

User Journey & Process Flow Document: Performance Appraisal System - Version 0.1.1

1. System Overview and Roles

The **Sonali Intellect Human Resource Management System (HRMS)** - “**HR ORBIT**” facilitates core HR functions, with a strong focus on a multi-level **Performance Appraisal** process. The system involves two primary user roles: the **Admin/HR/Superuser** (also referred to as the Django System Admin) and the **General Employee User**.

- **Admin/HR/Superuser:** This role is responsible for the initial system setup, including superuser account creation and **employee profile creation**. They manage system configurations like **Departments, Designations, Grades and Roles & Permissions**. Crucially, they define the employee **Role and Hierarchy** and can see and edit every employee's appraisal (all 6 stages).
 - **General Employee User:** This role focuses on daily interaction, including accessing the **Dashboard**, managing their profile, conducting a **self-assessment** during the assigned appraisal window, and viewing their final appraisal.
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2. Admin/HR Superuser Journey & Process Flow

This section details the setup, configuration, and HR-specific tasks managed by the Admin/HR/Superuser (Django System Admin).

A. Initial System Setup

The process begins with the **Django Superuser Creation** using a "no-reply" email address. Once the superuser credentials are created, they are provided to the Stakeholder. The Stakeholder then logs in via the Login Portal. As an **Optional Password Change**, the Stakeholder can update the superuser password, which includes a mandatory **strong password validation check**.

B. Employee Creation and HR Configuration

The Superuser or HR begins by creating a new employee profile through the HRMS (HR ORBIT) interface, typically under the **Employees → + Add New** menu. Next, the Superuser/HR/Admin defines the employee's **Role** and establishes the multi-level **Employee Hierarchy** (e.g., Reporting Manager, HR, HOD, COO, CEO).

This setup triggers the **Account Creation Notification**: the system sends an **Email Notification to the Employee** with their login credentials (email ID and auto-generated password). Concurrently, the **Employee information is stored in the Database**.

C. HR Appraisal Role

As part of the review process, the **HR performs their review role and inputs the salary details**. This is the dedicated HR part of the appraisal process. Finally, for records management, once the multi-level review is complete and the **CEO Approval is received**, the **HR user can download the Final Appraisal PDF for every employee**.

Moreover, HR can view & edit every employee's appraisal from the **"All Appraisals"** page.

3. General Employee User Journey & Process Flow

This flow details the typical actions and access privileges for a General Employee User within the HRMS (HR ORBIT).

A. Login and Profile Management

The journey starts when the User receives an email with login credentials and performs their **First Login** via the designated Login portal. They are then immediately redirected to their **Dashboard**, where key information like **Leave Highlights and Attendance Highlights** is viewable. The user has the **Optional Password Change** feature via the **Change Password** section, which consistently performs a **strong password validation check**. Users can also **Access Profile** to update their employee details (Personal Details, Address, Work Experience, Education, Training, Other Info) via the **My Profile** menu.

B. Performance Appraisal Process

The core of the process is the conditional performance appraisal, which is governed by a set appraisal timer.

- **Appraisal Window Check:** The system first checks if it is the employee's appraisal time. The **My Appraisal form is opened for edit (create) access** only during this window; otherwise, the user will have view access to an empty form if it's his appraisal time but hasn't submitted the form yet, otherwise will have view access to the previously submitted appraisal form.
- **Appraisal Timer Logic:** The system **triggers** an event **sets timer** for self-assessment which opens the **My Appraisal Form's edit access** based on the the **Date of Joining (DOJ)**:

- **DOJ ≤ March 31, 2023:** The **Appraisal Period** is set from **March 1 to March 31**. The **Start Date** is **March 1**, the **Reminder Date** is **March 15**, and the **End Date** is **March 31**.
- **DOJ > March 31, 2023:** The **Appraisal Period** is approximately **30 days** from the DOJ. The **Start Date** is the **1st day of the joining month**, the **Reminder Date** is the **start date + 14 days**, and the **End Date** is the **start date + 29 days**.
- **Self-Assessment and Review Chain:** The employee then completes and submits the **Self Appraisal** form. This action initiates the **Review Chain**, moving the appraisal document to the **Review Appraisals** page for the next level of the hierarchy. The document flows through the entire hierarchy: **Reporting Manager → HR → HOD → COO → CEO** (for final approval). Each reviewer reviews, provides remarks, and submits their feedback. The **“Appraisal Status” page is updated for every submission** and is viewable by every user.
- **Final Appraisal Availability:** Once the **CEO approves the appraisal (Approved by CEO)**, the employee's **download option on the My Appraisal form is activated**. The **Status Update** is finalized on the **“Appraisal Status” Page**, viewable by everyone, but only **HR can download the completed appraisal** of every employee.

N.B: The **Appraisal Status** page shows appraisal status for **currently active** appraisal's status in that **month**.

4. Logout Mechanism

The system supports two mechanisms for ending a user session:

- **Manual Logout:** Any user or admin can manually log out of the system.
- **Automatic Logout:** The system is configured to **automatically log out the user after 60 minutes (1 hour)** of inactivity.