

HRMS

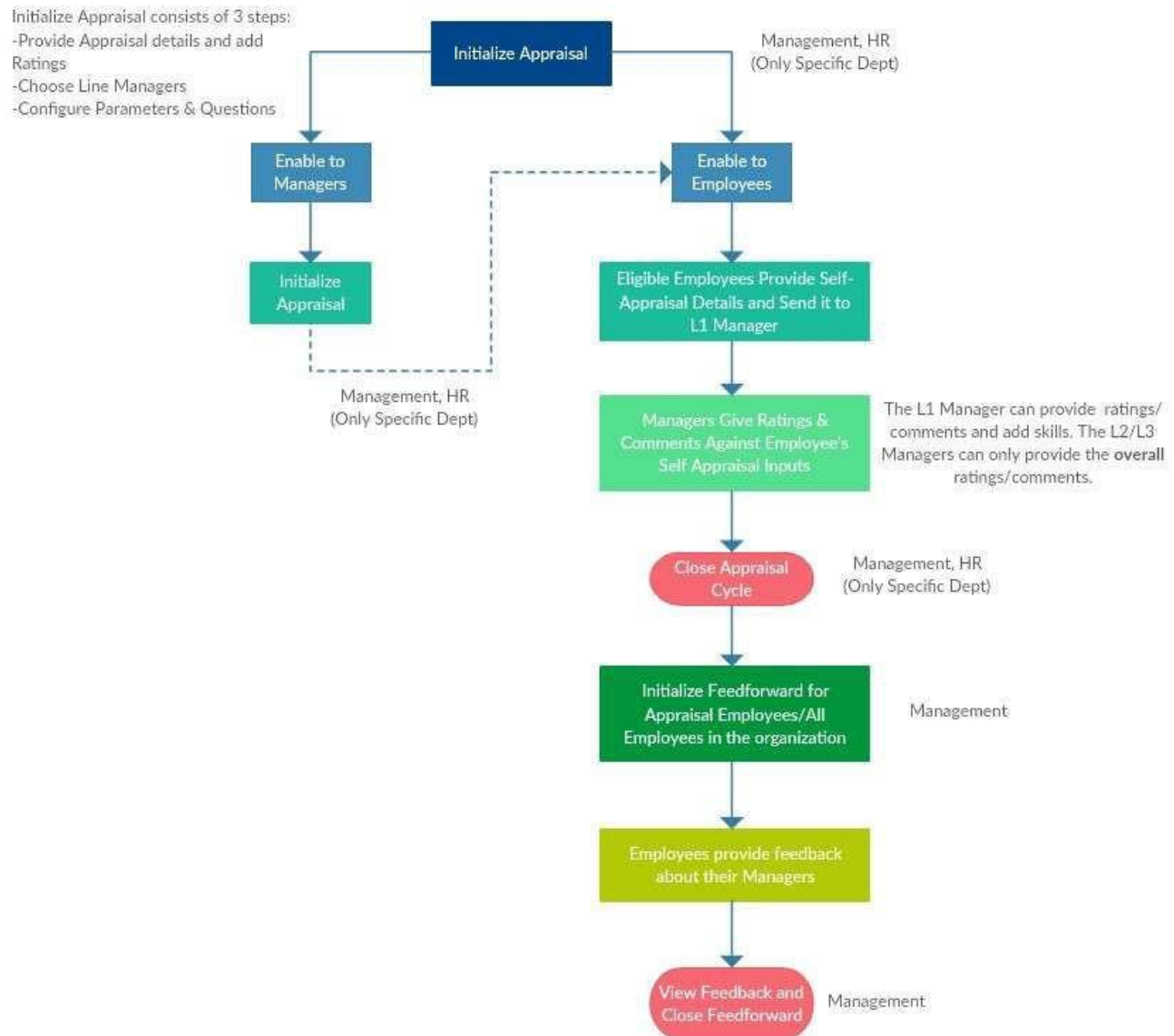
Appraisal Guide

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Introduction

Performance Appraisal is a systematic evaluation of Employee's performance and to understand their abilities for further career transition. It is generally done by the supervisors on the basis of factors such as parameters, questions, ratings etc. In HRMS, the appraisal is configured for an entire business unit or for a specific department. Below is the flowchart of the appraisal process followed in HRMS:



Process Description:

A User (Management/HR for only specific department) initializes an appraisal
The appraisal can be enabled to Managers/Employees

If it is initialized to the Managers first, then they can assign questions in addition to the ones set by the User who initialized the appraisal.

After the Managers submit their questions, the appraisal can be enabled to the Employees. (If you don't require a Manager to provide additional questions, then you can directly enable the appraisal to the Employees)

The eligible Employees will submit their self-appraisal and send it to their L1 Manager.

L1 Managers will provide their comments and ratings for each question and overall comment and rating for the Employees

Depending on the number of appraisal levels selected, the L2/L3.. Managers can only provide overall rating and comment

The User will close the appraisal cycle

Management will initialize feedforward for Employees who have completed their appraisal or for all Employees

Employees will provide feedback about their Managers

Management will view the feedback and close the feedforward process

How do I add Parameters?

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

Please refer Figure 1



Figure 1

- Click **Appraisals** in the top menu
- Click **Configuration** on the left menu panel
- Click **Parameters** in the submenu
- Click **+Add** button on the right side

Please refer Figure 2

The screenshot shows the 'Add' form for parameters in the Appraisals configuration. The left sidebar contains a 'Configuration' menu with 'Parameters' selected. The main area has a breadcrumb trail 'Home > Appraisals > Configuration > Parameters > Add'. There are two input fields: 'Parameter' (labeled 'e') and 'Description' (labeled 'f'). Below the 'Parameter' field is a 'SAVE' button (labeled 'g') and a 'Cancel' button. A small error message 'characters remaining can't be more than' is visible below the 'Description' field.

Figure 2

- e. Enter the parameter
- f. Provide Description
- g. Click **SAVE** button

How do I add Questions?

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

Please refer Figure 3

The screenshot shows the 'Questions' table in the Appraisals configuration. The left sidebar contains a 'Configuration' menu with 'Questions' selected. The main area has a breadcrumb trail 'Home > Appraisals > Configuration > Questions'. There is an 'Add' button (labeled 'd') in the top right corner. The table has four columns: 'Action', 'Parameter', 'Question', and 'Description'.

Action	Parameter	Question	Description
	KRA	Verification	Static testing
	Generic	fdgfd	
	KRA	What is PMP	Project management
	KPI	What is Metrix	Numbers
	KPI	Validation	Dynamic testing
	Generic	How long are you working on this project	Tell us about your project details and p...
	KRA	test question	
	KRA	Explain at high level projects that you ...	Explain at high level projects that you ...

Figure 3

- a. Click **Appraisals** in the top menu
- b. Click **Configuration** on the left menu panel
- c. Click **Questions** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 4

Figure 4

- e. Select a parameter from dropdown
- f. Add other parameter
- g. Enter the question
- h. Provide description
- i. Click **ADD NEW QUESTION** to add a new question
- j. Click **SAVE** button

How do I add Skills?

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

Please refer Figure 5

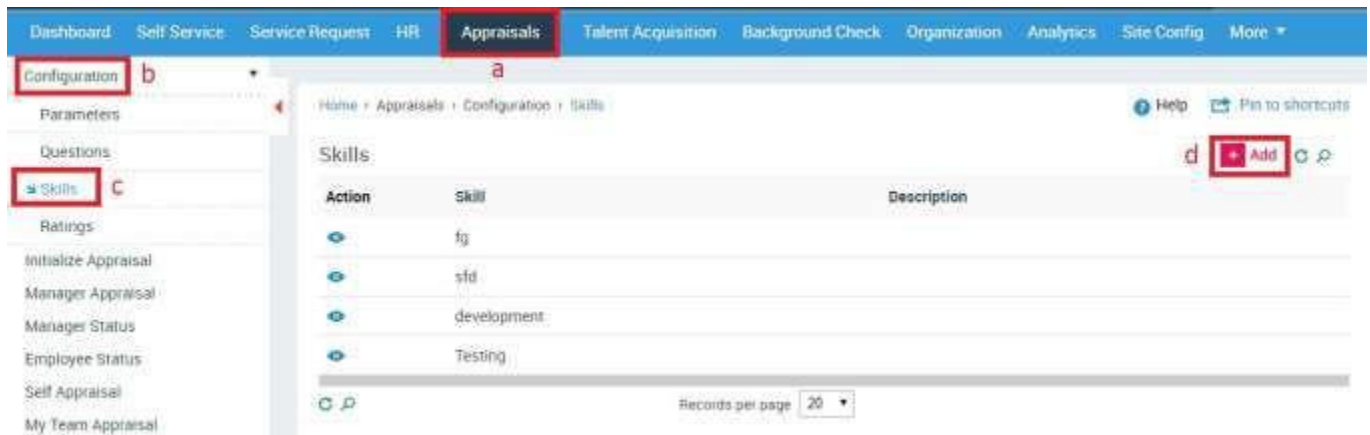


Figure 5



Figure 6

- e. Enter the skill
- f. Provide description if necessary
- g. Click **SAVE** button

How do I add Ratings?

You can add Ratings after completing the first step of Initialize Appraisal. This option is only for editing existing Ratings, provided Employees have not initiated the self-appraisal process

Ratings are defined for each business unit or department. The rating scales 1-5 and 1-10 are available in HRMS.

Please refer Figure 7



Figure 7

- Click **Appraisals** in the top menu
- Click **Configuration** on the left menu panel
- Click **Ratings** in the submenu
- Click **Edit** icon on the right side

Please refer Figure 8

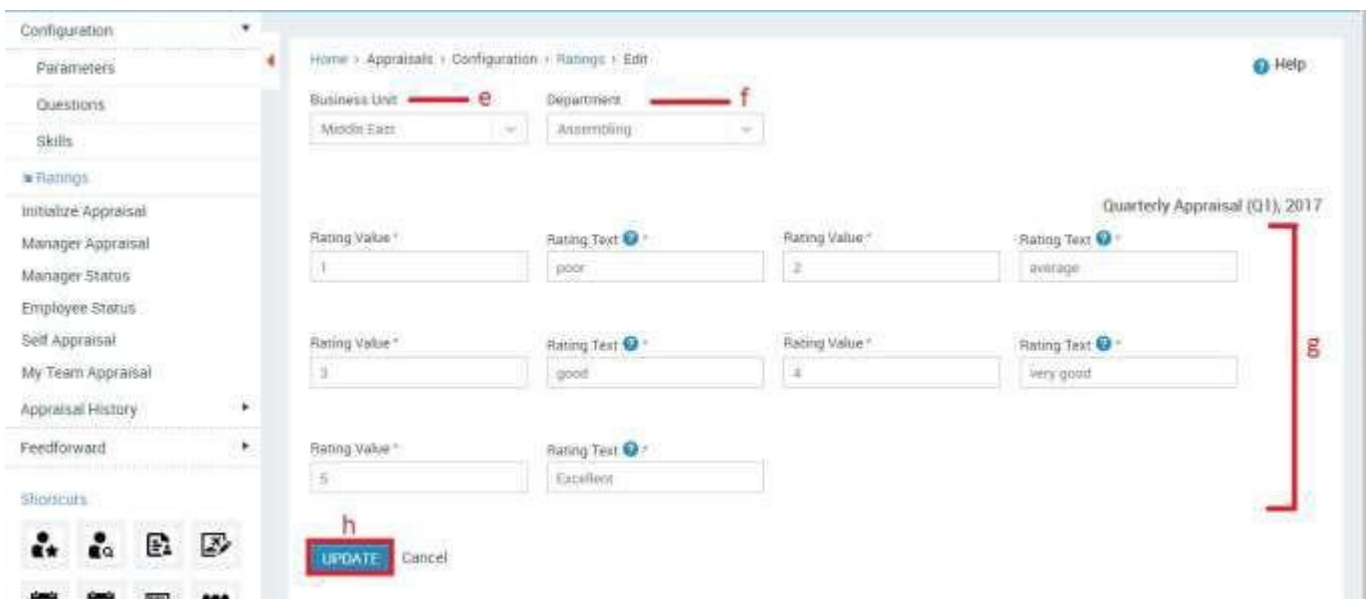


Figure 8

- e. Select a Business Unit from the dropdown list
- f. Select a Department from the dropdown list
- g. Provide rating text for each rating value
- h. Click **UPDATE** to save the ratings

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

How do I Initialize an Appraisal process?

Please refer Figure 9

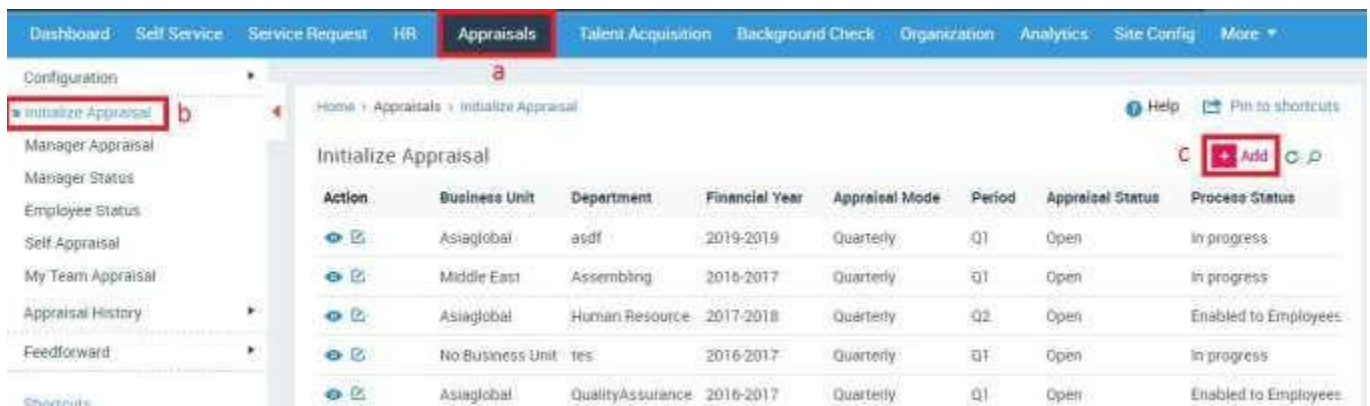


Figure 9

- a. Click **Appraisals** in the top menu
- b. Click **Initialize Appraisal** on the left menu panel
- c. Click **+Add** button

Please refer Figure 10

The screenshot displays the 'Initialize Appraisal' configuration interface. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. The left sidebar lists various HR functions, with 'Initialize Appraisal' selected. The main content area shows a progress bar with three steps: Step 1 (Initialization, Completed), Step 2 (Configure Line Managers, In Progress), and Step 3 (Configure Appraisal Parameters, In Progress). Below the progress bar, the 'Configure Appraisal Details' section contains several configuration options: Business Unit (Middle East), Department (Assembling), Year Range (2016-2017), Appraisal Mode (Quarterly), Period (Q1), Appraisal Status (Open), Enable To (Managers), Managers' Due Date (2016-Sep-22), Eligibility (Contract, Full Time, Permanent, Probationary, Temporary), Parameters (KRA, KPI), and Appraisal Ratings (1-5). A red 'UPDATE' button is located at the bottom left of the configuration section.

Figure 10

Step 1: Initialization

- d. Enter the required details (Business Unit, Department, Year Range)
- e. There are 3 appraisal modes available: Quarterly (Q1, Q2, Q3, Q4), Half-Yearly (H1, H2), Yearly
- f. Period will be populated automatically depending on the appraisal mode you have selected
- g. Appraisal Status is by default Open in Initialize appraisal
- h. Select an option in Enable To dropdown. You can enable to Managers/Employees
- i. Based on the Enable To option, set a due date for the Employees/Managers to submit the appraisal details
- j. Select one or more eligibility criteria (Employees who are eligible for the appraisal process)
- k. Select parameter(s)
- l. Select a Ratings range (1-5 or 1-10)
- m. Click **SAVE** button to initialize appraisal for a Business Unit/Department

You will need to define the ratings before you proceed to **Step 2**.

Please refer Figure 11



Figure 11

- a. Click here to provide text to represent the rating numbers

Please refer section [How do I add Ratings?](#) to find out how to provide rating text.

Step 2: Configure Line Managers

Once the appraisal process is initiated for a Business Unit/Department, the Line Managers must be configured to evaluate the Employee's appraisal.

The Line Managers can be configured in two ways:

1. Choose by Organization Hierarchy

- Establish appraisal process as per the organization hierarchy where the Line Managers will be the same as the Reporting Managers
- 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

Please refer Figure 12

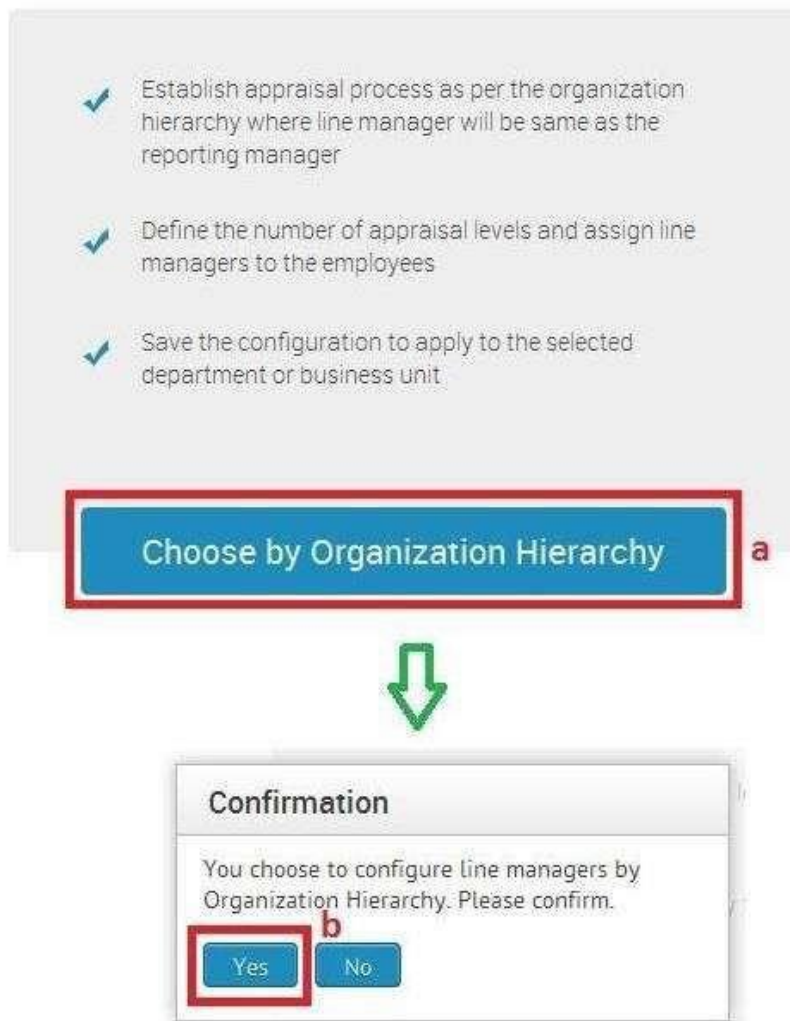


Figure 12

- a. Click **Choose by Organization Hierarchy** button

A small confirmation window will appear.

- b. Click **Yes** button

Please refer Figure 13

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 : General Administration Department : Hardware Quarterly Appraisal (Q1), 2016

Configure Line Managers by Organization Hierarchy BACK

<div>  <div> <p>Raj Davuluri</p> <p>SE0006</p> <p>Admin Head</p> </div> </div>	L1 Manager	Employee(s) 1	d 
<div>  <div> <p>George Rimes</p> <p>SE0011</p> <p>Manager</p> </div> </div>	L1 Manager	Employee(s) 1	

SAVE c

Figure 13

- c. Manager(s) names will be displayed
- d. Click here to view the Employees reporting to the displayed Managers

Please refer Figure 14

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 : General Administration Department : Hardware Quarterly Appraisal (Q1), 2016

Configure Line Managers by Organization Hierarchy BACK


 **Raj Davuluri**
SE0006
Admin Head

L1 Manager

Employee(s)

1

Employees under L1 Manager

 **George Rimes**
(SE0011)
Manager

e

Configure Line Managers

Select Appraisal Levels

2 **f**

L2 Manager

Clarissa Franco - IT Director **g**

h **SAVE** **CANCEL**

Figure 14

- The Employees reporting to the Manager will be displayed here
- Select the number of appraisal levels you want (We have selected 2 in this example). You can have a maximum of 5 appraisal levels.
- Select your L1/L2... Manager(s)
- Click **SAVE** button



If you have only 1 appraisal level, then you don't need to select any appraisal level. Click **SAVE** button to proceed to the next step.

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

Please refer Figure 15

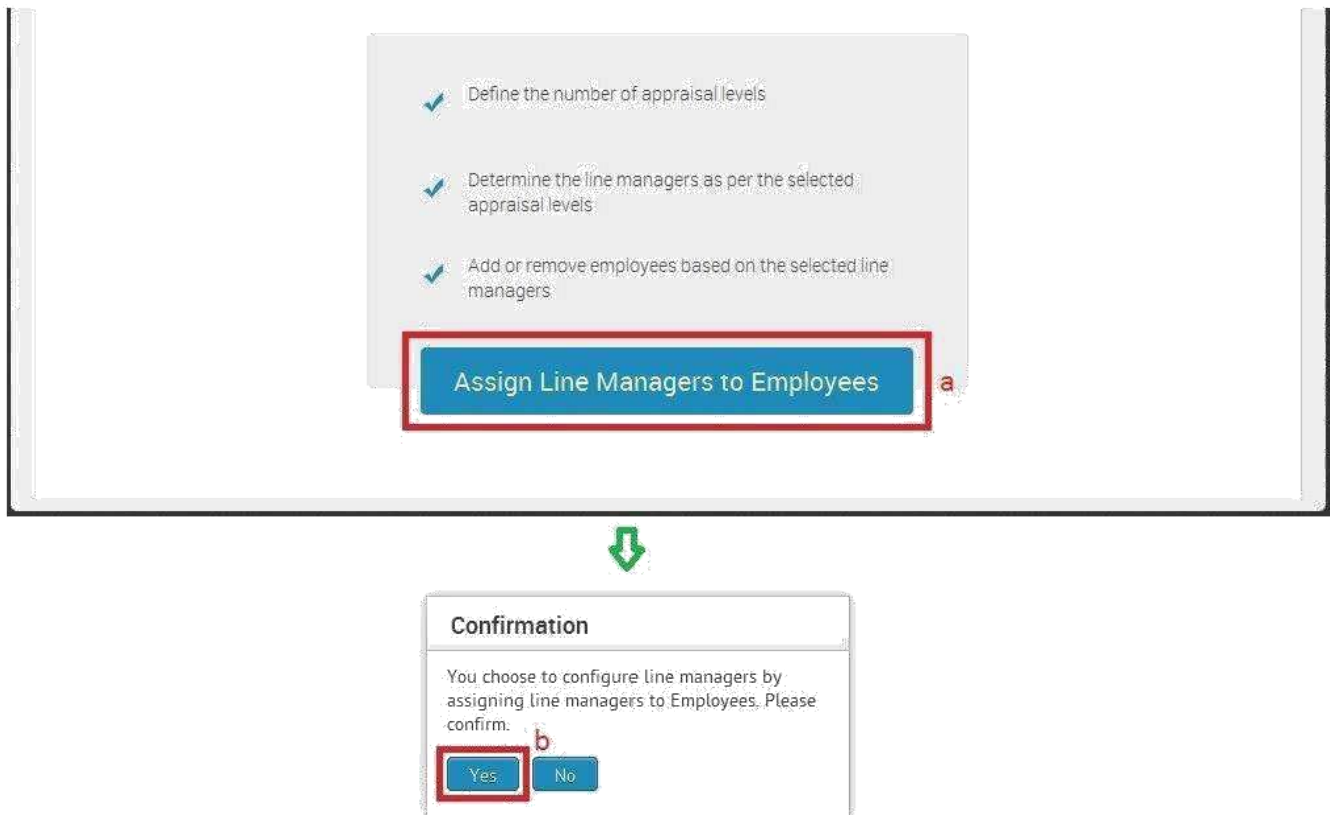


Figure 15

a. Click **Assign Line Managers to Employees**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 16

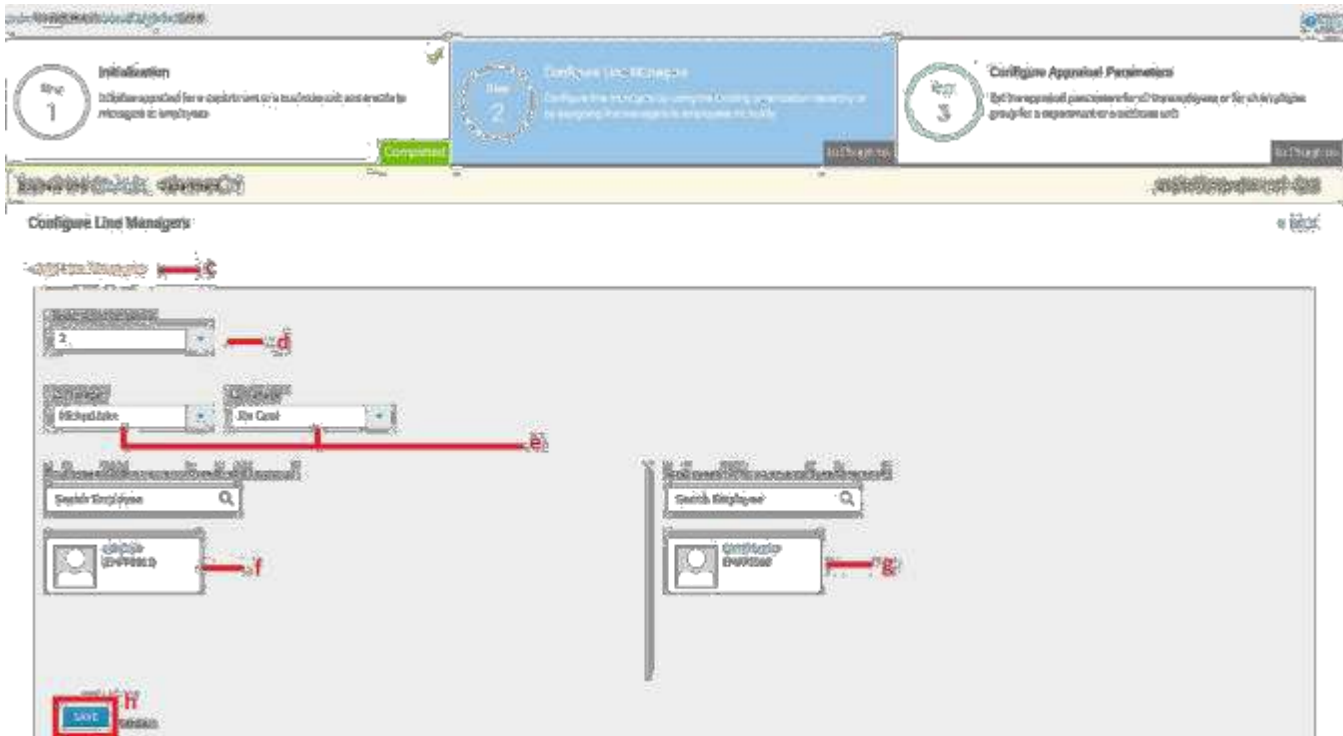


Figure 16

- c. Click **+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 on the bottom left
- g. Click on the Employee(s) on the left side to select them for the appraisal process
- h. Click **SAVE** button

Step 3: Configure Appraisal Parameters

Configure the appraisal parameters after configuring the Line Managers. Here, the appraisal process can be made applicable to all Employees of the **Business Unit** or **Customized Employee Groups**. 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

Please refer Figure 17

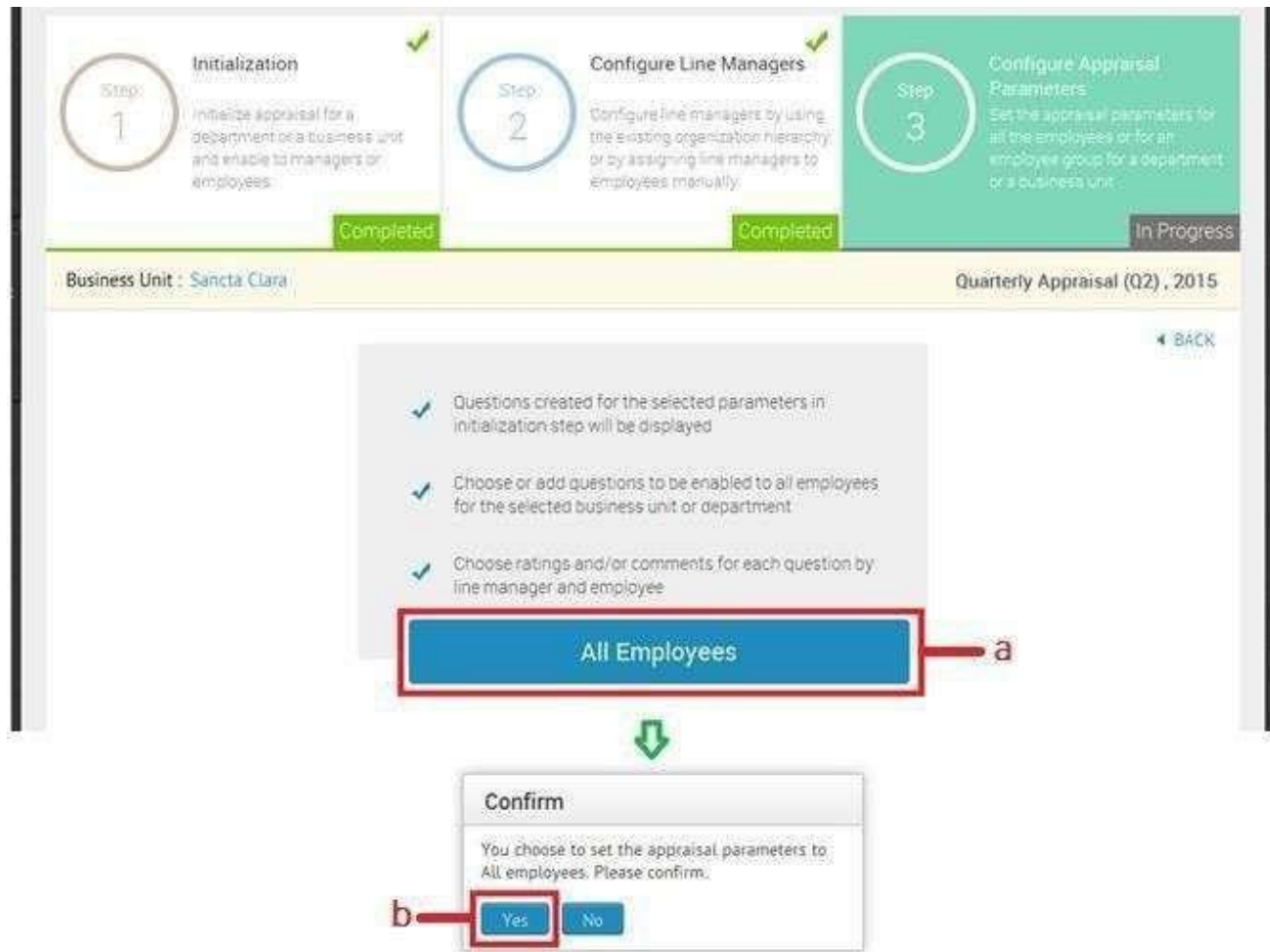


Figure 17

a. Click **All Employees**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 18

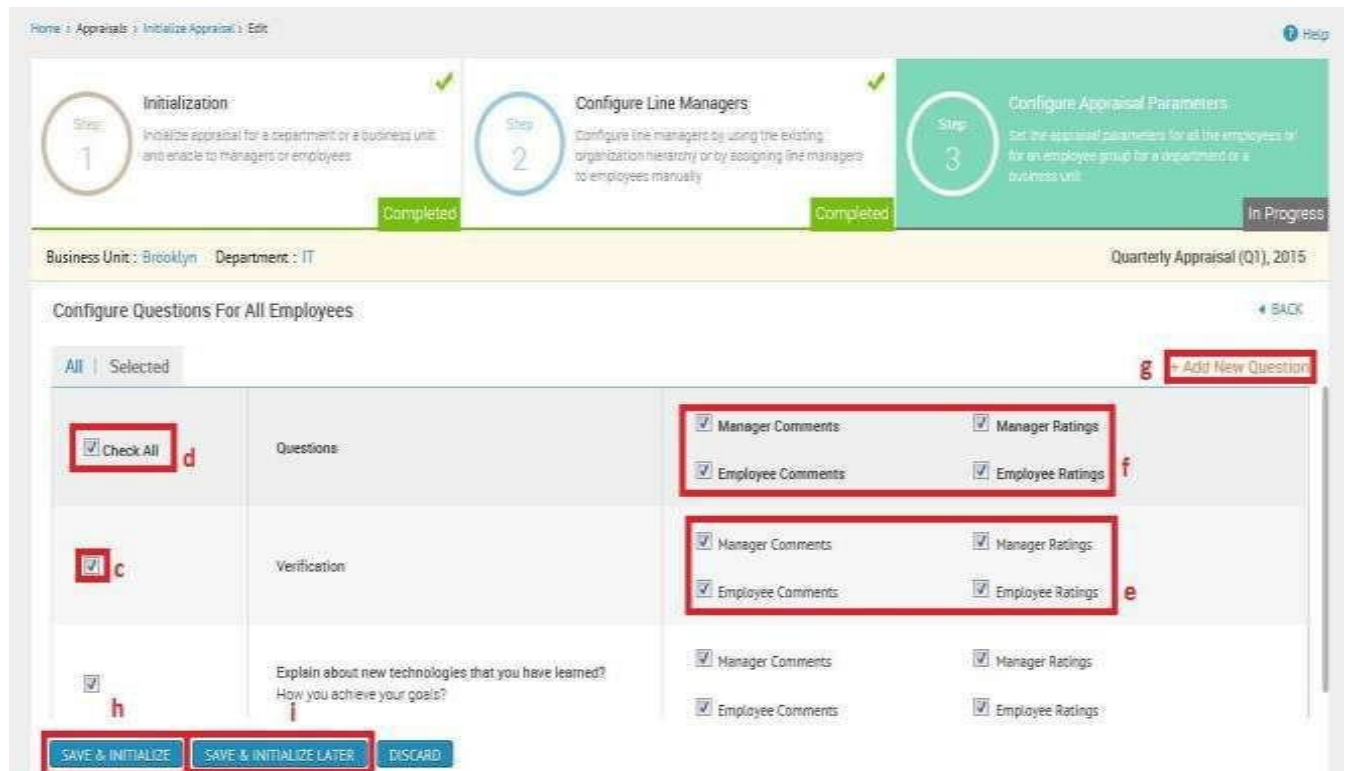


Figure 18

- 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. Enable Manager/Employee Comments or Manager/Employee Ratings for a specific question. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.

Or

- f. Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- g. Click **+Add New Question** option to add more questions to the appraisal process
- h. Click **SAVE & INITIALIZE** button to initialize the appraisal

Or

- i. Click **SAVE & INITIALIZE LATER** button to only save the appraisal details

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

Please refer Figure 19

The screenshot displays a web interface for 'Quarterly Appraisal (Q2), 2015' for the 'Sancta Clara' business unit. It features two main panels, each with a list of three items marked with checkmarks: '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', and 'Choose ratings and/or comments for each question by line manager and employee'. The first panel has a blue button labeled 'All Employees'. The second panel has a blue button labeled 'Customized Employee Groups', which is highlighted with a red rectangular box and labeled with a red 'a'. Below the main interface, a green downward arrow points to a 'Confirm' dialog box. The dialog box contains the text 'You choose to set the appraisal parameters to customized employee groups. Please confirm.' and two buttons: 'Yes' (highlighted with a red box and labeled with a red 'b') and 'No'.

Figure 19

a. Click **Customized Employee Groups**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 20

Business Unit: Department: Spring: Approval: Date:

Customized Employee Groups

CREATE NEW GROUP **DISCARD**

Employees: Search Employee

Dipak Kumar (E999043) Software Engineer

All Selected **CONFIRMATION**

Group Name	Description	Settings
<input checked="" type="checkbox"/> Group 1	Project Work Briefly explain 1. assignment, etc. project, in that work area	<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"/> Group 2	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"/> Group 3	Skills Briefly explain 1. The skills that you have honed/learned the last 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 **Save**

Figure 20

-
- c. Click **CREATE NEW GROUP** button
 - d. Enter group name
 - e. Select Employees applicable for the appraisal process
 - f. Select questions individually

Or

- g. Select all the questions by selecting **Check All**
- h. Enable Manager/Employee Comments or Manager/Employee Ratings for a specific question. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.

Or

- i. Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- j. Click **+Add New Question** option to add more questions to the appraisal process
- k. Click **SAVE** button

Please refer Figure 21

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**

Figure 21

Confirm

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

Yes **No**

Figure 21

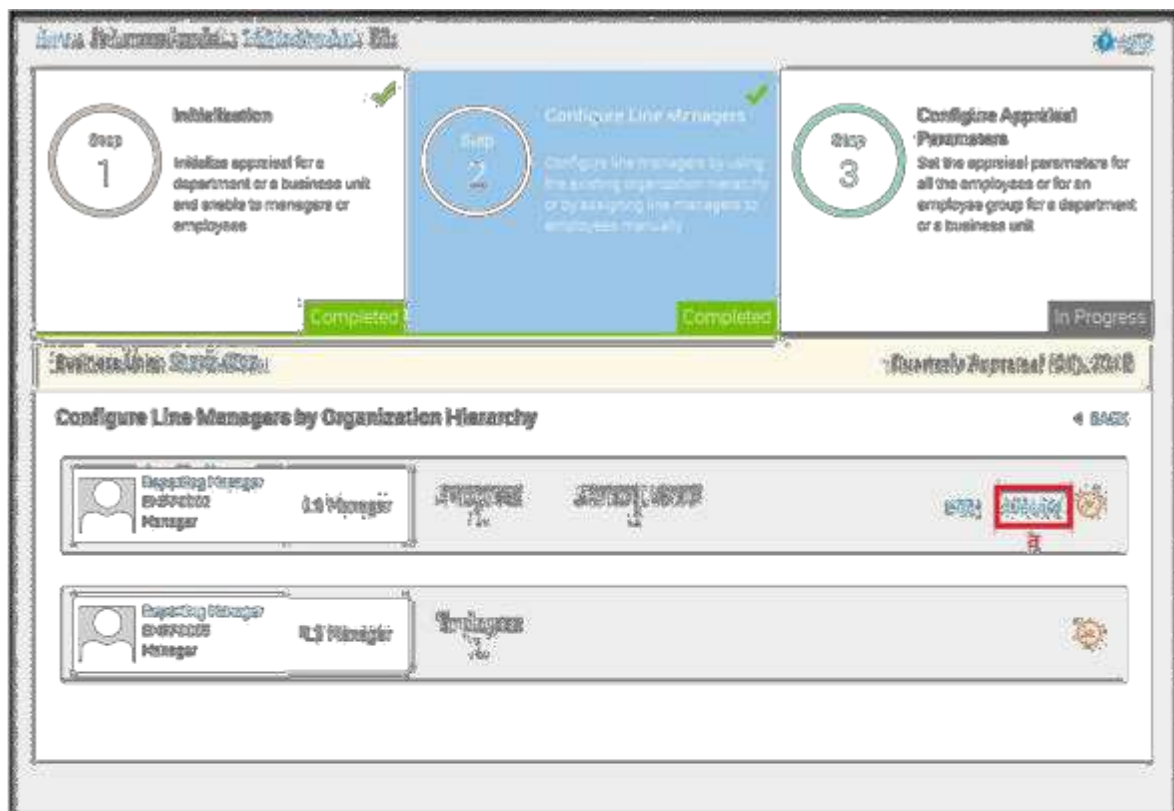
Figure 21

- I. Upon saving the appraisal parameters, click **INITIALIZE** button to initialize the appraisal process
- m. Click **INITIALIZE LATER** button to only save the appraisal process
- n. Click **Yes** button in the confirmation box to initialize the appraisal

How do I undo/discard Line Manager Configuration?

You can discard the Line Manager's configuration after saving the appraisal process in **Step 2**.

Please refer Figure 22



OR

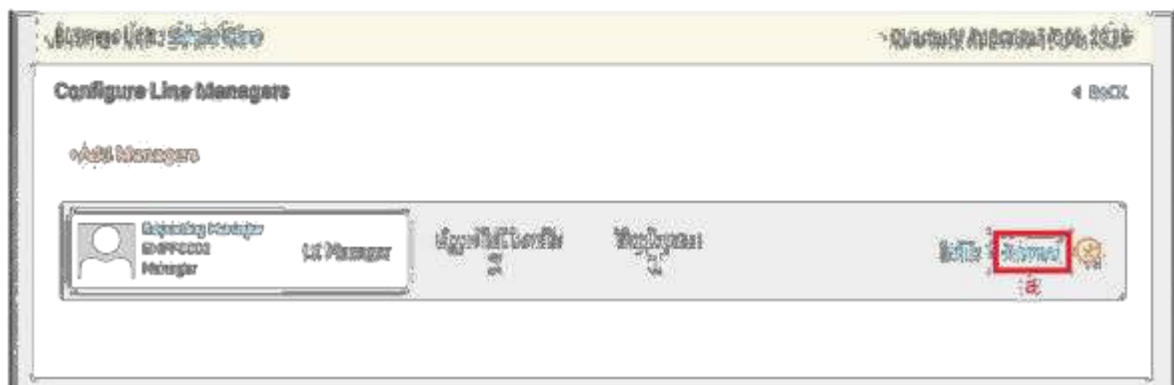


Figure 22

- a. Click **Discard** option to remove the Line Manager configurations

How do I set additional appraisal questions as a Manager?

In the first step of Initialize appraisal, if the appraisal is enabled to the Managers, then Managers can set questions in addition to the ones initially added by the HR/Management. Once the parameters are set, Managers can create Employee groups and apply the appraisal parameters to the group.

Please refer Figure 23

Home > Appraisals > Manager Appraisal

Manager Appraisal






Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status
 d	Global Systems India	Development	2017-2018	Quarterly	Q1	Open
	Global Systems India	Quality	2018-2019	Yearly	Yearly	Force Closed
	Global Systems India	Development	2016-2017	Yearly	Yearly	Closed
	Global Systems India	Human Resource	2015-2016	Yearly	Yearly	Closed
	Global Systems India	Quality	2017-2018	Yearly	Yearly	Closed
	Orange Blossom	Information Technology	2015-2015	Quarterly	Q1	Open
	Global Systems India	Quality	2016-2017	Yearly	Yearly	Closed
	Global Systems India	Quality	2015-2016	Yearly	Yearly	Closed

Figure 23

- Login as a Manager
- Click **Appraisals** in the top menu
- Click **Manager Appraisal** on the left menu panel
- Click **Edit** icon against an appraisal process

Please refer Figure 24

Initialization Details

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

<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 24

- e. Create new group (E.g., Support, Testing, Development, etc.)
- f. Add Employees to the group by clicking on an Employee
- g. Click **Add New Question** option to add questions for a particular group of Employees
- h. Select Questions individually

Or

- i. Select all the questions by selecting **Check All**
- j. Enable Manager/Employee Comments or Manager/Employee Ratings for a specific question. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.

Or

- k. Select Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- l. Click **SAVE** button

Upon saving appraisal details, the Manager must **SUBMIT** the appraisal process for initialization.

How do I enable the appraisal to Employees?

You can update the appraisal process by changing the process status from Enable to Managers to Enable to Employees and providing Employee Due Date.

Please refer Figure 25

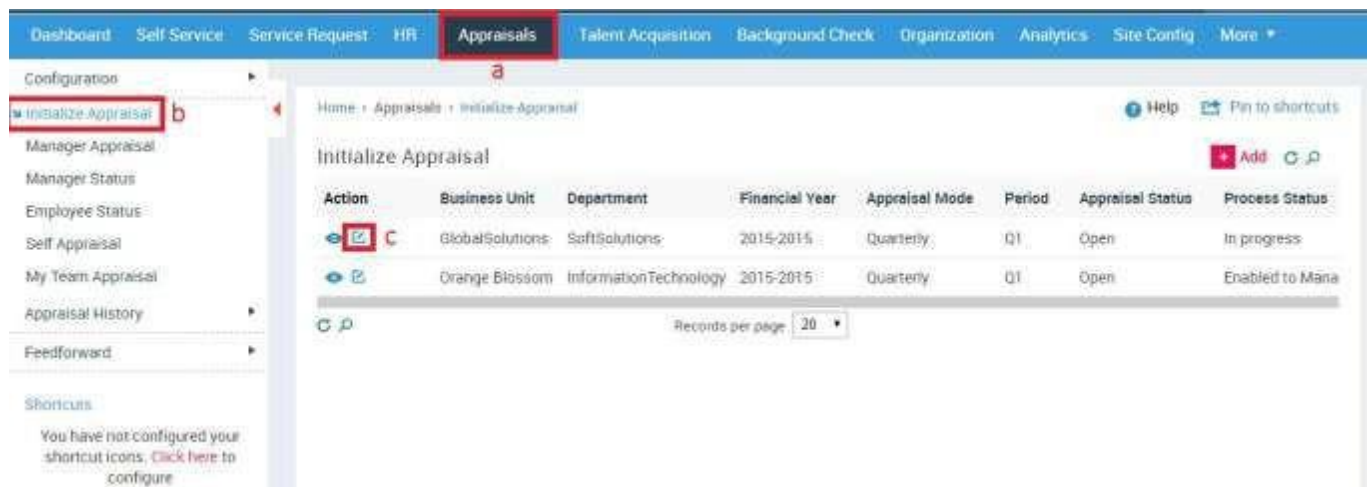


Figure 25

- Click **Appraisals** in the top menu
- Click **Initialize Appraisal** on the left menu panel
- Click **Edit** icon against an appraisal process

Please refer Figure 26

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 Completed

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

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	Open	Managers Due Date	05/20/15
Enable To	Enable To Employees	Employee Due Date	05/29/15
Appraisal Ratings	1-5		

UPDATE Cancel

Figure 26

- Select **Enable to Employees** in the Enable To dropdown
- Select a date as the Employee Due Date
- Click **UPDATE** button to enable the appraisal process to Employees

How do I view a Manager's Status?

You (Management/HR) can view the Manager's appraisal status.

Please refer Figure 27

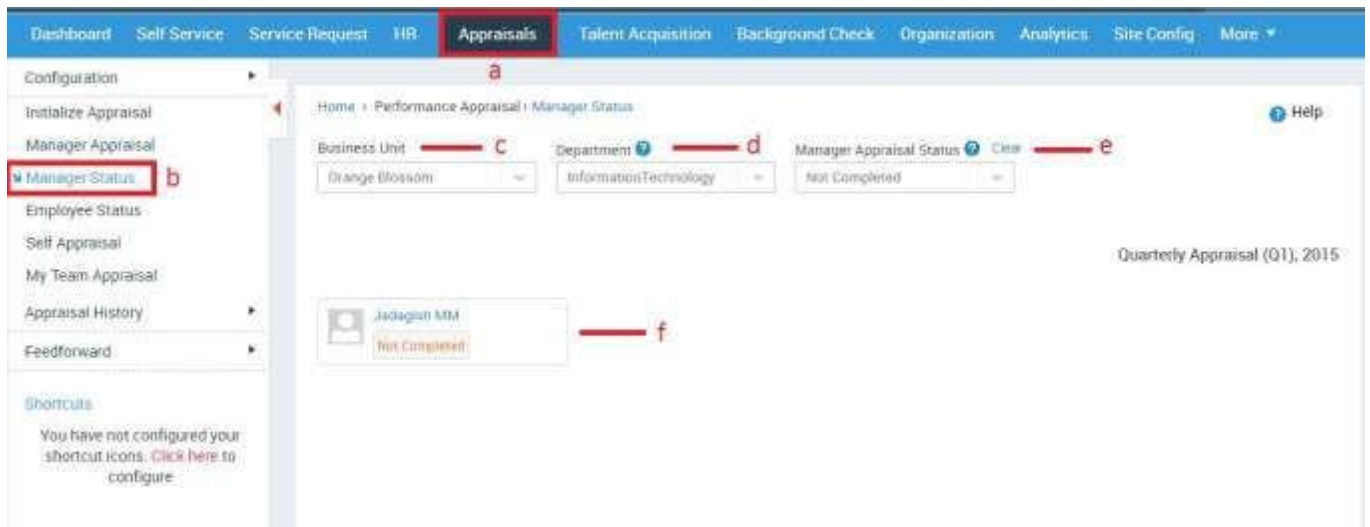


Figure 27

- a. Click **Appraisals** in the top menu
- b. Click **Manager Status** on the left menu 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

How do I provide Self Appraisal?

You can provide self-appraisal details such as ratings and comments. Upon completion of self-appraisal, your appraisal details will be visible to your line Managers for further ratings and comments.

Please refer Figure 28

The screenshot displays the 'Self Appraisal' interface. At the top, a navigation bar includes 'Appraisals' (labeled 'a'). The left sidebar contains 'Self Appraisal' (labeled 'b'). The main area shows appraisal details for 'Aarwin PH' (HR Manager) with a due date of '2016-Sep-22'. A 'Rating Definition' link (labeled 'e') is visible. Below, a table (labeled 'd') for rating questions is shown, with a 'KRA' label (labeled 'c') to its left. At the bottom, 'SAVE AS DRAFT' (labeled 'g') and 'SEND TO L1 MANAGER' (labeled 'f') buttons are present.

Question	Rating	Comments
How Would You Rate the Quality of your Work?	★ ★ ★ ★ ★	<input type="text"/>
How Effectively you Communicate With Team?	★ ★ ★ ★ ★	<input type="text"/>
How far you have achieved your goals this year?	★ ★ ★ ★ ★	<input type="text"/>

Figure 28

- Click **Appraisals** in the top menu
- Click **Self Appraisal** on the left menu panel
- The parameters are displayed above the questions grid
- Provide rating and comments for every question
- Click **Rating Definition** option to view the text for each rating
- Click **SEND TO L1 MANAGER** button to send the self-appraisal details it to L1 Manager
- Click **SAVE AS DRAFT** button to only save the appraisal process

How do I provide appraisal ratings and comments for an Employee?

You (L1 Manager) will be able to view your team Employees' appraisal status. Once the Employees complete their appraisal process, you 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.

Please refer Figure 29

The screenshot shows the 'Appraisals' section of a web application. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals' (highlighted with 'a'), 'Talent Acquisition', 'Organization', 'Expenses', and 'Time'. The left sidebar has 'Configuration', 'Manager Appraisal', 'Self Appraisal', 'My Team Appraisal' (highlighted with 'b'), 'Appraisal History', and 'Feedforward'. The main content area is titled 'Home > Appraisals > My Team Appraisal'. It features a search bar, a 'Select Appraisal Sc...' dropdown, and a table of employees. The first employee, Anish JJ (emp105, Software Engineer), has an appraisal status of 'Pending L1 ratings' (highlighted with 'd'). To the right, there is a section for 'L1 Manager Overall Rating' with a star rating and a text input field (highlighted with 'f'). Below this is a table with columns: Question, Employee Rating, Rating, and Comments. The table contains three rows of questions with corresponding ratings and star ratings (highlighted with 'g'). At the bottom of the table are buttons for 'SUBMIT' (highlighted with 'h'), 'SAVE AS DRAFT' (highlighted with 'i'), and 'CANCEL'. The second employee, Anish JJ (emp107, Software Engineer), has an appraisal status of 'Pending employee ratings'. The third employee, Manish HUL (emp108, Software Engineer), has an appraisal status of 'Pending employee ratings'. An 'Expand' button (highlighted with 'e') is located at the bottom right of the employee list. A 'Print' button is also visible. The interface includes a 'Collapse' button and a 'Help' icon.

Figure 29

- Click **Appraisals** in the top menu
- Click **My Team Appraisal** on the left menu panel
- All the Employees in the Manager's team will be displayed
- The status of each Employee's appraisal is displayed
- Click **Expand** option to provide Manager's rating
- Provide overall rating and comment for an Employee
- Provide the rating and comments for each question
- Click **SUBMIT** button
- Click **SAVE AS DRAFT** button to save the ratings and comments without submitting. This option will allow you to make changes to your ratings and comments later.

How do I check Employee Status?

You (Management/HR) can view the Employees appraisal status.

Please refer Figure 30

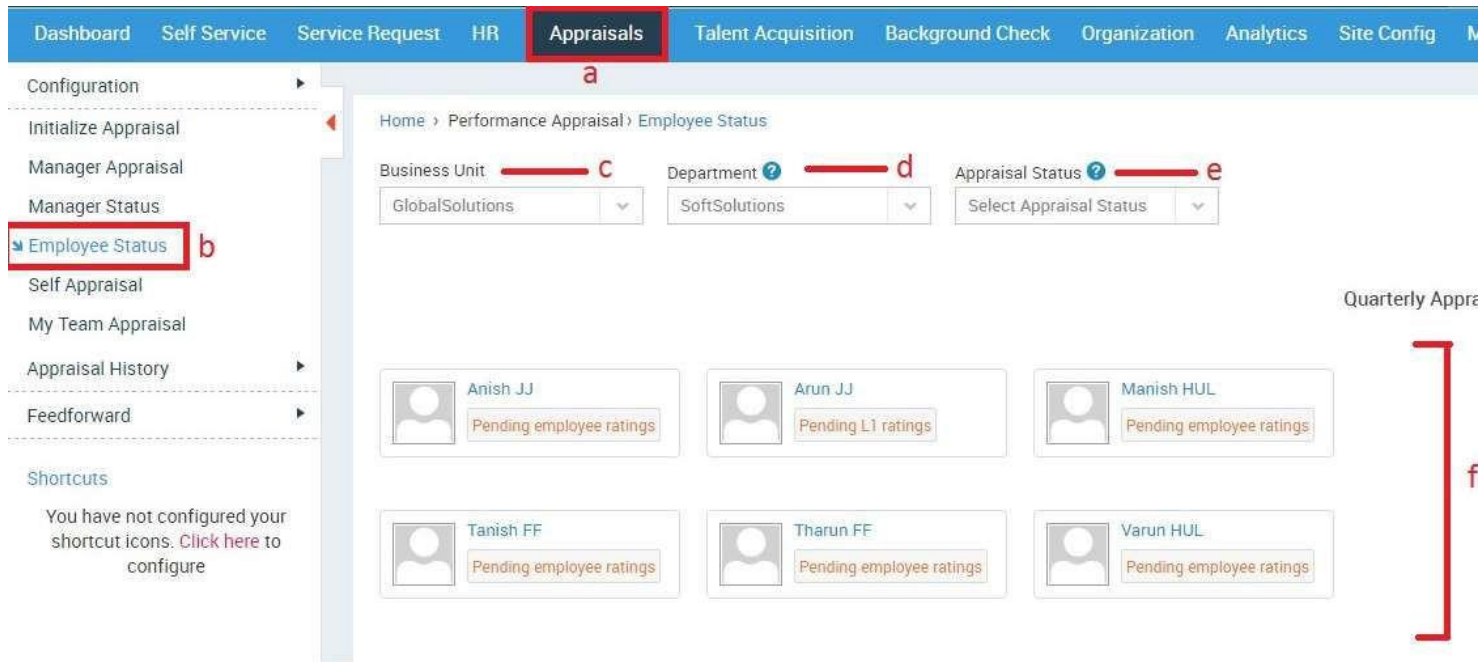


Figure 30

- a. Click **Appraisals** in the top menu
- b. Click **Employee Status** on the left menu panel
- c. Select the Business Unit
- d. Select the Department
- e. Select Appraisal Status if required
- f. Employees and their appraisal statuses will be displayed

What is Feedforward?

Feedforward is the feedback given by the Employees to appraise their respective Line Managers. All the configurations are done on the Management level. Only the Management can view the feedback given by the Employees about their Managers.

How do I add Questions for Feedforward?

Questions are added by the Management to evaluate Manager's performance.

Please refer Figure 31

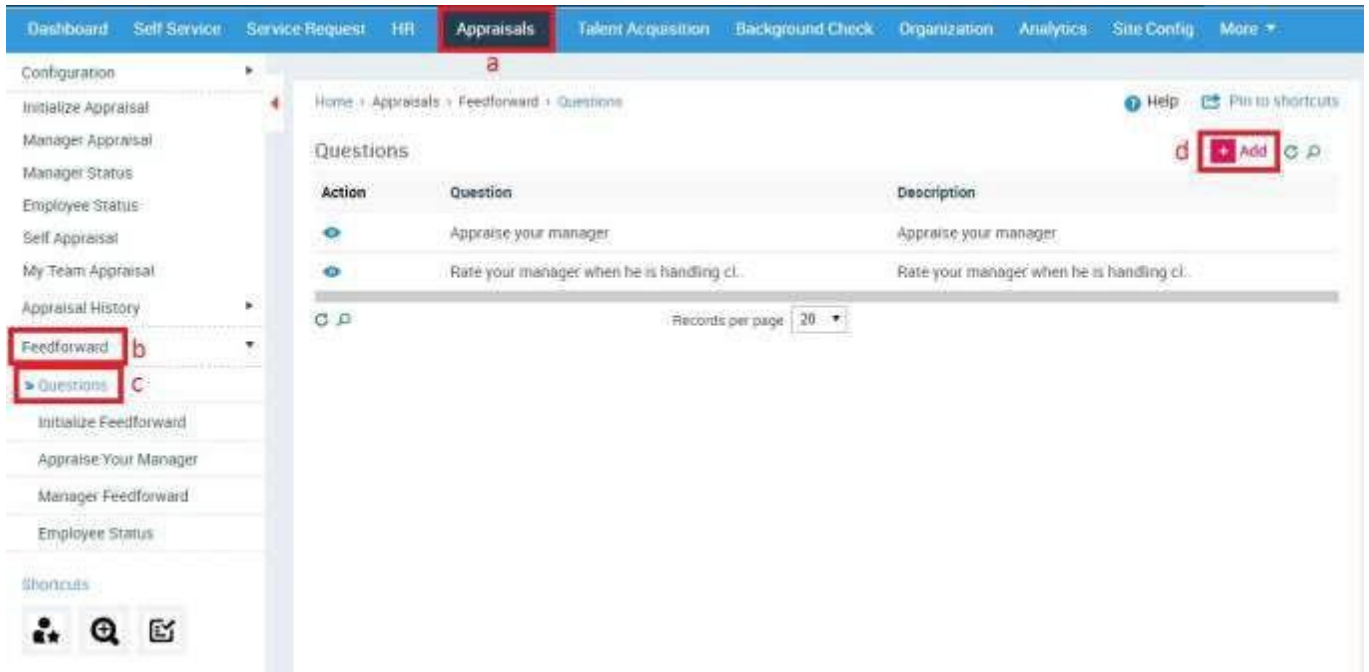


Figure 31

- Click **Appraisals** in the top menu
- Click **Feedforward** on the left menu panel
- Click **Questions** in the submenu
- Click **+Add** button

Please refer Figure 32

Figure 32

- e. Add the question and description if required
- f. Click **ADD NEW QUESTION** button to add more questions
- g. Click **SAVE** button

How do I initialize Feedforward?

In the initialize feed forward page, only the appraisals which have **Closed** status are displayed.

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

- **Show:** Employee names and their feedbacks will be displayed
- **Hide:** Only the feedback information 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** option is also provided.

Please refer Figure 33

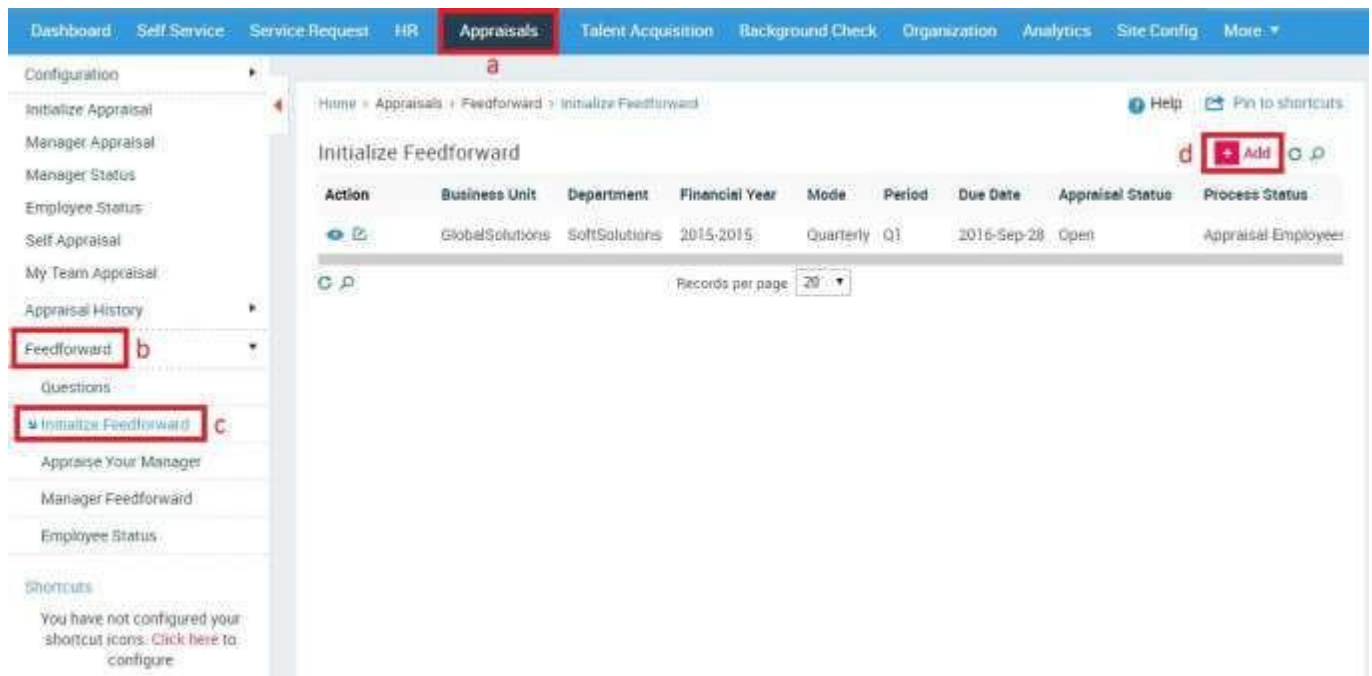


Figure 33

- Click **Appraisals** in the top menu
- Click **Feedforward** on the left menu panel
- Click **Initialize Feedforward** in the submenu
- Click **+Add** button

Please refer Figure 34

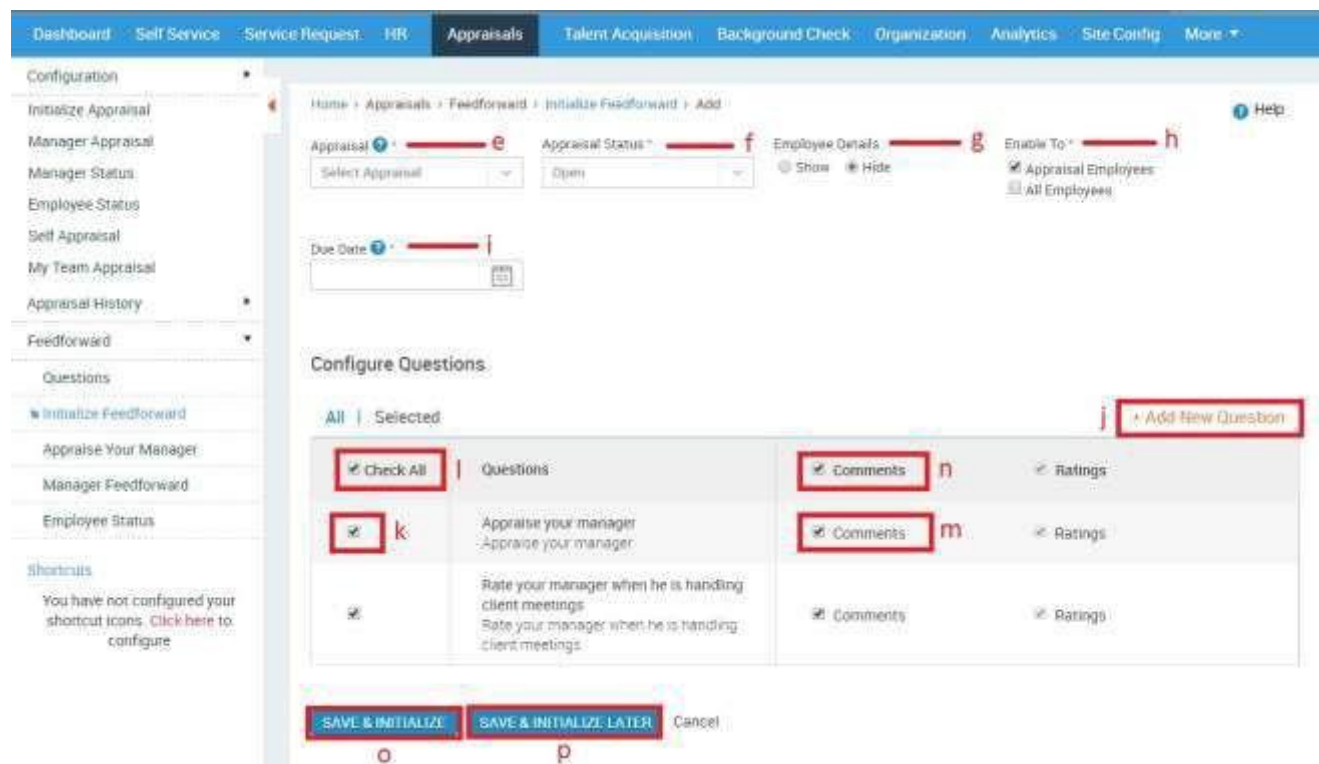


Figure 34

- e. Select an appraisal process from the Appraisal dropdown
- f. The Status will be to Open by default
- g. Select whether you want to view the Employee details along with their feedback ratings and comments or have the Employee details hidden
- h. Enable Feedforward to all Employees or only to Employees who are eligible for Appraisal process
- i. Select a due date for Employees to provide their feedback
- j. Click **Add New Question** to add new questions for Feedforward
- k. Select Questions individually

Or

- l. Select all the questions
- m. Select comments individually for all the questions

Or

- n. Select comments for all questions
- o. Click **SAVE & INITIALIZE** button to initialize the Feed Forward process
- p. Click on **SAVE & INITIALIZE LATER** button to only save the Feed Forward process

How do I Appraise my Manager?

You will be able to view the questions defined to appraise your Line Managers. You can provide ratings and comments for each question and submit the feedforward.

Please refer Figure 35

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

Manager Appraisal
Self Appraisal
My Team Appraisal
Appraisal History
Feedforward
 Appraise Your Manager

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

Home > Feedforward > Appraise Your Manager > Add

2015-2016, Quarterly Feedforward

William Wallace
emp003
Manager

Business Unit: Global Systems India
Department: Development

Due Date: 09/29/16

Question	Rating	Comments
How will get ROI? ROI	★★★★★	<input type="text"/>
How to implement? implement	★★★★★	<input type="text"/>
What is Agile Model? Agile	★★★★★	<input type="text"/>

Additional Comments

SAVE AS DRAFT **SUBMIT**

Figure 35

- Click **Appraisals** in the top menu
- Click **Feedforward** on the left menu panel
- Click **Appraise Your Manager** in the submenu
- Provide ratings and comments
- Enter additional comments (not mandatory)
- Click **SAVE AS DRAFT** button to make changes later
- Click **SUBMIT** button

How do I view Managers' Feedforward details?

You (Management) will be able to view Managers feedforward details. Upon selection of appraisal from the dropdown, feed forward details along with the Manager ratings are displayed. The average ratings of all the Employees will be highlighted. A detailed description of comments and ratings of Employees are displayed by question or by Employee.

Please refer Figure 36

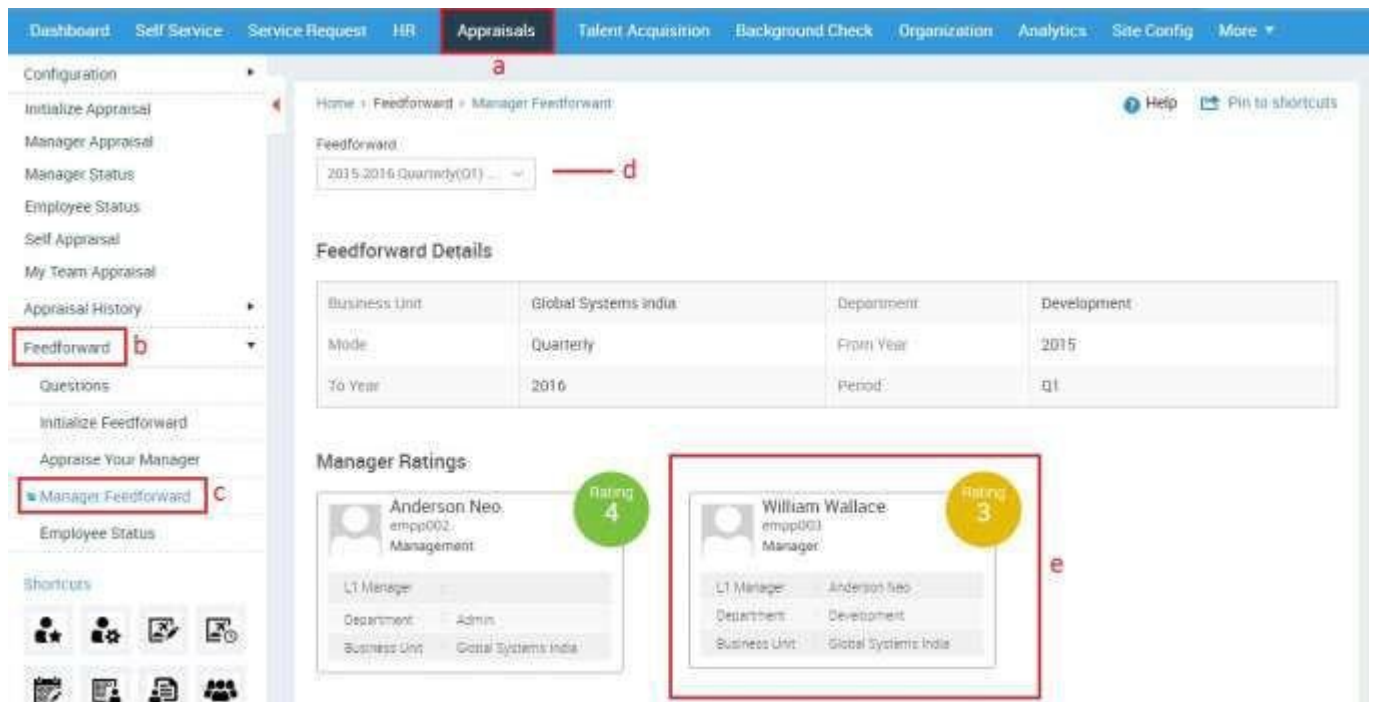


Figure 36

- Click **Appraisals** in the top menu
- Click **Feedforward** on the left menu panel
- Click **Manager Feedforward** in the submenu
- Select an appraisal process to view the Feedforward details
- Click on individual Manager section to view the ratings and comments provided by Employees

Please refer Figure 37

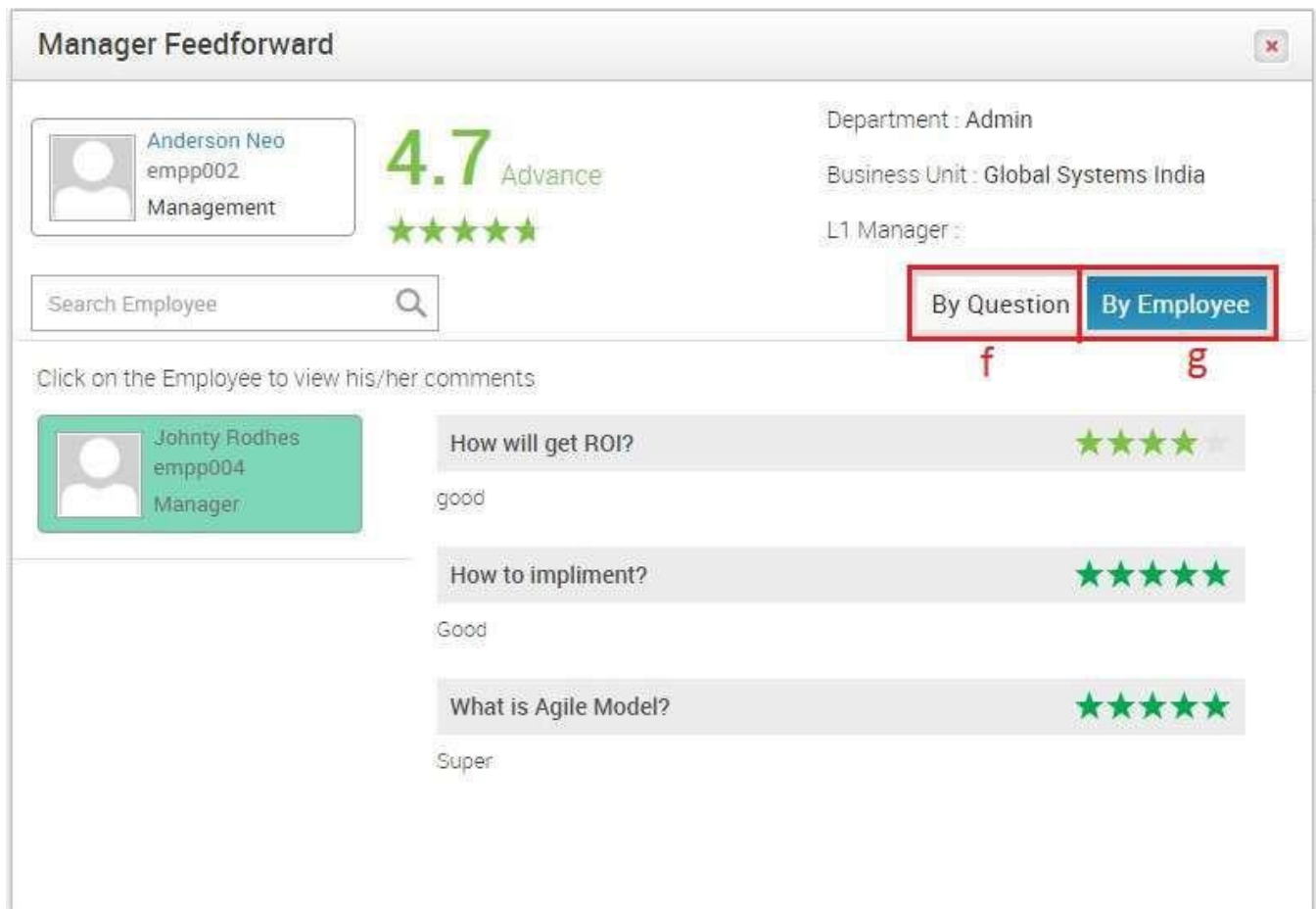


Figure 37

The below options will only be available if you have selected **Show** for the option **Employee Details** during feedforward initialization.

- 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

How do I view Employee Feedforward Status?

You (Management) will be able to view the feed forward status of all Employees.

Please refer Figure 38

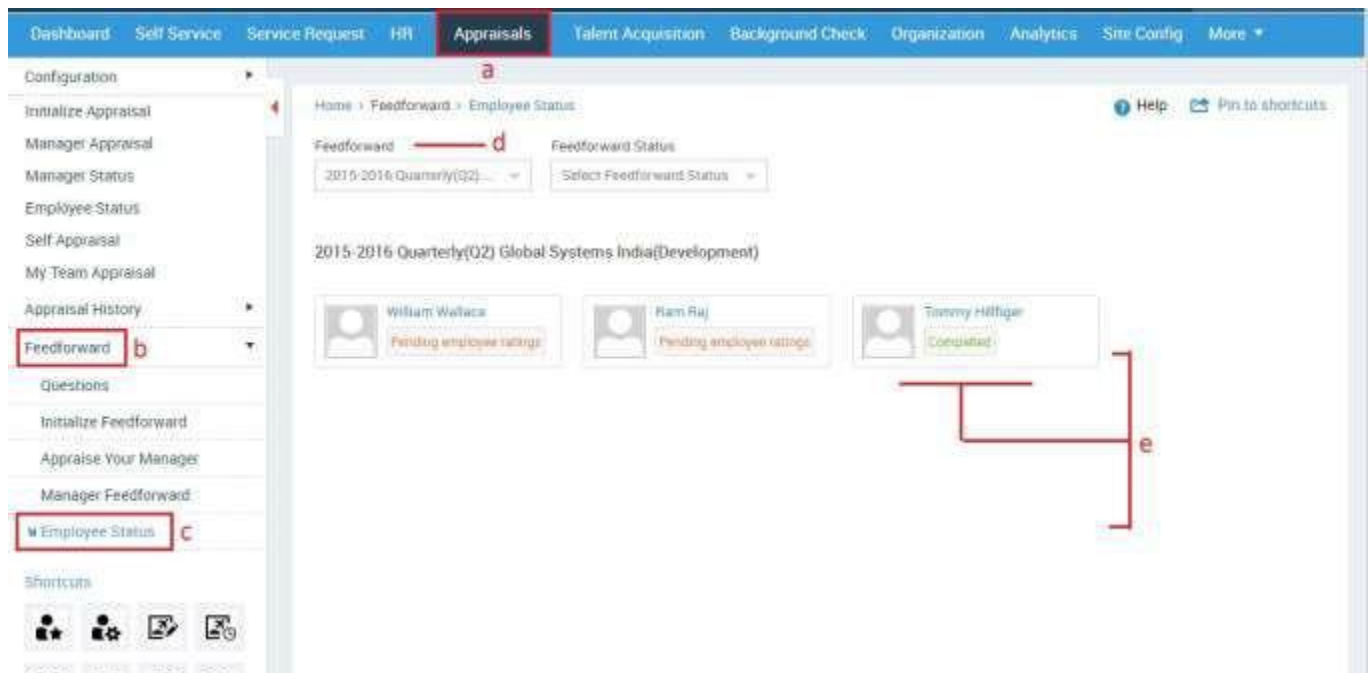


Figure 38

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

How do I view my Appraisal History?

Please refer Figure 39



Figure 39

- Click **Appraisals** in the top menu

- b. Click **Appraisal History** on the left menu panel
- c. Click **My Appraisal History** in the submenu
- d. Click **View** icon

Please refer Figure 40

The screenshot displays the 'Appraisals' section of a web application. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals (active), Talent Acquisition, Organization, Expenses, and Time. The left sidebar contains a menu with 'Manager Appraisal', 'Self Appraisal', 'My Team Appraisal', 'Appraisal History' (expanded), 'My Appraisal History' (selected), 'Team Appraisal History', and 'Feedforward'. Below the menu are shortcuts for various functions.

The main content area shows the 'View' page for a specific appraisal. It includes a breadcrumb trail: Home > Appraisals > Appraisal History > My Appraisal History > View. The employee being appraised is Jim Kerry (emp008), an Employee in the IT Department, Global Systems Business Unit. The appraisal status is 'Completed' with a due date of 09/19/16. The appraisal was conducted by Anderson Neo (L1 Manager) and Richard Son (L2 Manager), both with an appraisal rating of 2. A 'Print' button is visible in the bottom right corner.

Question	Employee Rating	Manager Rating
What is Validation? Validation	4 Advance Advance	2 Average Avg:
What is Walkthrough? Walkthrough	4 Advance Advance	2 Average Avg:

Figure 40

You can view your closed appraisal details here.

- e. Click **Print** button to print your appraisal details

How do I view my team's Appraisal History?

Please refer Figure 41



Figure 41

- Click **Appraisals** in the top menu
- Click **Appraisal History** on the left menu panel
- Click **Team Appraisal History** in the submenu
- Click **View** icon

Please refer Figure 42

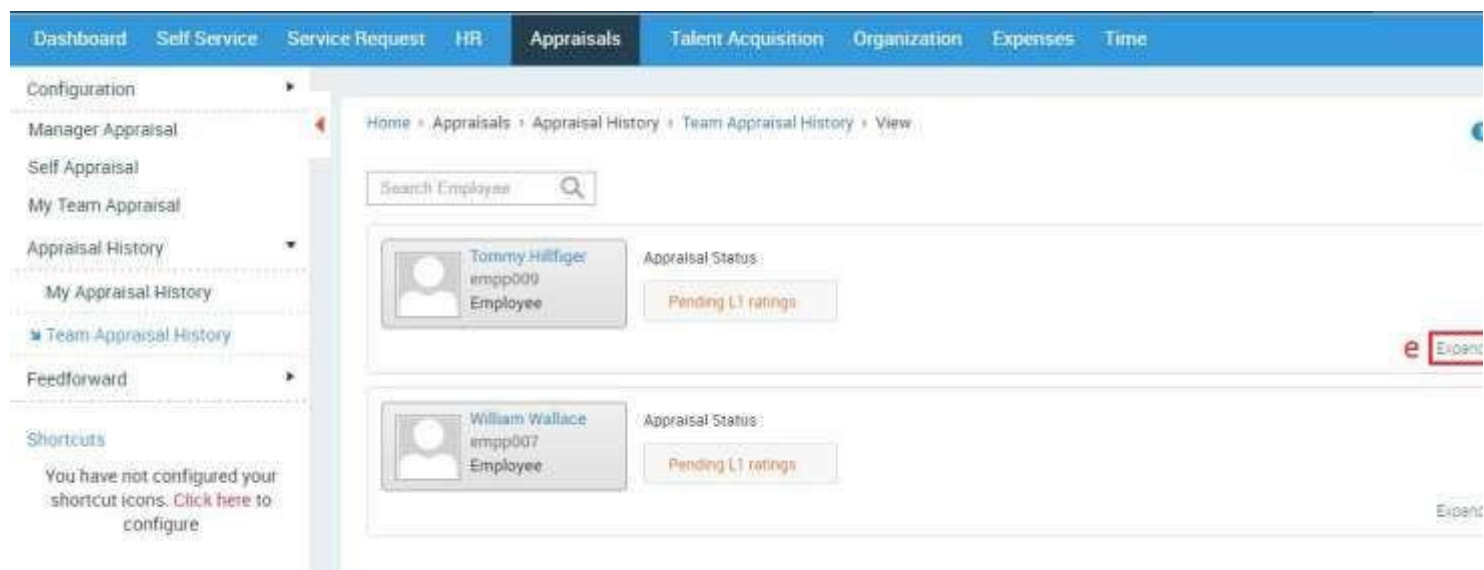


Figure 42

- Click **Expand** for any employee to view more details

Please refer Figure 43

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

Configuration
Manager Appraisal
Self Appraisal
My Team Appraisal
Appraisal History
My Appraisal History
Team Appraisal History
Feedforward
Shortcuts
You have not configured your shortcut icons. [Click here to configure](#)

Home
Appraisals
Appraisal History
Team Appraisal History
View

Search Employee

Tommy Hillfiger
empp009
Employee

Appraisal Status:
Pending LT ratings

KRA
ROI
Skill set

Question	Employee Rating	Rating	Comments
What is Validation? Validation	4 Advance Good		
What is Walkthrough? Walkthrough	4 Advance Good		
What is Agile Model? Agile	4 Advance Good		

William Wallace
empp007
Employee

Appraisal Status:
Pending LT ratings

Print

Figure 43

- f. Click **Print** to print your employees closed appraisal form