**t -Retail**

**Digital Banking**

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**HR ORBIT**

**Sonali Intellect Limited**

**, Bangladesh**

BUSINESS PROCESS DOCUMENT OF PERFORMANCE APPRAISAL

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**1. Introduction**

* **Purpose:** The purpose of this document is to outline the business process for the Performance Appraisal system for Sonali Intellect Limited. It details the current (manual) and proposed (automated) workflows to ensure clarity, efficiency, and consistency in the performance review process.
* **Scope:** This BPD covers the entire performance appraisal lifecycle, from the employee's self-assessment to the final approval by the CEO. It includes the roles of the employee, reporting manager, HR, HOD, COO, and CEO.

## 2. Roles and Responsibilities

* **Admin (HR):** Manages the system, creates user accounts, sets employee hierarchies, and has the capability to download employee details and completed forms. They also have access to the administrative panel to manage departments, designations, and grades.
* **Employee:** Fills out their self-appraisal form, can update their profile information, and can view the remarks from all subsequent reviewers.
* **Reporting Manager:** Reviews and provides feedback on the employee's performance and sets goals for the next year. They can also view their own appraisal form.
* **HR:** Validates the reviews, inputs salary details which are auto-calculated, and makes promotion/increment recommendations using a decision table. They also have access to the administration panel.
* **HOD, COO, CEO:** These are subsequent levels of approval in the hierarchy. They review the form, provide remarks, and make decisions regarding promotion or increment.

## 3. Current Business Process (Manual)

* **Process Description:** The current process for performance appraisal is manual, likely involving physical forms. The workflow is sequential, with forms being physically handed off from one person to the next.
* **Problem with current process:** This manual process is prone to delays, data entry errors, and a lack of transparency. Tracking the status of an appraisal form is difficult.
* **Workflow:**
  1. HR distributes physical or digital appraisal forms to employees.
  2. Employee fills out the self-appraisal form.
  3. Employee submits the form to the Reporting Manager.
  4. Reporting Manager reviews the form, adds their comments, and forwards it to HR.
  5. HR reviews the form, manually calculates salary details, and forwards it to HOD.
  6. The form goes through subsequent approvals from HOD, COO, and CEO.
  7. After final approval, HR manually updates the employee's records and payroll.

## 4. Proposed Business Process (Automated)

* **Process Description:** The proposed process automates the performance appraisal workflow using a web-based system, HR Orbit. This system ensures a standardized process, provides real-time tracking, and automates calculations and notifications. The entire system is built on a web application with role-based access control to ensure that users can only access information and functionalities relevant to their roles.
* **Key Improvements:**
  + **Automation:** The system automatically calculates gross salary and increment based on the basic salary entered by HR. It also auto-generates remarks on leave and late attendance.
  + **Notifications:** Automated notifications are sent to the next reviewer in the hierarchy when a form is submitted. Notifications are also sent one week before the form submission deadline to remind employees and managers.
  + **Access Control:** Access is strictly role-based. The Admin has full administrative control, while employees and managers have limited access to their own information and the forms they are responsible for. After a form is submitted, it becomes read-only for the submitting user.
  + **Audit Trail:** The system maintains a complete history of all reviews, decisions, and data modifications, ensuring transparency and accountability.
  + **Data Accuracy:** Minimizes data entry errors with automated calculations and pre-filled fields from the employee repository.

**General Workflow:**

1. **System Initialization:** The Admin (HR) sets up employee accounts and defines the appraisal hierarchy for each employee.
2. **Employee Self-Appraisal:** The employee logs in updates their profile and completes their self-appraisal form.
3. **Manager Review:** The Reporting Manager receives a notification, logs in, reviews the employee's self-appraisal, and provides their feedback and ratings.
4. **HR Review:** HR receives the form, validates the review, and inputs salary data, triggering automated calculations. They also make promotion/increment recommendations.
5. **Hierarchical Approval:** The form progresses sequentially through the HOD, COO, and CEO for final review and approval.
6. **Finalization:** After the CEO's final approval, the process is complete. The HR can then download the finalized form as a PDF document.

## 5. User Journeys (A User Guide)

This section provides a detailed, step-by-step guide for each user role, outlining their interactions with the HR Orbit system.

### A. Admin (HR) Journey

This guide outlines how an Admin uses the system for initial setup and management.

* **Step 1: Login**
  + Navigate to the HR Orbit login page.
  + Enter your **Username** and **Password**.
* **Step 2: Access the Admin Panel**
  + From the dashboard, locate and click the "Admin Panel" link. This panel is exclusive to this role.
* **Step 3: Create a New Employee**
  + Select the "Create Employee" option.
  + Fill in all mandatory data fields: **Employee ID, Name, Designation, Department, Joining Date, Grade, Salary, Reporting Manager,** and **Password**.
* **Step 4: Set Appraisal Hierarchy**
  + For each new employee, define their specific appraisal hierarchy. This sets the sequence for all future review and approval steps (e.g., Employee -> Reporting Manager -> HR -> HOD -> COO -> CEO).
* **Step 5: Manage Organizational Data**
  + Use the Admin Panel to manage and update master data like departments, designations, and grades as needed.
* **Step 6: Download Documents**
  + Once an appraisal cycle is complete, you can download the final, signed-off appraisal form as a PDF document for your records.

### B. Employee Journey

This guide outlines how an employee completes their annual self-appraisal.

* **Step 1: Login**
  + Log in to the HR Orbit system using the credentials provided by your HR Admin.
* **Step 2: View Dashboard**
  + The dashboard will display employee’s personal profile and the Performance Appraisal form.
* **Step 3: Update Profile Information**
  + Click on the profile to edit specific fields such as **Responsibilities, Previous Work Experience, Educational Qualifications,** and **Professional Certificates**, can also upload signature and a profile picture. The system will automatically calculate the total work experience.
* **Step 4: Fill Out Employee Self Appraisal Form**
  + Click to open the performance appraisal form, which is auto-generated for the current year.
  + Complete the self-appraisal section, detailing your **achievements, goal completion,** and proposed **training and development plan**.
* **Step 5: Submit the Form**
  + Once submitted, the form becomes read-only for the employee, and a notification is sent to your Reporting Manager.
* **Step 6: View Final Results**
  + After the entire review process is complete and the CEO has approved the form, the employee can log in to view the final, completed form and all reviewer remarks.

### C. Reporting Manager Journey

This guide outlines how a manager reviews and provides feedback on their direct report's performance.

* **Step 1: Receive Notification**
  + Reporting Manager will receive an notification when one of his/her direct reports submits their appraisal form.
* **Step 2: Access the Review Form**
  + Log in to the dashboard. The right-hand panel will display a list of pending review forms for the supervisees.
  + Click on the relevant form to open it.
* **Step 3: Provide Feedback**
  + Review the employee's self-appraisal. Reporting Manager can only edit the sections designated for this role.
  + Provide comments on the employee's **achievements, goals,** and **training plans**.
  + Provide an **overall assessment** and **remarks** on the employee's performance and potential.
* **Step 4: Submit the Form**
  + Click the "Submit" button. The form will then be sent to the HR department for the next stage of review, and an email notification will be sent.

### D. HR Journey

This guide outlines the steps for the HR role in validating and finalizing the review.

* **Step 1: Receive Notification**
  + HR will receive an email notification when a form is submitted for hr review.
* **Step 2: Access the Review Form**
  + Log in and access the review form from the dashboard. The form will be pre-filled by both the employee and their Reporting Manager. The system will also automatically populate data for **total leave taken** and **late attendance**.
* **Step 3: Input Salary Data**
  + Enter the employee's **basic salary**. The system will automatically calculate the **gross salary** and **increment** based on this input.
* **Step 4: Make Recommendations**
  + Use the **decision table** on the form to make recommendations for promotion or increment.
* **Step 5: Submit the Form**
  + Submit the form to send it to the next reviewer in the hierarchy (e.g., the HOD).

### E. HOD, COO, and CEO Journey

This guide outlines the final steps for senior management in the approval process.

* **Step 1: Receive Notification**
  + Each reviewer receives an notification when the form is submitted to them.
* **Step 2: Review the Form**
  + Log in and open the form. Reviewer can view all previous sections and remarks from the employee, manager, and HR.
* **Step 3: Finalize Decision**
  + Reviewer can only add their own comments and use the **decision table** to make final decisions on promotion and increment.
* **Step 4: Approve**
  + The CEO's final approval marks the completion of the appraisal process.

## 6. System Interfaces and Data Fields

* **Login Page:** Provides secure login with fields for **Username** and **Password**, along with a **Forgot Password** functionality.
* **Dashboard:** Offers a role-based view with a **left panel** for forms, a **middle section** to display content, and a **right panel** to show pending reviews.
* **Data Fields:** The system will use data fields from the “Data Feild Parameter\_Performance Appraisal\_HR Orbit.pdf file”, including employee information, performance metrics, and decision tables.

## 7. Notifications and Deadlines

* The system sends notifications to the next level of the hierarchy when a form is submitted.
* Notifications are sent one week before the submission due date.
* After the deadline, the form's view and edit access will be locked from further changes.

## 8. Conclusion

The automated performance appraisal system will streamline the current manual process, providing a more efficient, transparent, and accurate workflow. By implementing this system, Sonali Intellect Limited can improve the overall employee performance management experience, ensure timely reviews, and maintain a comprehensive and accurate record of all appraisal activities.