

# INSEMI TECHNOLOGY SERVICES PVT LTD

## *Goals & Reviews*

### *Design Specification*

#### REVISION HISTORY

Sl. No	Date	Description	Version No	Modify By	Approved By
1	14-Nov-22	First Issue of specification	1.0	Dinoop	Preethy
2	25-Jan-23	Renamed KPI as "Goals & Reviews". Point No. 5.1 updated. New points added under 4.2, 6.0, 6.3 & 7.0. Common requirements are added	1.1	Dinoop	Preethy
3	26 Feb 23	New Point added in 6.4. point edited in 7.0	1.2	Dinoop	Preethy
4	23 Mar 23	New Point added in 6.0 point edited in 5.2, 6.4, & 7.0	1.3	Dinoop	Preethy
5	25 May 23	New Point added in 6.0, 6.5 & 7.1. Common requirements are added	1.4	Dinoop	Preethy
6	23 Sep 2024	Migration from PHP to React. G&R will be enabled based on Appraisal list.	2.0	Dinoop	Preethy

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### ### 1. **\*\*Introduction\*\***

The Goals & Reviews system for INSEMI Technology Services is a performance management tool designed to facilitate the assignment of goals to employees, self-assessments, and manager reviews. This document outlines the design specifications for the development of this system, providing detailed information on functionalities, user interfaces, database schema, and system architecture.

### ### 2. **\*\*System Overview\*\***

The system will consist of two core modules: Goals & Reviews Assessment and Appraisal. All employees will interact with the system to submit their performance ratings, and managers and HR will provide feedback and access reports. The system will migrate from PHP to React, ensuring scalability, ease of maintenance, and improved user experience.

#### #### Users:

- **\*\*BU Heads\*\***: Can view the entire hierarchy, assign goals, and review performance.
- **\*\*Reporting Managers (RM)\*\***: Can view and review the performance of their reportees.
- **\*\*HR Team\*\***: Full access to all data and reports.

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### ### 3. **\*\*Module Details\*\***

#### #### Module 1: **\*\*Goals & Reviews Assessment\*\***

- **\*\*Owner\*\***: HR
- **\*\*Data Source\*\***: Employee data from the Employee Dashboard.
- **\*\*Access Levels\*\***:
  - BU Heads: View hierarchy, assign additional goals.
  - RM: View and review reportees' performance.

- HR Team: Full control over goals and reviews.

#### #### Module 2: \*\*Appraisal\*\*

This module will handle the entire appraisal process, including employee self-assessment and manager ratings, with data flowing to the Appraisal HR POC team.

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### ### 4. \*\*Functional Requirements\*\*

#### #### 4.1 \*\*Assigning Goals\*\*

- The system will fetch predefined goals based on employee grade (E1 to E14).
- BU Heads can assign up to 5 additional goals.
- Employees must accept assigned goals through the system.
- Both self-ratings and manager ratings will be required for each goal, with the final rating being an average of the two.

#### #### 4.2 \*\*Employee Self-Rating\*\*

- Employees will receive an email to initiate the self-rating process.
- A dropdown will allow employees to select a rating (5-Excellent, 4-Good, etc.).
- A comment section will be available for each goal.
- Employees can submit suggestions or training needs via a text field.
- Once submitted, the rating cannot be modified, and a notification will be sent to the RM.

#### #### 4.3 \*\*RM Rating\*\*

- Upon receiving the employee's self-rating, RMs will be prompted to submit their own rating and feedback.

- RMs can upload supporting documents (optional).
- Final ratings will be visible to the employee, RM, BU Head, and HR team.

#### #### 4.4 \*\*Reports and Analytics\*\*

- The HR team and module admin can download reports on a yearly basis.
- Reports will include filters by BU Name, Rating Month, Status (Completed, Pending, etc.).
- Employees and managers can see previous years' ratings and performance logs.

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#### ### 5. \*\*Non-Functional Requirements\*\*

- **Performance**: The system must support a high number of concurrent users during the appraisal cycle.
- **Scalability**: The architecture should accommodate future expansion, both in terms of users and additional functionalities.
- **Security**: All user data must be securely stored and transmitted, with role-based access control (RBAC) implemented for different user levels.

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#### ### 6. \*\*System Architecture\*\*

The system will follow a 3-tier architecture:

1. **Presentation Layer**: Built using React for a dynamic and responsive user interface.
2. **Business Logic Layer**: Handles data processing, goal assignment logic, and notifications.
3. **Database Layer**: Stores all employee data, goals, ratings, and comments.

Data will be transferred between the presentation layer and the backend via RESTful APIs.

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### ### 7. \*\*User Interface Design\*\*

#### #### 7.1 \*\*Assign Goals Page\*\*

- A page for BU Heads to assign and manage goals for employees.
- Interface includes a dropdown to select employees, the ability to add goals, and a submission button.

#### #### 7.2 \*\*My Goals Page\*\*

- A page for employees to view their assigned goals and monitor their progress.
- Contains details of each goal, including status (submitted/not submitted), and the employee's self-rating.

#### #### 7.3 \*\*Self-Rating Page\*\*

- A user-friendly interface where employees can select their self-rating and provide comments for each goal.
- Includes dropdown options for rating, comment fields, and a final submission button.

#### #### 7.4 \*\*RM Rating Page\*\*

- Allows the RM to review employees' self-ratings and submit their own feedback.
- Includes text fields for improvement suggestions and document upload functionality.

#### #### 7.5 \*\*Reports Page\*\*

- A page for HR and module admin to download performance reports filtered by various parameters like BU Name, Rating Month, etc.
- Features a view option for detailed information on ratings and comments.

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### ### 8. \*\*Database Design\*\*

#### #### Key Tables:

1. **Employees**: Contains employee information such as EmpID, Name, Grade, DOJ, and BU.
2. **Goals**: Contains predefined goals based on grades and any additional goals added by BU Heads.
3. **Ratings**: Tracks employee self-ratings, RM ratings, and overall ratings for each goal.
4. **Appraisal Log**: Stores historical appraisal data, including ratings and feedback for multiple years.
5. **Notifications**: Stores records of emails and notifications sent during the appraisal process.

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### ### 9. \*\*Security\*\*

- Implement role-based access control to limit user actions based on their role (Employee, RM, BU Head, HR).
- All data transfers will be encrypted via HTTPS.
- Sensitive data like ratings and comments will be protected using encryption both in transit and at rest.

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#### ### 10. \*\*Notifications and Emails\*\*

- Automated email notifications will be triggered at key stages (e.g., self-rating reminder, RM review notification, missed submission alerts).
- HR Admins will be copied on all communication.
- Reminder emails for employees, RM, and BU Heads will be sent weekly.

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#### ### 11. \*\*Migration from PHP to React\*\*

- The system is being migrated from a PHP-based solution to React to improve user experience, performance, and maintainability.
- The backend will remain largely unchanged, with APIs built to handle data requests from the React frontend.
- The migration will ensure the system is modular, allowing future updates with minimal disruption.

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#### ### 12. \*\*Conclusion\*\*

This design document outlines the framework for the Goals & Reviews system, which will streamline performance management for INSEMI Technology Services. By using modern technologies and ensuring security, scalability, and usability, the system will serve as an efficient tool for goal assignment, employee assessment, and appraisal management.

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Feel free to let me know if you need any further modifications!

Screenshots for Goals and Reviews:

Admin Initiation Page:

The screenshot displays the 'Admin Initiation Page' for 'Goals and Reviews' (G&R) within the 'Insight 1.1' system. The page features a top navigation bar with the following elements: a home icon, 'Dashboard', a blue 'Apps' button with a dropdown arrow, 'Company Policies' with a shield icon, 'Time Sheet' with a calendar icon, 'Help Desk' with a person icon and a dropdown arrow, 'Reports' with a circular arrow icon and a dropdown arrow, and 'Others' with a three-dot menu icon and a dropdown arrow. On the right side of the navigation bar, there are icons for a clock, a grid, a calendar, and a user profile picture. The main content area is a light gray rectangle containing a white card titled 'Initiate G&R'. This card has three input fields: 'Select Year' with a dropdown menu showing '2024', 'Select Month of Appraisal' with a dropdown menu, and 'Employee IDs' with a dropdown menu. Below these fields is a prominent blue 'SUBMIT' button. At the bottom left of the page, a footer line reads: '© 2024. Insight v1.1 by Insemi Technology Services Pvt Ltd.'

Admin Reports Page:

Insight 1.1

Dashboard

Apps

Company Policies

Time Sheet

Help Desk

Reports

Others

Search by User Empid

USER NAME	USER EMPID	REPORTING MANAGER	KPI DATA	EMPLOYEE RATING AVERAGE	REVIEWER RATING AVERAGE	ACTION
Hrishav Chakraborty	INI40	dinoop.mathew@insemitech.com	Willingness to Learn & Re-skilling, Self-reliant on assigned task, Attitude and alignment on company culture...	3	3	REPORTS
Santhosh Ajayakumar	IN107	dinoop.mathew@insemitech.com	Technical know-how of Project, Self-reliant on assigned task, Attitude and alignment on company culture...	4.5	3.3333333333333335	REPORTS

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RM Rating Page:

Insight 1.1

Dashboard

Apps

Company Policies

Time Sheet

Help Desk

Reports

Others

Rating Pending

Window Inactive

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RM Reports Page:

Insight 1.1

Dashboard

Apps

Company Policies

Time Sheet

Help Desk

Reports

Others

USER NAME	USER EMPID	REPORTING MANAGER	KPI DATA	EMPLOYEE RATING AVERAGE	REVIEWER RATING AVERAGE	ACTION
Hrishav Chakraborty	INI40	dinoop.mathew@insemittech.com	Willingness to Learn & Re-skilling, Self-reliant on assigned task, Attitude and alignment on company culture...	3	3	REPORTS
Santhosh Ajayakumar	IN107	dinoop.mathew@insemittech.com	Technical know-how of Project, Self-reliant on assigned task, Attitude and alignment on company culture...	4.5	3.3333333333333335	REPORTS

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Employee Goals Page with Submission Window Section:

Insight 1.1

Dashboard

Apps

Company Policies

Time Sheet

Help Desk

Reports

Others

CURRENT YEAR GOALS

VIEW HISTORY

Technical know-how of Project

Self-reliant on assigned task

Attitude and alignment on company culture

Support on hiring process

Process Adherence

Achieving Deadline

GOALS AND REVIEWS FOR THIS YEAR

Submission Window Inactive

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# Employee Reports History Page

Insight 1.1

Dashboard

Apps

Company Policies

Time Sheet

Help Desk

Reports

Others

ACTION	EMPLOYEE STATUS	REVIEWER STATUS	USER NAME	USER EMPID	REPORTING MANAGER	RATING OPEN TILL	WINDOW MONTH	KPI DATA
REPORTS	Pending	Pending	Dinoop Mathew	IN210	preethy.paul@insemit...	10/09/2024	July	Technical know-
REPORTS	Completed	Completed	Dinoop Mathew	IN210	preethy.paul@insemit...	11/09/2023	July	Technical know-

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