



The Solutions People

MANAGEMENT BY OBJECTIVE (MBO) PROCESS WORKFLOW
DOCUMENT

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1:-What is MBO

- It is a Performance Evaluation & Appraisal System for all Employees

2:- Features of MBO

- MBO is used to improve, previously used, paper based employee appraisal system.
- This will streamline the overall process & will also provide greater visibility for execution of appraisal & evaluation. It also includes :
 - Simplified Targets & Goals
 - Monthly/Quarterly/Yearly Performance Journals
 - Flexible Forms
 - Automated Work flow
 - Automated E-mail Reminders

3:-Purpose of the Document

- This document contains the Description of Process Flow and Workflow of Management By Objective(MBO) Application.

Scope of the Document:-

- This document covers the Process Workflow and Functionalities Detail.

4:-Process Flow

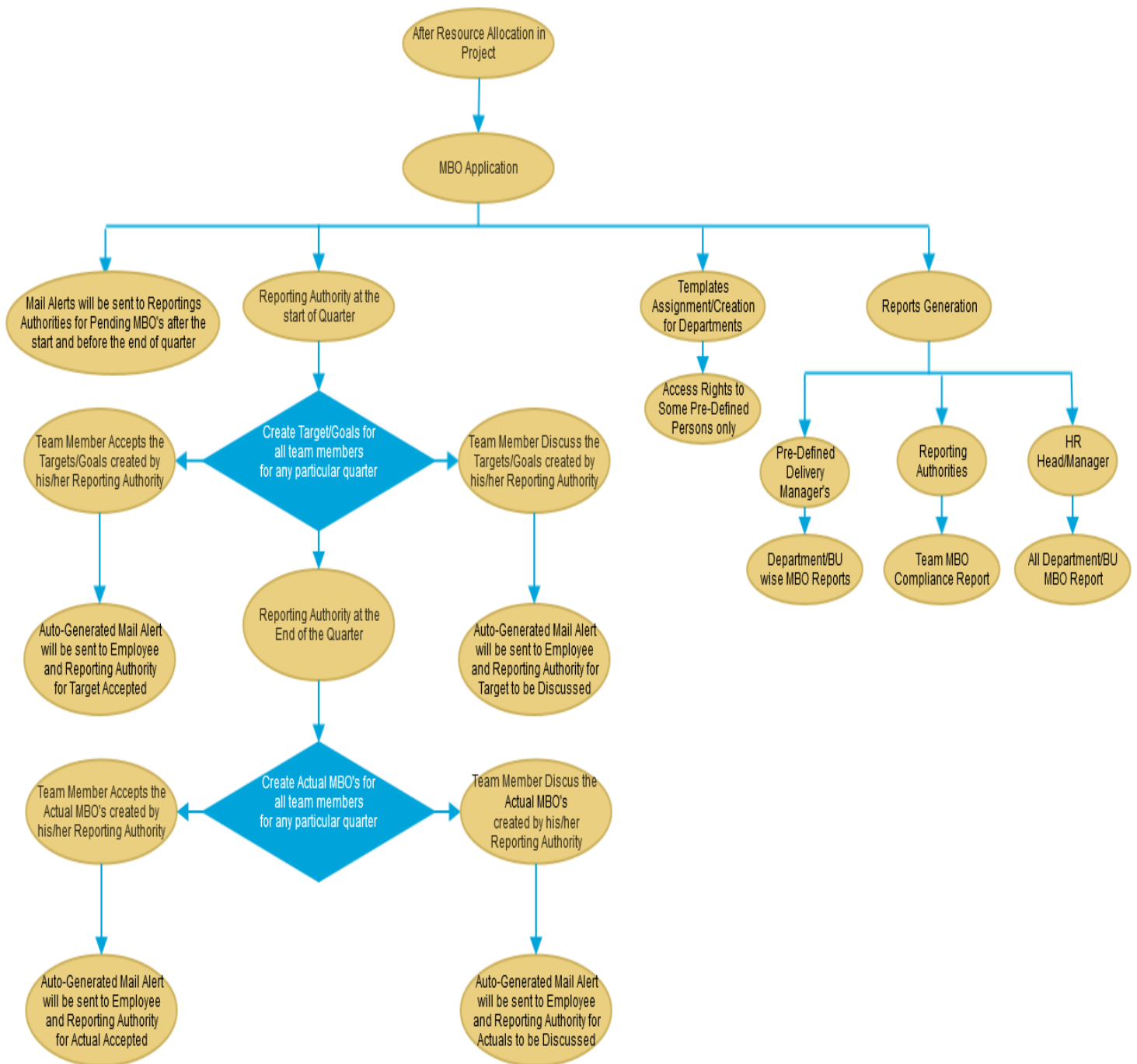
Process Flow



5:- Access Rights And Privileges

Roles	Access Rights and Privileges
Admin	<ul style="list-style-type: none">• This User creates MBO templates(forms) and assign them to various designations and departments• This User can modify MBO application Locking/Unlocking period
Reporting Authority	<ul style="list-style-type: none">• This user has to fill target/achievement values for all his/her subordinates only• He/She may add comments on his/her subordinates' MBOs• He/She may add monthly comments on his/her subordinates' MBOs• He/She may view his/her subordinate's MBO history• He/She may escalate his/her subordinate's MBO to higher Reporting Authority, if required• He/She may update his/her subordinate's MBOs Grades• This user has all the rights as that of an employee (as listed under)
Employee	<ul style="list-style-type: none">• This user has rights to accept/discuss targets/achievements of himself/herself but cannot edit them• He/She may add comments on his/her MBO• He/She may view monthly comments on his/her MBO• He/She may view his/her own MBO history

6:- MBO Workflow Diagram



7:- Reporting Authority and Employee Process At the Start of Quarter

REPORTING AUTHORITY SCREENS

Fill MBO Link(The below screen will be visible to Reporting Authority and Above)

Employee List

Month: Q3 - (Oct - Dec) Year: 2015 Search

Total 9 employees reporting to you in Q3 - (Oct - Dec) - 2015.

No	Name	Designation	Projection	Closure	History	Remarks
1	Gayatri Thakkar	Technical Lead (Level 2)				
2	Gayatri Patel	Senior Engineer (Level 2)				
3	Vishal Jindal	Technical Lead (Level 1)				
4	Hirenkumar Parekh	Technical Lead (Level 2)				
5	Kaushal Kumar	Technical Manager				
6	Jigish Parikh	Technical Lead (Level 2)				
7	Mohamed Rafi Hussain	Contractor				Template not assigned.
8	Harsh Chunara	Technical Lead (Level 1)				
9	Mahipalsinh Vaghela	Senior Engineer (Level 2)				

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Description:-

- Present quarter and year will be pre-selected and the list of your direct subordinates, in that specific quarter, will be loaded
- You can manually select different quarter and year, to view list of your direct subordinates for that specific quarter
- After selecting proper quarter, list of your direct subordinates, in that quarter, will be loaded

Now, in the list, go at the appropriate record and click on Projection icon and you will be able to see the screen as under:

Management by Objectives [MBO]

Welcome Urvish Shah

Employee

Reporting Authority

Fill MBO

Team MBO

Fill Monthly Comments

Monthly Comments Report

Team Compliance Report

Admin

Reports

MBO Creation

Add Soft Factors

Goals: --Select--
Parameters:

Previous Quarter MBO

Add Soft Factors

Name: Gayatri Thakkar
Email: krishna.panchal@einfochips.com
MBO Month: Q3 - (Oct - Dec) 2015

Factor	Goal	Parameter	Project	Target	Actual	Rank	Add	Edit	Delete
Hard Factors (70%)	Gross Margins (10%)	Gross Margins (10%)	All Projects(10%)	90.01 - 99.99			+		
	Self Billing (15%)	Self Billing (15%)	All Projects(15%)	90.01 - 99.99			+		
	Revenue Target (40%)	Revenue Target (40%)	All Projects(40%)	90.01 - 99.99			+		
	Customer Satisfaction (5%)	Customer Satisfaction (5%)	All Projects(5%)	4.01 - 4.99			+		

Comments:
(2000 characters)

Save

Submit

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Description:-

- Here Above Template will be loaded for the employee as per his/her designation.
- After that the Goals and Parameters needs to be selected as per the requirement
- Soft Factors can be added as per the requirement.
- It can Saved or Submitted Accordingly(Email will be sent once the RA clicks on Submit)

Click on Add/Edit icon

Live Timesheet Local timesheet login Login

intochips Management by

Employee

Reporting Authority

Fill MBO

Team MBO

Fill Monthly Comments

Monthly Comments Report

Team Compliance Report

Admin

Reports

Welcome Urvish Shah

Parameter Details

Hard Factors > Gross Margins > Gross Margins

Valid Range for Gross Margins

A	Fix 100.0
B	Between 90.01 - 99.99
C	Between 75.0 - 90.0
D	Between 0.0 - 74.99

To Make Weightage = 0 % Please select Project = NA

Type	Value	Remarks (500 characters)
Weightage: *	<input type="text"/>	
Project: *	<input type="text" value="--Select--"/> NA All Projects	<input type="text" value="500"/>
Target: *	<input type="text"/>	<input type="text" value="500"/>
Actual:	<input type="text"/>	<input type="text" value="500"/>

Cancel Save

Comments: (2000 characters)

Save

Submit

Add Soft Factors

Actual	Rank	Add	Edit	Delete
		+		
		+		
		+		
		+		

- Here as shown above RA can fill the up the necessary details or he can edit the same.
- After clicking Save the target will be saved and then once he finally submits the target will be created.
- This target will be visible to the employee when he/she logins to his intranet and clicks on his MBO

Employee Screens

After all the above steps , the next will be the employee role

The screenshot displays the eInfochips Management by Objectives (MBO) web application. The top header bar is blue and contains the eInfochips logo, the text "Management by Objectives [MBO]", and a user welcome message "Welcome Kaushal Kumar" with a home icon and a user profile icon.

On the left side, there is a vertical navigation menu with a blue header "Employee". Below it, the "View MBO" option is highlighted in blue. Other menu items include "MBO History", "View Monthly Comments", and "Guidelines". At the bottom of this menu is a button labeled "Reporting Authority".


The main content area is titled "MBO List" and features a table with the following data:



No	Start Date	End Date	Status	Created By	Action
1	01 Jul, 2015	30 Sep, 2015	Actual Created	Urvish Shah	

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- After creating targets for the quarters by Reporting Authority ,the employee will be able to view the created target by
- Clicking on View MBO screen as shown above for the current quarter
- Employee can click on Action icon to take the necessary action mentioned below

After clicking the Action above employee can either accept or discuss the target that is created for the quarter

 Management by Objectives [MBO]

Welcome Kaushal Kumar  

▼ Employee


View MBO

MBO History

View Monthly Comments

Guidelines

► Reporting Authority

 **MBO Creation**

Name: Kaushal Kumar
Email: krishna.panchal@einfochips.com
MBO Month: Q3 - (Oct - Dec) 2015

Factor	Goal	Parameter	Project	Target	Actual
Hard Factors (70%)	Attrition (10%)	Attrition (10%)	All Projects(10%)	10 %	
	Project execution (15%)	Project execution (15%)	All Projects(15%)	90.01	
	Customer Satisfaction (5%)	Customer Satisfaction (5%)	All Projects(5%)	4.01	
	Gross Margins (15%)	Gross Margins (15%)	All Projects(15%)	90.01	
	Revenue Target (25%)	Revenue Target (25%)	All Projects(25%)	90.01	
Soft Factors (30%)	Disciplined Project Execution (30%)	Measurement of applicable metrics, reviewing the Metrics and PMR and submitting and Driving actions based on that, at regular period to internal & cus (30%)	All Projects(30%) Comments: test	Comments: test	

Comments:
(2000 characters)

Accept

Discuss

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8:- Reporting Authority and Employee Process At the End of Quarter

REPORTING AUTHORITY SCREENS

At the end of every quarter the Reporting Authority will fill up the Actual Target as compared to the target which was created at the start of quarter.

Employee List

Month: Q3 - (Oct - Dec) Year: 2015 Search

Total 9 employees reporting to you in Q3 - (Oct - Dec) - 2015.

No	Name	Designation	Projection	Closure	History	Remarks
1	Gayatri Thakkar	Technical Lead (Level 2)				
2	Gayatri Patel	Senior Engineer (Level 2)				
3	Vishal Jindal	Technical Lead (Level 1)				
4	Hirenkumar Parekh	Technical Lead (Level 2)				
5	Jigish Parikh	Technical Lead (Level 2)				
6	Mohamed Rafi Hussain	Contractor				Template not assigned.
7	Harsh Chunara	Technical Lead (Level 1)				
8	Mahipalsinh Vaghela	Senior Engineer (Level 2)				
9	Kaushal Kumar	Technical Manager				

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As shown in the above screen at the end of quarter Reporting Authority will click on closure shown above and will fill up the actuals for the employees

When RA clicks on Closure then below screen appears.

Employee

Reporting Authority

Fill MBO

Team MBO

Fill Monthly Comments

Monthly Comments Report

Team Compliance Report

Admin

Reports

MBO Creation

Name: Kaushal Kumar

Email: krishna.panchal@einfochips.com

MBO Month: Q3 - (Oct - Dec) 2015

Factor	Goal	Parameter	Project	Target	Actual	Rank	Add	Edit	Delete
Hard Factors (70%)	Attrition (10%)	Attrition (10%)	All Projects(10%)	10 %					
	Project execution (15%)	Project execution (15%)	All Projects(15%)	90.01					
	Customer Satisfaction (5%)	Customer Satisfaction (5%)	All Projects(5%)	4.01					
	Gross Margins (15%)	Gross Margins (15%)	All Projects(15%)	90.01					
	Revenue Target (25%)	Revenue Target (25%)	All Projects(25%)	90.01					
Soft Factors (30%)	Disciplined Project Execution (30%)	Measurement of applicable metrics, reviewing the Metrics and PMR and submitting and Driving actions based on that, at regular period to internal & cus (30%)	All Projects(30%) Comments: test	Comments: test					

Comments: (2000 characters)

SaveSubmit

After clicking on the edit in front of the loaded parameters Reporting Authority will fill up the actuals

After clicking Edit the below screen appears As below

Parameter Details

Hard Factors > Attrition > Attrition

Valid Range for Attrition	
A	Between 0.0 - 9.99 %
B	Between 10.0 - 15.0 %
C	Between 15.01 - 20.0 %
D	Between 20.01 - 100.0 %

To Make Weightage = 0 % Please select Project = NA

Type	Value	Remarks (500 characters)
Weightage: *	10	
Project: *	All Projects	
Target: *	10 %	
Actual: *	%	

Cancel Update

Comments: (2000 characters)

Save Submit

As shown in the above screen the RA will fill up the Actual Target same like at the time of creation of Target and update it After this RA will Submit the Actual Target.

When employees clicks on his View Mbo or MBO History Link after the above step As below:


The screenshot displays the eInfochips Management by Objectives (MBO) system interface. The header includes the eInfochips logo and the text "Management by Objectives [MBO]". A user greeting "Welcome Kaushal Kumar" is visible in the top right corner. The left sidebar contains a navigation menu with the following items: "Employee" (expanded), "View MBO", "MBO History" (selected), "View Monthly Comments", "Guidelines", and "Reporting Authority". The main content area is titled "MBO History List Page" and features a search filter with "Month" set to "Q2 - (Jul - Sep)" and "Year" set to "2015". Below the search filter, a message states "MBO History from Q1 - (Apr - Jun)-2015 To Q4 - (Jan - Mar)-2016". A table displays the MBO history with the following columns: No, Start Date, End Date, Status, Created By, and Action. The table contains three rows of data:



No	Start Date	End Date	Status	Created By	Action
1	01 Oct, 2015	31 Dec, 2015	Actual Created	Urvish Shah	
2	01 Jul, 2015	30 Sep, 2015	Actual Created	Urvish Shah	
3	01 Apr, 2015	30 Jun, 2015	Actual Accepted	Urvish Shah	

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As shown above Employee is able to see the Status of MBO as Actual Created for the current quarter in View MBO if the MBO Actuals is filled up before quarter ends. If the MBO Actuals is filled up by RA after the quarter ends then the employee can click on MBO History Link and select the quarter and year and check his actuals.

After clicking on Action

 Management by Objectives [MBO]

Welcome Kaushal Kumar  

▼ Employee


View MBO

MBO History

View Monthly Comments

Guidelines

► Reporting Authority

 **MBO Creation**

Name: Kaushal Kumar
Email: krishna.panchal@einfochips.com
MBO Month: Q3 - (Oct - Dec) 2015

Factor	Goal	Parameter	Project	Target	Actual
Hard Factors (70%)	Attrition (10%)	Attrition (10%)	All Projects(10%)	10 %	10 %
	Project execution (15%)	Project execution (15%)	All Projects(15%)	90.01	90.01
	Customer Satisfaction (5%)	Customer Satisfaction (5%)	All Projects(5%)	4.01	4.01
	Gross Margins (15%)	Gross Margins (15%)	All Projects(15%)	90.01	90.01
	Revenue Target (25%)	Revenue Target (25%)	All Projects(25%)	90.01	90.01
Soft Factors (30%)	Disciplined Project Execution (30%)	Measurement of applicable metrics, reviewing the Metrics and PMR and submitting and Driving actions based on that, at regular period to internal & cus (30%)	All Projects(30%) Comments: test	Comments: test	Comments: test

Comments:
(2000 characters)

Accept

Discuss

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As shown above Employee can see his actuals and he has the provision to either accept or discuss.

After clicking Team MBO As below:

The screenshot displays the eInfochips Management by Objectives (MBO) web application. The interface is divided into a left sidebar and a main content area. The sidebar contains navigation links: Employee, Reporting Authority, Team MBO (highlighted), Fill Monthly Comments, Monthly Comments Report, Team Compliance Report, Admin, and Reports. The main content area is titled 'Team' and includes a search filter for 'Month' (Q2 - (Jul - Sep)) and 'Year' (2015). Below the search filter, a table titled 'Your Team' lists employees with columns for No, Name, Designation, Projection, Closure, History, View Team, and Remarks. The table contains 9 rows of employee data. At the bottom of the page, a copyright notice states: Copyright © 2015 eInfochips Ltd. All right reserved. Compatible Browsers: Firefox 12+, Internet Explorer 8+.

No	Name	Designation	Projection	Closure	History	View Team	Remarks
1	Jigish Parikh	Technical Lead (Level 2)					
2	Mohamed Rafi Hussain	Contractor					Template not assigne
3	Gayatri Patel	Senior Engineer (Level 2)					
4	Mahipalsinh Vaghela	Senior Engineer (Level 2)					
5	Vishal Jindal	Technical Lead (Level 1)					
6	Hirenkumar Parekh	Technical Lead (Level 2)					
7	Kaushal Kumar	Technical Manager					
8	Gayatri Thakkar	Technical Lead (Level 2)					
9	Harsh Chunara	Technical Lead (Level 1)					

As shown above after clicking Team MBO the list of MBO's of the Employees under RA will be displayed. From this RA can see the history of the MBO of any employees under him or he can also click view team to see the list of employees Reporting to that employee (if any).

After clicking the Fill Monthly Comments RA

Infochips

Management by Objectives [MBO]

Welcome Urvish Shah

Employee

Reporting Authority

Fill MBO

Team MBO

Fill Monthly Comments

Monthly Comments Report

Team Compliance Report

Admin

Reports

Employee List For Monthly Comments

Month: Q2 - (Jul - Sep) Year: 2015 Search

Your Team

No	Name	Designation	Monthly Comme...	View Team	Remarks
1	Gayatri Thakkar	Technical Lead (Level 2)			
2	Gayatri Patel	Senior Engineer (Level 2)			
3	Vishal Jindal	Technical Lead (Level 1)			View Team
4	Hirenkumar Parekh	Technical Lead (Level 2)			
5	Kaushal Kumar	Technical Manager			
6	Jigish Parikh	Technical Lead (Level 2)			
7	Mohamed Rafi Hussain	Contractor			Template not assigned.
8	Harsh Chunara	Technical Lead (Level 1)			
9	Mahipalsinh Vaghela	Senior Engineer (Level 2)			

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RA can fill up the Monthly Comments for any employees under him from the above screen by clicking the green icon.

After clicking the Monthly Comments Report Reporting

The screenshot displays the eInfochips Management by Objectives (MBO) interface. The top header shows the eInfochips logo and the text "Management by Objectives [MBO]". On the right, it says "Welcome Urvish Shah" with a user icon and a notification icon.

The left sidebar contains a navigation menu with the following items:

- Employee
 - Reporting Authority
 - Fill MBO
 - Team MBO
 - Fill Monthly Comments
 - Monthly Comments Report**
 - Team Compliance Report
 - Admin
 - Reports

The main content area is titled "Monthly Comments Report". It features a search filter with "Quarter" set to "Q2 - (Jul - Sep)" and "Year" set to "2015". There are "Search" and "Download Report" buttons.

Below the search filters is a table with the following data:

No	Reportee	ReportingAuthor...	Delivery_Manager	Depart...	Designation	MBO_STATUS	Mo...	Monthly_Comme...	BU
1	Gayatri Thakkar	Urvish Shah	Urvish Shah	PES	Technical Le	Target Accepted	Jul		ISV
2	Gayatri Thakkar	Urvish Shah	Urvish Shah	PES	Technical Le	Target Accepted	Sep		ISV
3	Gayatri Thakkar	Urvish Shah	Urvish Shah	PES	Technical Le	Target Accepted	Aug		ISV

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Reporting Authority can see the relevant Comments details month wise for the whole quarter

After clicking the Team Compliance Report Here

The screenshot displays the Infochips Management by Objectives (MBO) interface. The top header shows the logo and the text "Management by Objectives [MBO]" along with a user greeting "Welcome Urvish Shah". The left sidebar contains a navigation menu with options: Employee, Reporting Authority, Fill MBO, Team MBO, Fill Monthly Comments, Monthly Comments Report, Team Compliance Report (highlighted), Admin, and Reports.

The main content area is titled "Compliance Report" and includes filters for Quarter (Q2 - (Jul - Sep)) and Year (2015), along with Search and Download Report buttons. Below the filters is a table listing employee compliance data for 18 employees.

No	Employee Code	Reportee	Reporting...	Delivery...	Depart...	Designation	MB...	BU	MBOGr...	MBONo...	MBOYe...	MBOYe...
1	11000762	Ankit K Sha	Kaushal Kui	Urvish Sha	PES	Engineer	Actua	SCMT		B	B	
2	11001446	Ashish Bhat	Kaushal Kui	Urvish Sha	PES	Senior Engi	Actua	ISV				
3	11001186	Bhaumik B	Kaushal Kui	Urvish Sha	PES	Engineer	Actua	SHAS A	A	A	A	A
4	11001401	Chiragkum	Gayatri Pab	Urvish Sha	PES	Senior Engi	Actua	QA		B	B	
5	11000780	Gayatri Pab	Urvish Sha	Urvish Sha	PES	Senior Engi	Actua	QA	A	A	A	A
6	44000336	Gayatri Tha	Urvish Sha	Urvish Sha	PES	Technical L	Actua	ISV		A	A	
7	11001410	Harsh Chun	Urvish Sha	Urvish Sha	PES	Technical L	Actua	QA		A	A	
8	11001248	Harsh Daba	Gayatri Tha	Urvish Sha	PES	Senior Engi	Actua	ISV		A	A	
9	11001113	Heena Talr	Gayatri Pab	Urvish Sha	PES	Senior Engi	Actua	QA		B	B	
10	11000582	Hirenkumar	Urvish Sha	Urvish Sha	PES	Technical L	Actua	ISV	B	B	A	A
11	11001338	Jigarkumar	Gayatri Pab	Urvish Sha	PES	Engineer	Actua	Supp		A	A	
12	11001308	Jigish Parikl	Urvish Sha	Urvish Sha	PES	Technical L	Not C	ISV		A	A	
13	11000973	Kashyap De	Hirenkumar	Urvish Sha	PES	Senior Engi	Actua	ISV		B	B	
14	11001253	Kaushal Kui	Urvish Sha	Urvish Sha	PES	Technical M	Actua	ISV	B	B	B	B
15	11000769	Kinjal Meht	Kaushal Kui	Urvish Sha	PES	Engineer	Actua	SHAS B		B	B	B
16	11001011	Kishan Gusi	Vishal Jinda	Urvish Sha	PES	Engineer	Not C	ISV		B	B	
17	11001352	Krishna Sha	Gayatri Pab	Urvish Sha	PES	Engineer	Actua	Supp		A	A	
18	11001364	Krishnaben	Raman Kun	Urvish Sha	PES	Engineer	Actua	Supp	B	B	B	B

Here the RA will be able to see the MBO details of all the employees hierarchy under him.