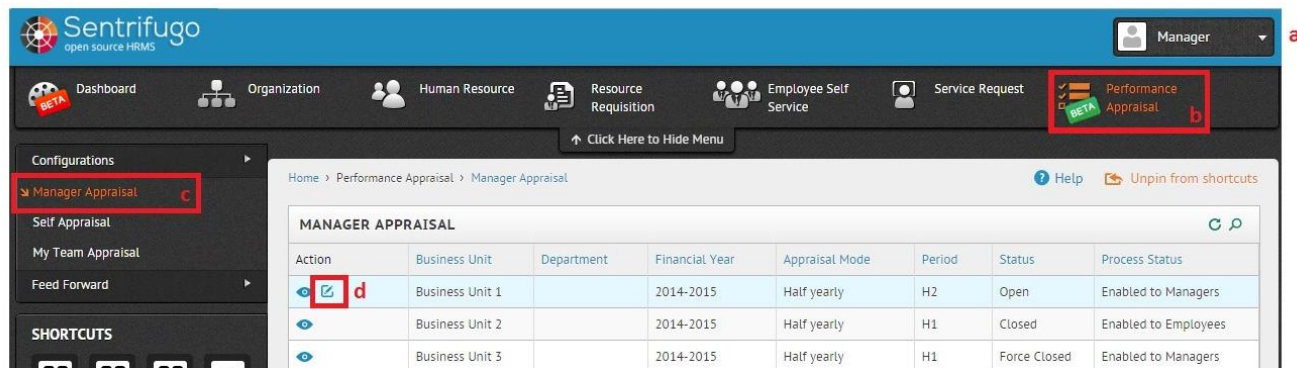


Figure 23

- e. Create new group (E.g., Support, Testing, Development, etc.)
- f. Add employees to the group by clicking on an employee
- g. Click on Add New Question to add questions for a particular group of employees
- h. Select Questions individually by checking the checkbox respective to each question
Or
- i. Select all the questions by checking the Check All option in the table header
- j. 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

Refer Figure 24

Initialization Details

◀ BACK

Business Unit	Jublee 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

Search Employee

Employee 1
(EMPP0029)
Software Engineer

Selected Employees (0)

Search Employee

Employee 8
(EMPP0029)
Software Engineer

Configure Appraisal Parameters for All Employees

All | Selected
+ Add New Question

	Questions	
<input checked="" type="checkbox"/> Check All		<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

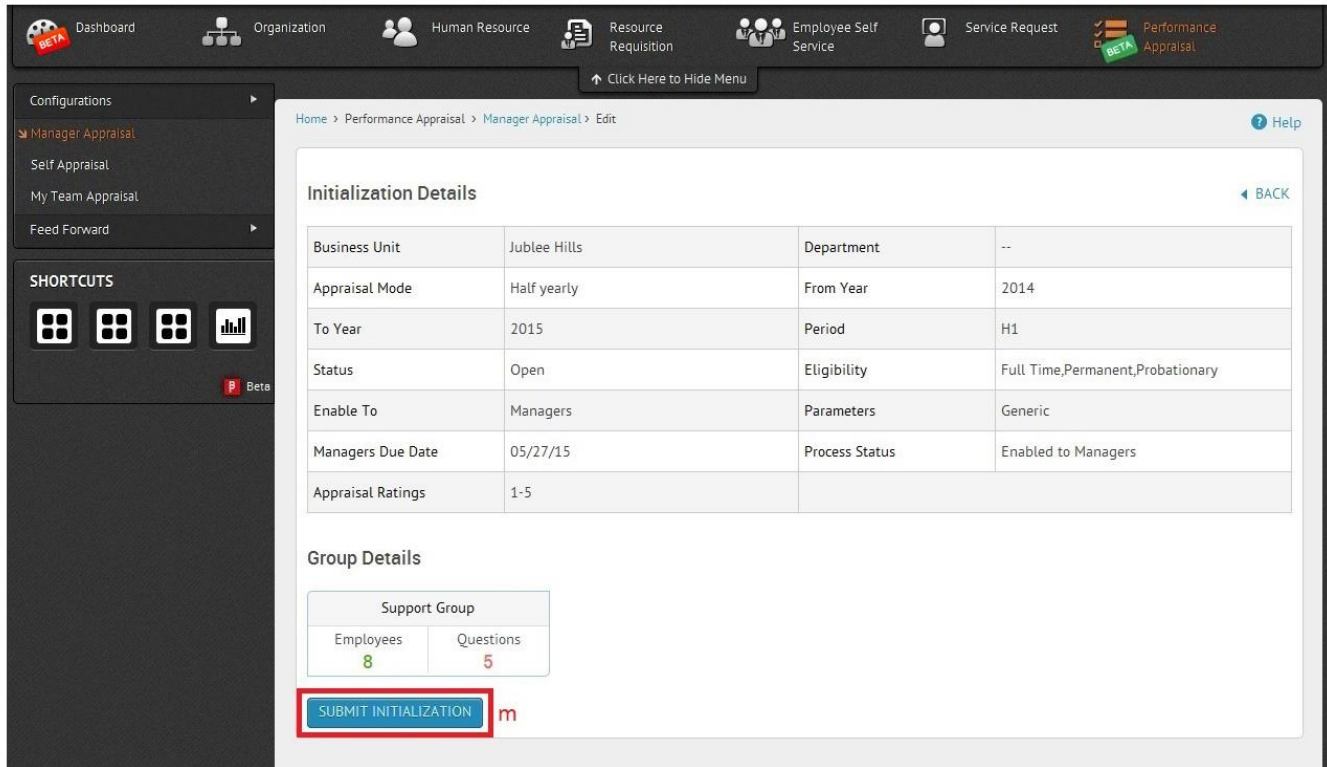
SAVE | Close

Figure 24

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

- m. Click on Submit Initialization

Refer Figure 25



Home > Performance Appraisal > Manager Appraisal > Edit

Initialization Details

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

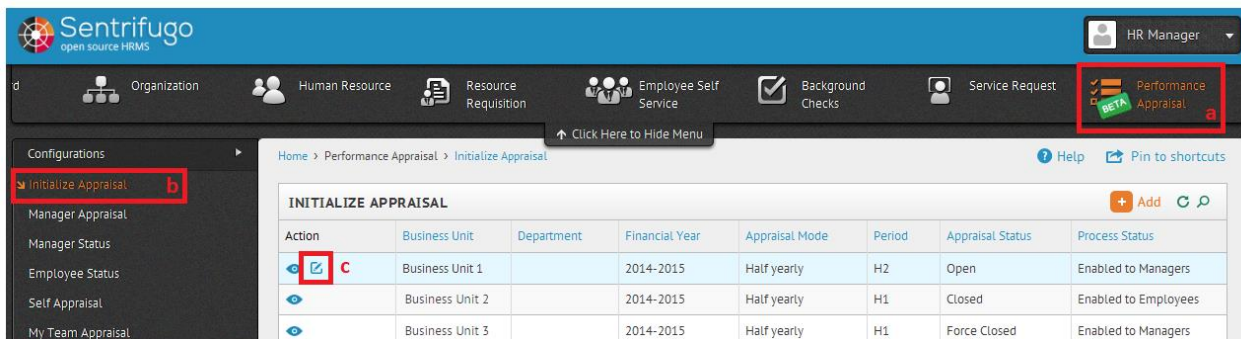
SUBMIT INITIALIZATION m

Figure 25

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.

- a. Click on Performance Appraisal in the header
- b. Click on Initialize Appraisal in the left side menu
- c. Click on edit icon with respect to an appraisal process

Refer Figure 26



Home > Performance Appraisal > Initialize Appraisal

INITIALIZE APPRAISAL




Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
 c	Business Unit 1		2014-2015	Half yearly	H2	Open	Enabled to Managers
	Business Unit 2		2014-2015	Half yearly	H1	Closed	Enabled to Employees
	Business Unit 3		2014-2015	Half yearly	H1	Force Closed	Enabled to Managers

Figure 26

- 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

Refer Figure 27

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"/> - d	Employee Due Date	<input type="text" value="05/29/15"/> - e
Appraisal Ratings	1-5		

UPDATE

f
Cancel

Figure 27

Manager Status

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

- Click on Performance Appraisal in the header
- Click on Manager Status in the left side menu
- Select the Business Unit
- Select the Department
- Select the Manager Appraisal Status if required
- Managers and their status will be displayed

Refer Figure 28

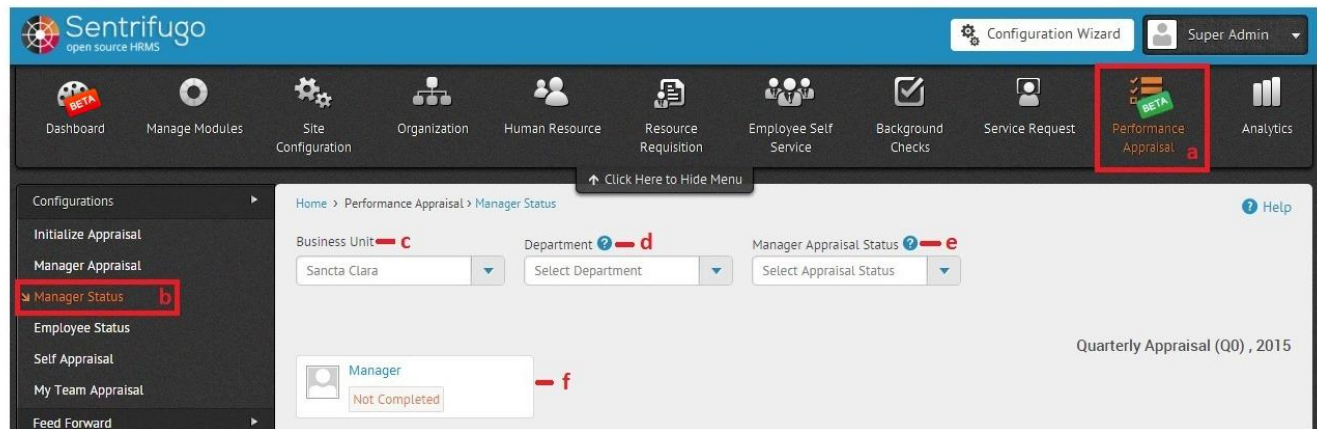


Figure 28

Employee Status

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

- Click on Performance Appraisal in the header
- Click on Employee Status in the left side menu
- Select the Business Unit
- Select the Department
- Select Appraisal Status if required
- Employees and their appraisal status will be displayed

Refer Figure 29

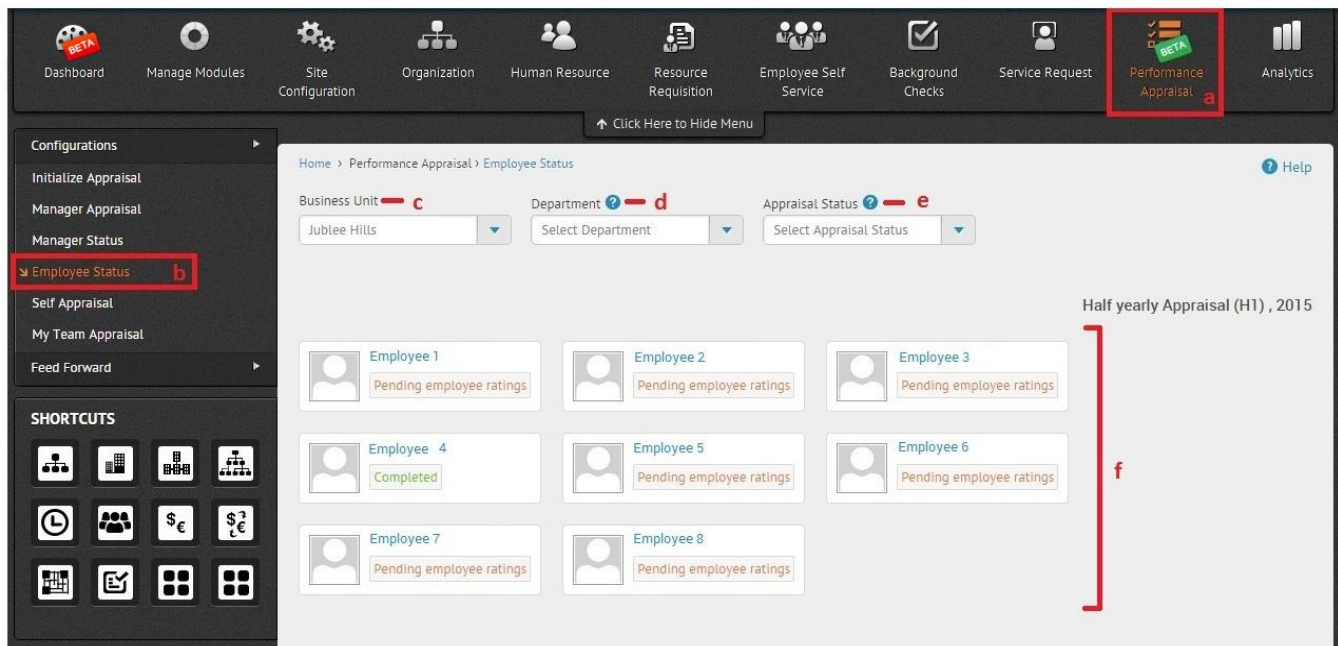


Figure 29

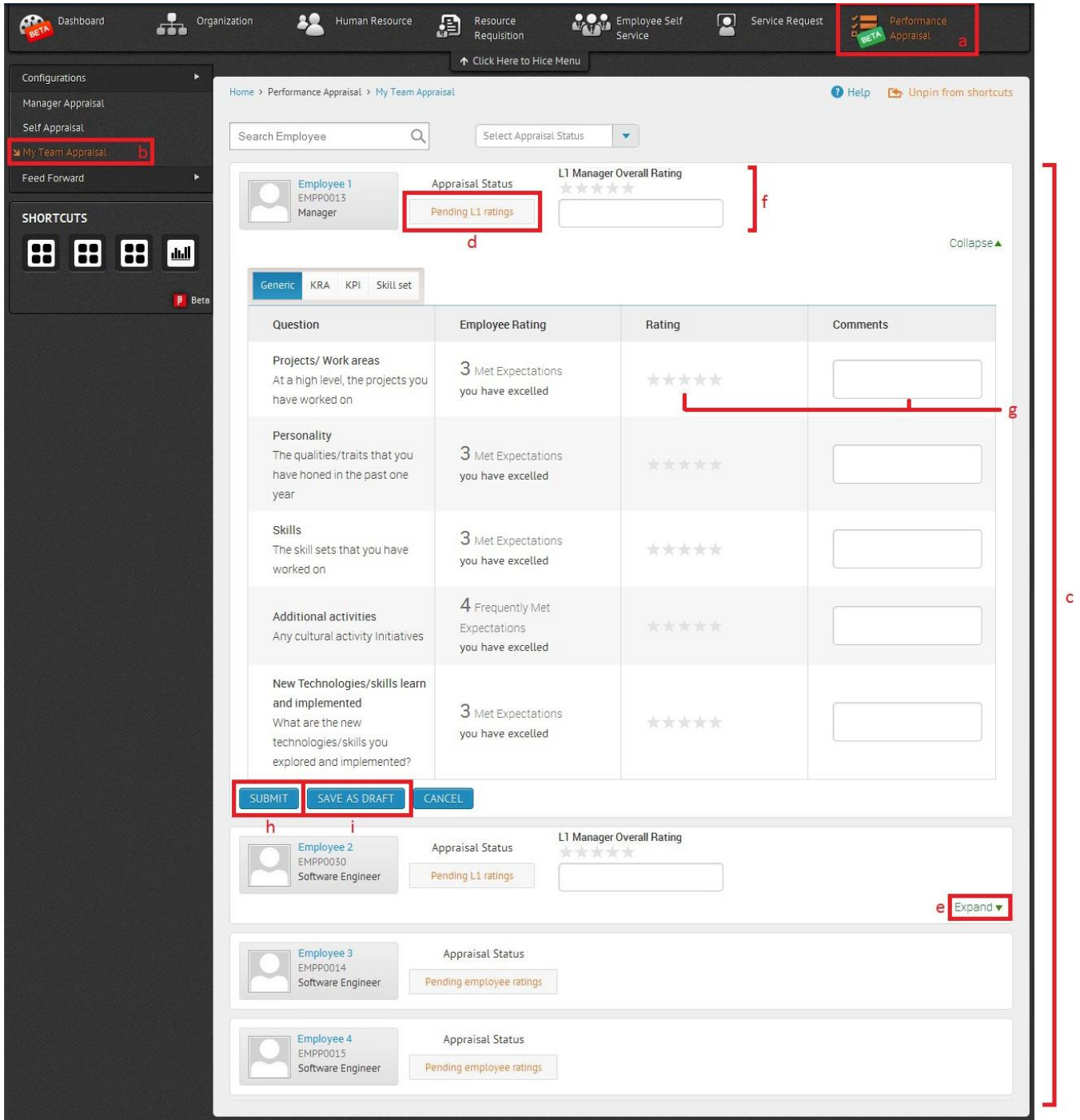
My Team Appraisal

Managers will be able to view their team employees' appraisal status. Once the employees complete 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.

- Click on Performance Appraisal in the header
- Click on My Team Appraisal in the left side menu
- All the employees in the manager's team will be displayed
- The status of each employee's appraisal is displayed
- Click on Expand to provide Manager's rating
- Provide overall rating and comment for an employee
- 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 30



Dashboard Organization Human Resource Resource Requisition Employee Self Service Service Request Performance Appraisal **a**

Click Here to Hide Menu

Home > Performance Appraisal > My Team Appraisal Help Unpin from shortcuts

Search Employee Select Appraisal Status

Employee 1
EMPP0013
Manager

Appraisal Status Pending L1 ratings **d**

L1 Manager Overall Rating **f**

Generic KRA KPI Skill set

Question	Employee Rating	Rating	Comments
Projects/ Work areas At a high level, the projects you have worked on	3 Met Expectations you have excelled	★★★★★	g
Personality The qualities/traits that you have honed in the past one year	3 Met Expectations you have excelled	★★★★★	
Skills The skill sets that you have worked on	3 Met Expectations you have excelled	★★★★★	
Additional activities Any cultural activity initiatives	4 Frequently Met Expectations you have excelled	★★★★★	
New Technologies/skills learn and implemented What are the new technologies/skills you explored and implemented?	3 Met Expectations you have excelled	★★★★★	

h **i** SUBMIT SAVE AS DRAFT CANCEL

Employee 2
EMPP0030
Software Engineer

Appraisal Status Pending L1 ratings

L1 Manager Overall Rating

e Expand

Employee 3
EMPP0014
Software Engineer

Appraisal Status Pending employee ratings

Employee 4
EMPP0015
Software Engineer

Appraisal Status Pending employee ratings

Figure 30

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

- Click on Performance Appraisal in the header
- Click on Self Appraisal in the left side menu
- 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

Refer Figure 31

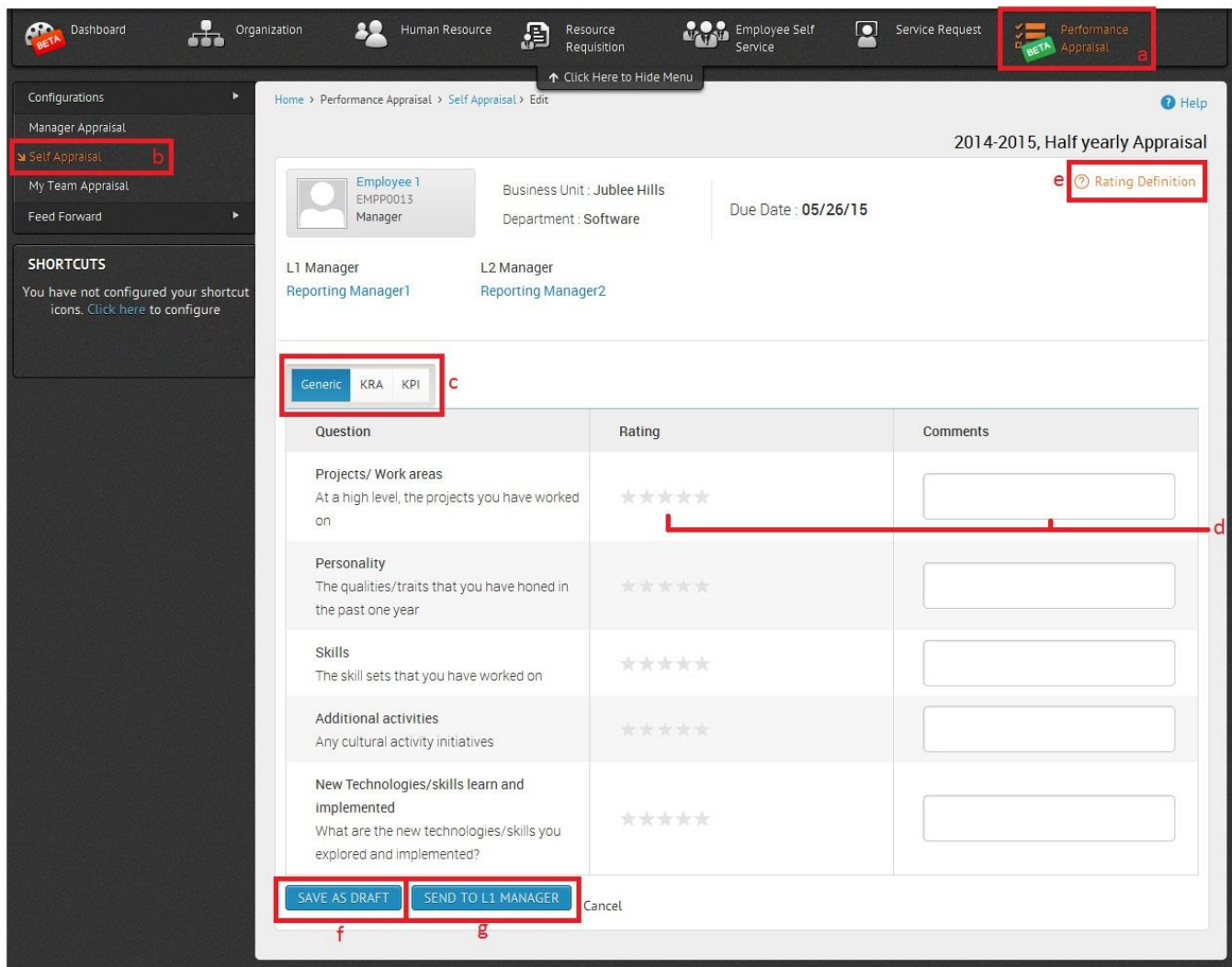


Figure 31

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.

- Click on Performance Appraisal in the header
- Click on Feed Forward in the left side menu
- Click on Question in the submenu links
- Click on Add in the right side grid

Refer Figure 32

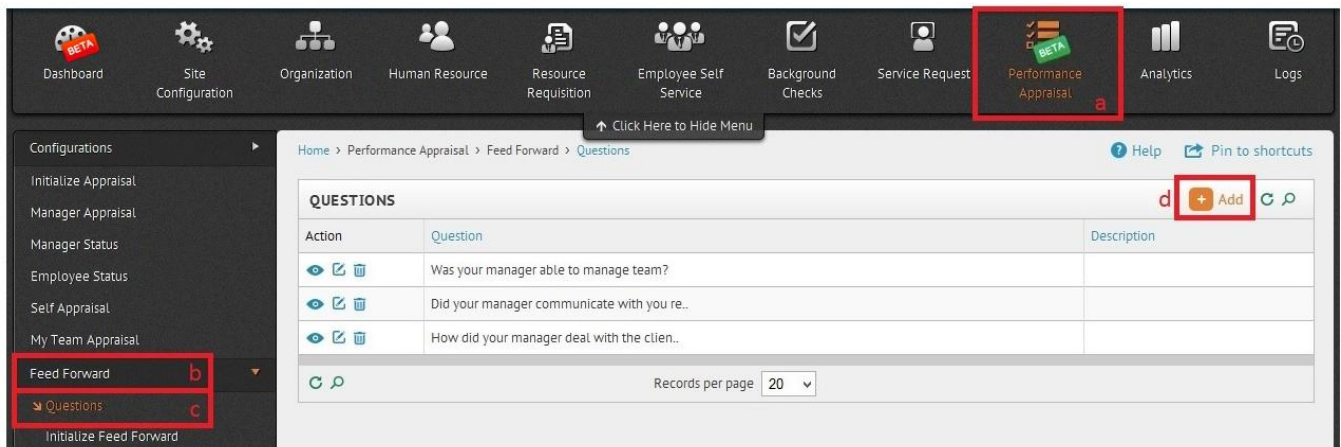


Figure 32

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

Refer Figure 33

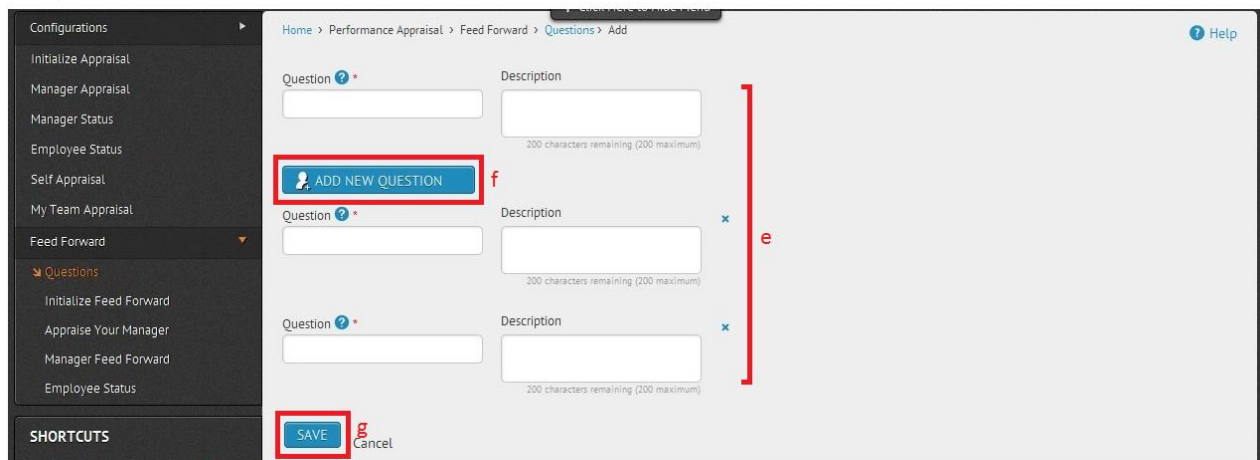


Figure 33

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

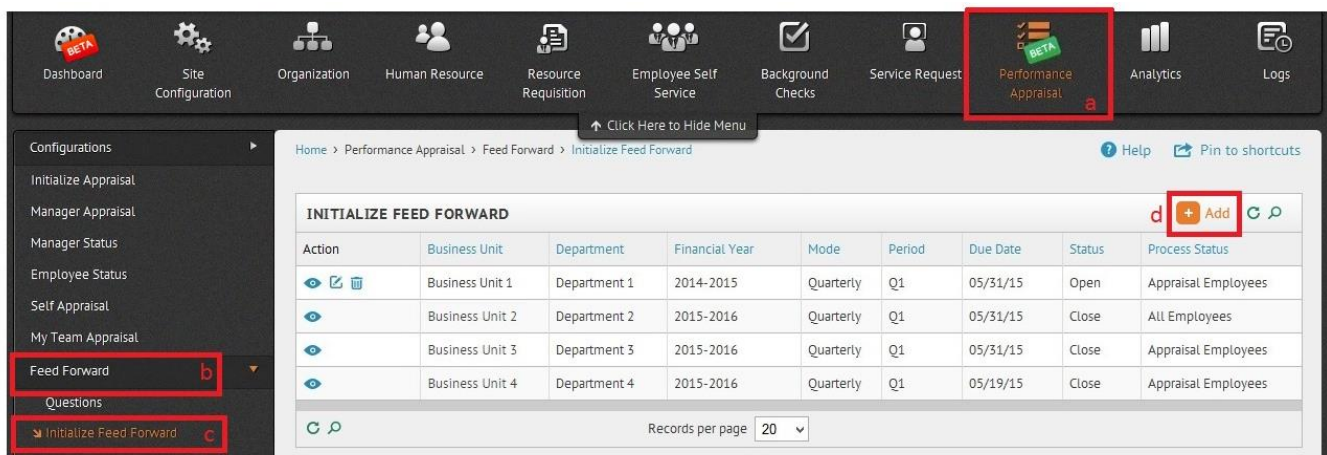
All Employees: All the employees in the organization can appraise their managers

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.







- Click on Performance Appraisal in the header
- Click on Feed Forward in the left side menu
- Click on Initialize Feed Forward in the submenu links
- Click on Add in the right side grid

Refer Figure 34



Home > Performance Appraisal > Feed Forward > Initialize Feed Forward

INITIALIZE FEED FORWARD

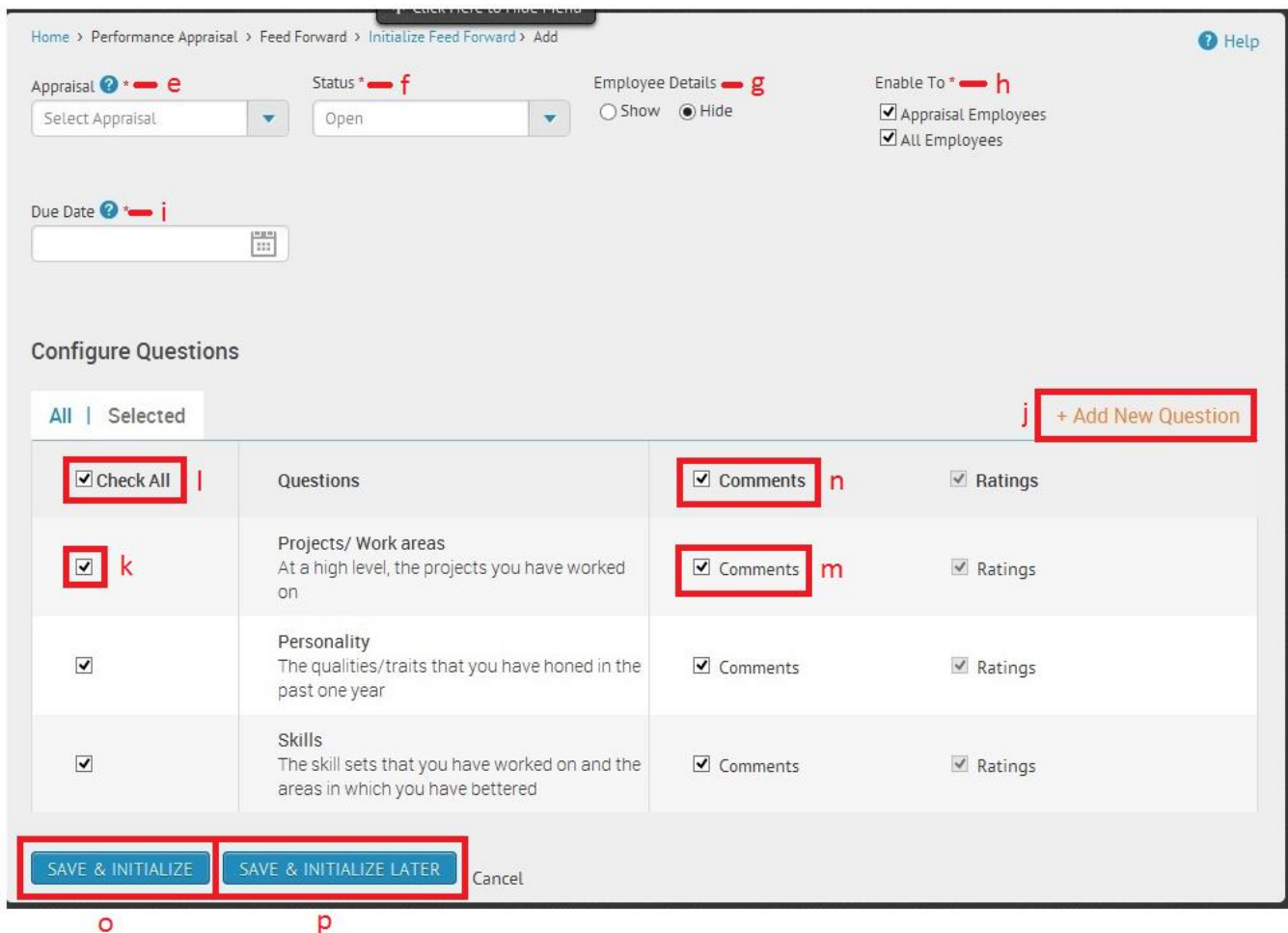
Action	Business Unit	Department	Financial Year	Mode	Period	Due Date	Status	Process Status
  	Business Unit 1	Department 1	2014-2015	Quarterly	Q1	05/31/15	Open	Appraisal Employees
	Business Unit 2	Department 2	2015-2016	Quarterly	Q1	05/31/15	Close	All Employees
	Business Unit 3	Department 3	2015-2016	Quarterly	Q1	05/31/15	Close	Appraisal Employees
	Business Unit 4	Department 4	2015-2016	Quarterly	Q1	05/19/15	Close	Appraisal Employees

Records per page 20

Figure 34

- e. Select an appraisal process from the Appraisal dropdown
- f. The Status will be by default selected as Open
- g. Define whether or not you want to view the employee details along with their feedback ratings and comments
- h. Enable Feed Forward to all employees or only to employees who are eligible for Appraisal process
- i. Pick a date for employees to provide their feedback
- j. Click on Add New Question to add questions for Feed Forward
- k. 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

Refer Figure 35



Home > Performance Appraisal > Feed Forward > Initialize Feed Forward > Add

Appraisal **e** Status **f** Employee Details **g** Enable To **h**

Select Appraisal: [dropdown] Open [dropdown] ☐ Show ☒ Hide

Due Date **i** [calendar icon]

☒ Appraisal Employees
☒ All Employees

Configure Questions

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

<input checked="" type="checkbox"/> Check All l	Questions	<input checked="" type="checkbox"/> Comments n	<input checked="" type="checkbox"/> Ratings
<input checked="" type="checkbox"/> k	Projects/ Work areas At a high level, the projects you have worked on	<input checked="" type="checkbox"/> Comments m	<input checked="" type="checkbox"/> Ratings
<input checked="" type="checkbox"/>	Personality The qualities/traits that you have honed in the past one year	<input checked="" type="checkbox"/> Comments	<input checked="" type="checkbox"/> Ratings
<input checked="" type="checkbox"/>	Skills The skill sets that you have worked on and the areas in which you have bettered	<input checked="" type="checkbox"/> Comments	<input checked="" type="checkbox"/> Ratings

o SAVE & INITIALIZE **p** SAVE & INITIALIZE LATER Cancel

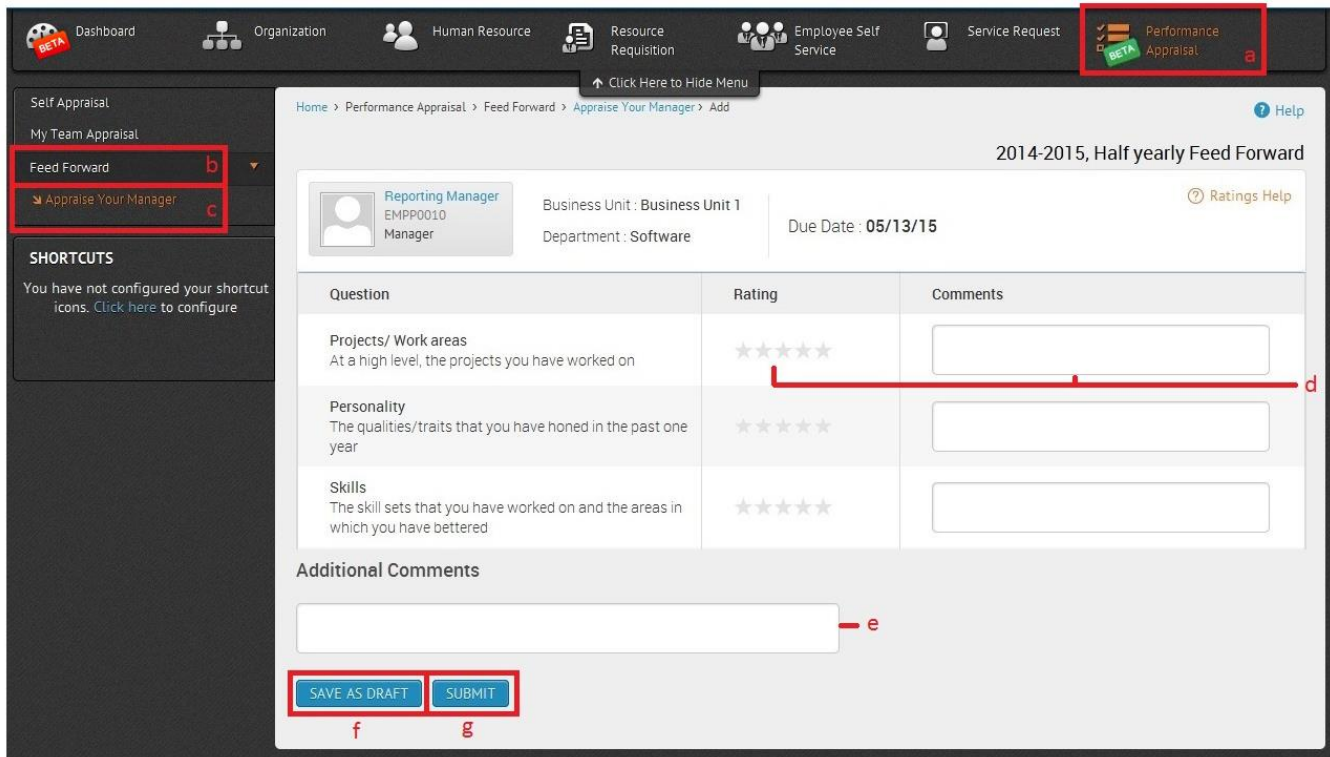
Figure 35

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.

- Click on Performance Appraisal in the header
- Click on Feed Forward in the left side menu
- Click on Appraise Your Manager in the submenu links
- Provide ratings and comments
- Enter additional comments (not mandatory)
- Click on Save as Draft to save Feed Forward
- Click on Submit to submit Feed Forward

Refer Figure 36



The screenshot displays the 'Appraise Your Manager' form within the Sentrifugo HRMS. The top navigation bar includes links for Dashboard, Organization, Human Resource, Resource Requisition, Employee Self Service, Service Request, and Performance Appraisal (highlighted with a red box and label 'a'). The left sidebar menu shows 'Self Appraisal', 'My Team Appraisal', 'Feed Forward' (highlighted with a red box and label 'b'), and 'Appraise Your Manager' (highlighted with a red box and label 'c'). The main content area is titled '2014-2015, Half yearly Feed Forward' and includes a 'Reporting Manager' section with a profile picture, name (EMPP0010 Manager), business unit (Business Unit 1), department (Software), and due date (05/13/15). Below this is a table with three columns: Question, Rating, and Comments. The table contains three rows of questions: 'Projects/ Work areas', 'Personality', and 'Skills', each with a five-star rating and a text input field for comments. A red line connects the 'Rating' column to the 'Comments' column for the first row, with a red box and label 'd' at the end. Below the table is an 'Additional Comments' section with a text input field and a red box and label 'e' at the end. At the bottom of the form are two buttons: 'SAVE AS DRAFT' (highlighted with a red box and label 'f') and 'SUBMIT' (highlighted with a red box and label 'g').

Question	Rating	Comments
Projects/ Work areas At a high level, the projects you have worked on	★★★★★	
Personality The qualities/traits that you have honed in the past one year	★★★★★	
Skills The skill sets that you have worked on and the areas in which you have bettered	★★★★★	

Additional Comments

SAVE AS DRAFT SUBMIT

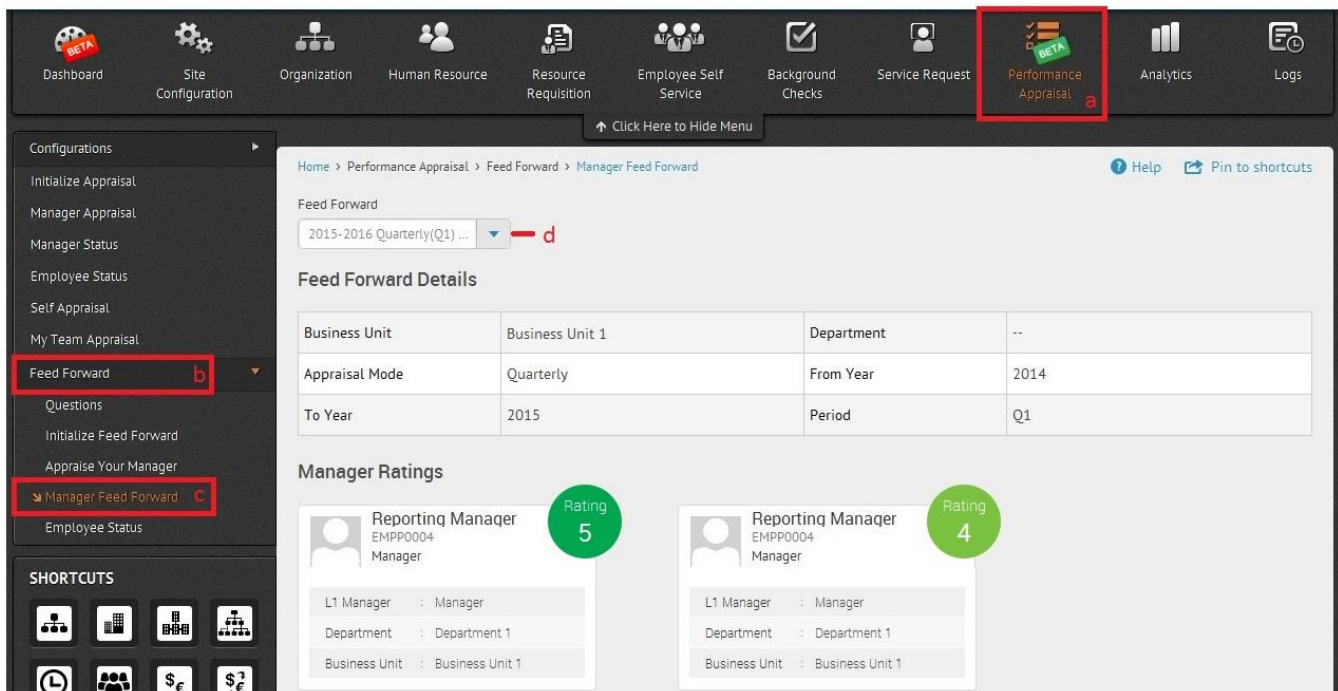
Figure 36

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.

- Click on Performance Appraisal in the header
- Click on Feed Forward in the left side menu
- Click on Appraise Your Manager in the submenu links
- Select a process to Feed Forward details in the dropdown

Refer Figure 37



Home > Performance Appraisal > Feed Forward > Manager Feed Forward

Feed Forward

2015-2016 Quarterly(Q1)...

Feed Forward Details

Business Unit	Business Unit 1	Department	--
Appraisal Mode	Quarterly	From Year	2014
To Year	2015	Period	Q1

Manager Ratings

Reporting Manager
EMPP0004
Manager

Rating 5

L1 Manager : Manager
Department : Department 1
Business Unit : Business Unit 1

Reporting Manager
EMPP0004
Manager

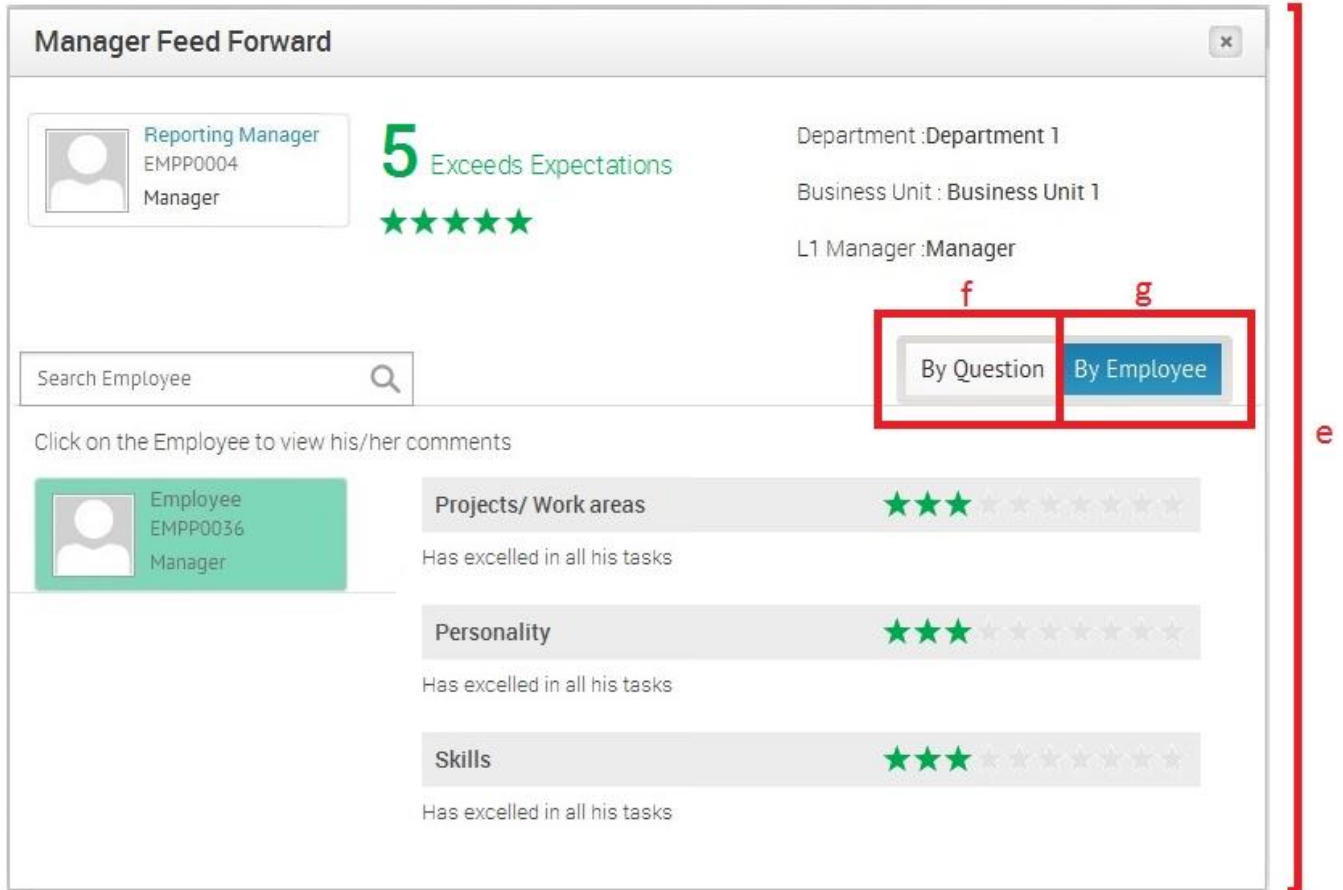
Rating 4

L1 Manager : Manager
Department : Department 1
Business Unit : Business Unit 1

Figure 37

- 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 38



Manager Feed Forward

Reporting Manager
EMPP0004
Manager

5 Exceeds Expectations
★★★★★

Department : Department 1
Business Unit : Business Unit 1
L1 Manager : Manager

Search Employee

Click on the Employee to view his/her comments

Employee
EMPP0036
Manager

Projects/ Work areas ★★★★★
Has excelled in all his tasks

Personality ★★★★★
Has excelled in all his tasks

Skills ★★★★★
Has excelled in all his tasks

By Question By Employee

e

Figure 38

Employee Status

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

- Click on Performance Appraisal in the header
- Click on Feed Forward in the left side menu
- Click on Employee Status in the submenu links
- 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 39

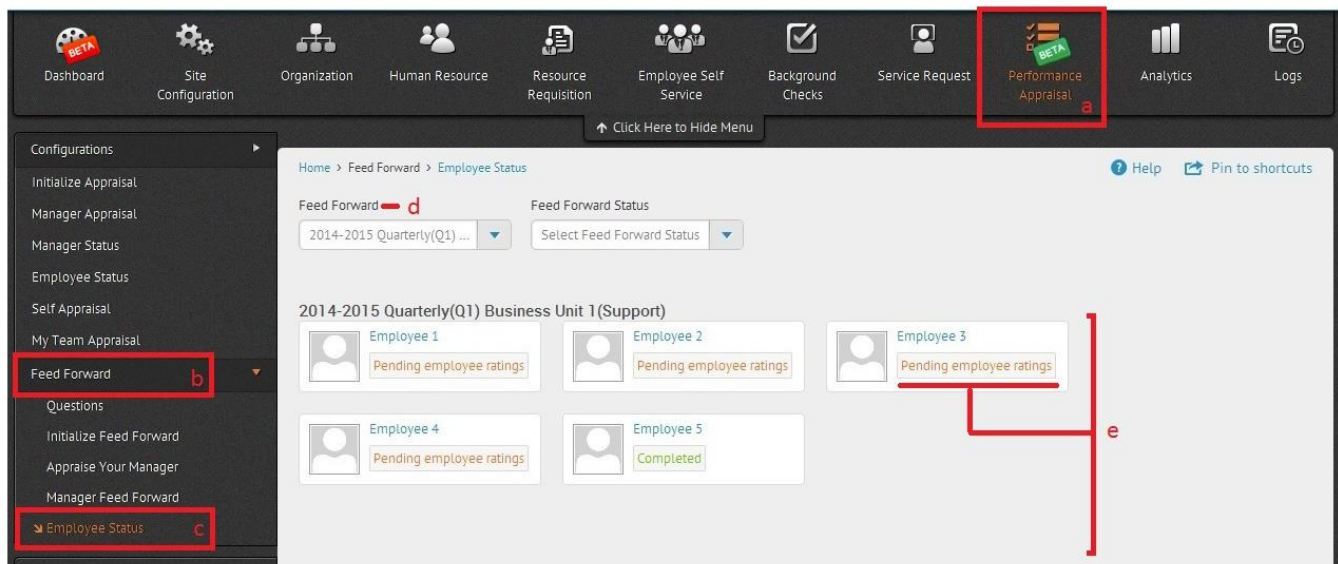


Figure 39