

# User Journey & Process Flow Document: Performance Appraisal System - Version 0.1

## 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, and Grades**. Crucially, they define the employee **Role and Hierarchy** and manage the final appraisal document download.
  - **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. If the user is designated as HR, they have specific edit access to key organizational fields, allowing them to create or edit **Employee, Department, Designation, and Grade** records. 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 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 will be the only one who can download the Final Appraisal PDF for every employee**.

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## 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 access** only during this window; otherwise, the user will have view access to an empty 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 **DOJ**, the **Reminder Date** is **DOJ + 14 days**, and the **End Date** is **DOJ + 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 **Other Appraisals** page for the next level of the hierarchy. The document flows through the entire hierarchy: **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.
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## 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.