

# TRAINING ON HR PMS

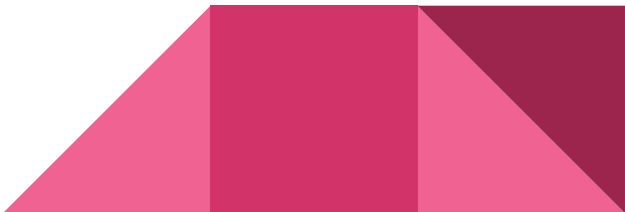
APPRAISEE, APPRAISERS/REVIEWERS PROCESS

## OBJECTIVES

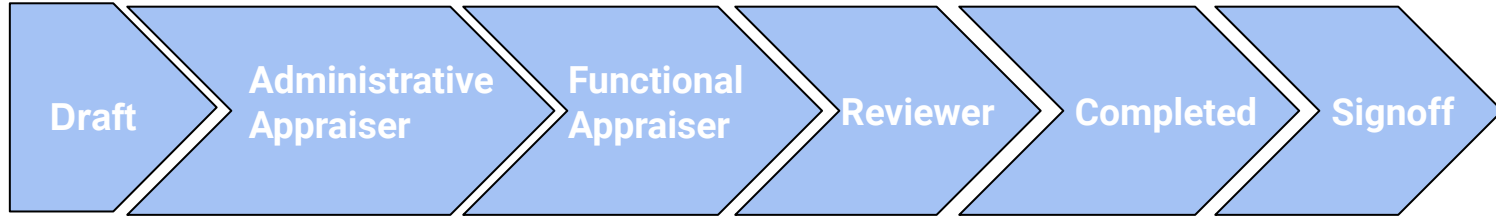
At the end of the training, the participants(Appraisees) should be able to:

1. Login to Odoo System.
2. Locate and open HR PMS Module.
3. Open their Appraisal.
4. View their Information.
5. Read up Instructions.
6. Add their achievements and Rate themselves.
7. Submit their appraisal.
8. Follow the appraisal progress and check their performance.
9. Comment and add attachment after appraisal ratings.
10. Log out of the system.

Additionally, participants(Appraisers/Reviewers) should be able to:

1. Navigate to the appraisals of their appraisees.
  2. Rate their appraisees
  3. Write comment on their appraisees.
  4. Finally submit their rating.
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# APPRAISAL PROCESS WORKFLOW



Draft - Newly published

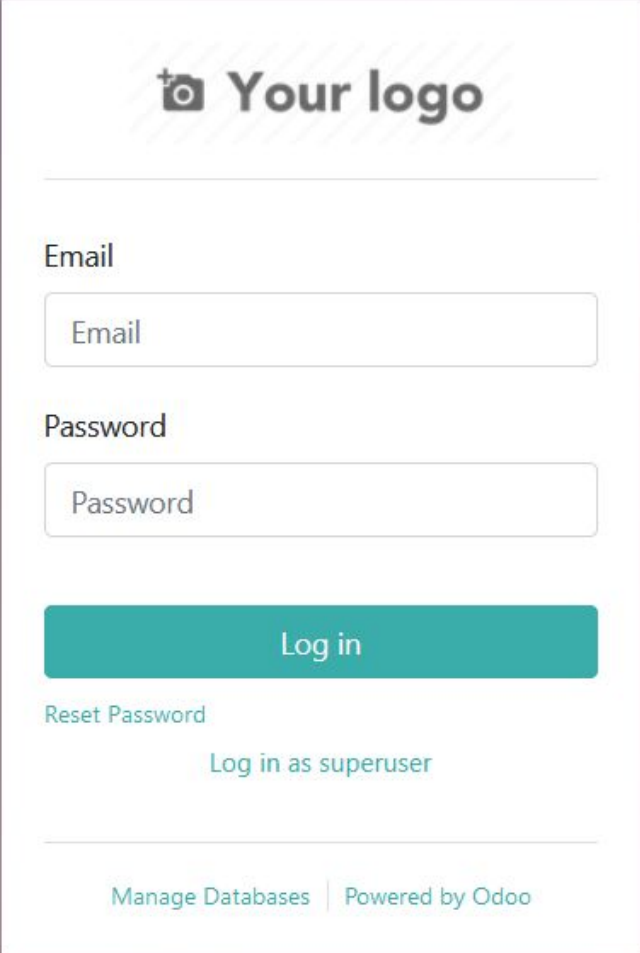
Completed - Have been appraised and Reviewed

Sign off - Appraisee have done the perception rating

# LOGGING INTO ODOO SYSTEM

- ★ Open the Browser.
- ★ Type the url <http://hrpms.myeedc.com:8069> in the address bar.
- ★ Put your email address and your password (Some staff will use their staff number instead of email).
- ★ Click Login.

**Note:** Password will be sent through your email beforehand.



The screenshot shows the Odoo login page. At the top, there is a placeholder for a logo with a camera icon and the text "Your logo". Below this is a horizontal line. The "Email" section has a label "Email" and a text input field containing the placeholder text "Email". The "Password" section has a label "Password" and a text input field containing the placeholder text "Password". Below the password field is a teal "Log in" button. Underneath the button are two links: "Reset Password" and "Log in as superuser". At the bottom of the page, there is a footer with the links "Manage Databases" and "Powered by Odoo".

# LOCATING AND OPENING HR PMS MODULE

1. Click the icon with  
name HR PMS



Discuss



HR PMS



Employees



1

## DRAFT STATE : APPRAISEE PROCESS >>

# Opening the Appraisal

1. Click the top item on the draft column with your name and wait for it to load.

The screenshot shows the HR PMS Appraiser interface. The top navigation bar includes the HR PMS logo and several tabs: Appraisal, Administrative Appraisal(s), Functional Appraisal(s), and Appraisal(s) for Review. The user's name, Ilo chidimma ifunanya, is displayed in the top right corner. The main content area is titled 'Appraiser' and features a search bar, filters, and a 'Group By' option. The 'Draft' column is highlighted, and a red arrow points to it with the text 'Draft column'. Below the 'Draft' column, a list of appraisals is displayed, with a red arrow pointing to the first item, which is labeled '1'. The first appraisal entry shows the name 'ILO CHIDIMMA IFUNANYA' and other details.

**Draft column**

**1**

**Note:** When you open HR PMS module, it automatically opens this page. This default view is called kaban view.

# READING UP INSTRUCTION

1. Read the instructions carefully.

Note: Instruction tab automatically shows up when you open appraisal.

Appraisee / Junior Management Positions: - ILO CHIDIMMA IFUNANYA

EDIT

SUBMIT SEND MAIL REMINDER DRAFT ADMINISTRATIVE APPRAISER FUNCTIONAL APPRAISER REVIEWER COMPLETED

## Junior Management Positions: - ILO CHIDIMMA IFUNANYA

Period Annual Appraisal Cycle 2022 Date From 01/10/2022  
Deadline Date 30/05/2023 Date End 31/12/2022  
Submitted Date 28/04/2023 14:14:31

1

Instructions Staff Profile Sections Appraisee's Comment Return Comment(s)

### Section A: KEY RESULTS AREAS (KRAs) / ACHIEVEMENTS

Instructions: KRA / Achievement Ratings - Please use the following Rating Guidelines (1 to 4 scale, where 4 is the HIGHEST rating)

(1) Unsatisfactory Mostly unable to meet quality, timelines & targets. Requires high supervision / guidance. Little cost conscious in planning & execution	(2) Below Expectation Many times, unable to meet quality, timelines and targets. Requires close supervision / guidance. Not much cost conscious in planning & execution	(3) Meets Expectation Quality, Timelines & targets are mostly met. Cost optimization done mostly. Requires little supervision.	(4) Outstanding Highest quality of work. Targets & Timelines always met. Cost optimization in execution. Hardly needs supervision.
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### Section B: FUNCTIONAL COMPETENCIES: to be filled by CURRENT Functional Appraiser along with comments

Instructions: Functional Competencies Ratings: Please TICK the most appropriate column using the following Rating Guidelines

Rating &	Novice (1)	Basic (2)	Intermediate (3)	Advanced (4)	Expert (5)
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# CHECKING YOUR INFORMATION

★ Go through the “Staff Profile” Tab to check your:

I. personal informations

II. Functional Appraiser

III. Reviewer

If information does not correspond, Contact the HR Officer

eedctalentmanagment@enugudisco.com

## Junior Management Positions: - ILO CHIDIMMA IFUNANYA

Period	Annual Appraisal Cycle 2022	Date From	01/10/2022
Deadline Date	30/05/2023	Date End	31/12/2022
		Submitted Date	28/04/2023 14:14:31

Staff Profile

Instructions	Staff Profile	Sections	Appraisee's Comment	Return Comment(s)
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Appraisee's Personal Information (employee must have worked for minimum 6 months in the appraisal period)

Employee	ILO CHIDIMMA IFUNANYA	Staff ID	64039
Function	DHR OFFICER	Designation	DHR OFFICER
Department	HUMAN RESOURCES	Unit/SC/Workshop	DISTRICT OFFICE
District	EKWULOBIA	/Substation	

Current Functional Appraiser's (should have supervised appraisee for minimum 3 months) Personal Information



# ADDING ACHIEVEMENT AND RATING YOURSELF I

1. Navigate to sections by clicking on the “Section” tab
2. Click the edit button at the top of the page.

Appraisee / Junior Management Positions: - ILO CHIDIMMA IFUNANYA

EDIT

SUBMIT

SEND MAIL REMINDER

DRAFT

ADMINISTRATIVE APPRAISER

FUNCTIONAL APPRAISER

REVIEWER

COMPLETED

## Junior Management Positions: - ILO CHIDIMMA IFUNANYA

Period Annual Appraisal Cycle 2022  
Deadline Date 30/05/2023

Date From 01/10/2022  
Date End 31/12/2022  
Submitted Date 28/04/2023 14:14:31

Instructions

Staff Profile

Sections

Appraisee's Comment

Return Comment(s)

### SECTION (A) - KRA / Achievement(s)

\* Instructions: Rating scale is 1 (Lowest rate) to 4 scale, where 4 is the HIGHEST rating

Description

Weight (To...

Self Rat...

AA Rati...

FA Rating

Review...

Weighte...

Note: KRAs and Achievement must have minimum number of 5 and maximum number of 7.

# ADDING ACHIEVEMENT AND RATING YOURSELF II

1. Click on add lines to add new blank lines.
2. Put the Achievement in the "Description" column.
3. Enter the achievement weight(between 5 - 25 in the weight column.
4. Enter your self rate in the self rate column.
5. Click on add line to repeat till you get to 5 to 7 lines and total weight of 100.
6. Click on "Save" Button to save at intervals and at the end.

**HR PMS**   Appraisal   Administrative Appraisal(s)   Functional Appraisal(s)   Appraisal(s) for Review

Appraisee / Junior Management Positions: - ILO CHIDIMMA IFUNANYA

**SAVE**   **DISCARD**

**CHIDIMMA IFUNANYA**

Period: Annual Appraisal Cycle 2022   Date From: 01/10/2022  
Deadline Date: 30/05/2023   Date End: 31/12/2022  
Submitted Date: 28/04/2023 14:14:31

Instructions   Staff Profile   **Sections**   Appraiser's Comment   Return Comment(s)

**SECTION (A) - KRA / Achievement(s)**

\* Instructions: Rating scale is 1 (Lowest rate) to 4 scale, where 4 is the HIGHEST rating

Description	Weight (Total 100%)	Self Rating	AA Rating	FA Rating	Reviewer Ratings	Weighted (%) Score of specific KRA
	0.00	0	0	0	0	0.00
<a href="#">Add a line</a>						
	0.00					

**Functional Competency Sections**

\* Instructions: Rating scale is 1 (Lowest rate) to 4(Highest) scale

Description	Weight (Total 100%)	AA Rating	FA Rating	Reviewer Ratings	Section Scale	Weighted (%) Score of specific FC
Functional Competency Knowledge	50	0	0	0	5	0.00

hrpms.myedc.com:8069/web# |

You cannot exceed maximum lines and all weights must sum together to 100


# Submitting the Appraisal

1. Click on the Submit Button.

Result: Workflow moves to Functional Appraiser or Administrative Appraiser

**Note: If any field is added incorrectly, system will throw validation dialog. Kindly read the validation message and take corrections appropriately before trying to submit again.**

Appraisee / Junior Management Positions: - ILO CHIDIMMA IFUNANYA

EDIT  1

SUBMIT SEND MAIL REMINDER DRAFT ADMINISTRATIVE APPRAISER FUNCTIONAL APPRAISER REVIEWER COMPLETED

## Junior Management Positions: - ILO CHIDIMMA IFUNANYA

Period Annual Appraisal Cycle 2022  
Deadline Date 30/05/2023  
Date From 01/10/2022  
Date End 31/12/2022  
Submitted Date 28/04/2023 14:14:31

Instructions Staff Profile Sections Appraiser's Comment Return Comment(s)

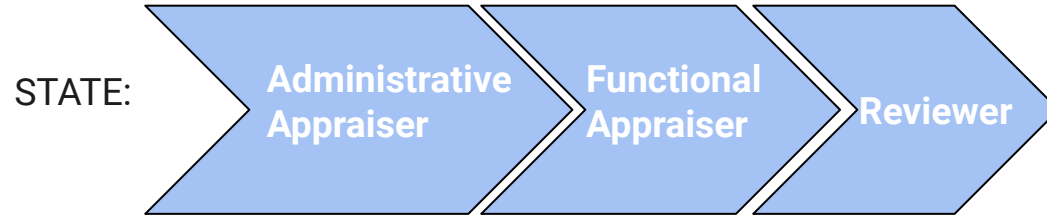
### SECTION (A) - KRA / Achievement(s)

\* Instructions: Rating scale is 1 (Lowest rate) to 4 scale, where 4 is the HIGHEST rating

Description	Weight (Total 100%)	Self Rating	AA Rating	FA Rating	Reviewer Ratings	Weighted (%) Score of specific KRA
Achievement 1	20.00	4	0	0	0	0.00
Achievement 2	20.00	4	0	0	0	0.00
Achievement 3	20.00	4	0	0	0	0.00
Achievement 4	20.00	4	0	0	0	0.00
Achievement 5	20.00	4	0	0	0	0.00
	100.00					

Functional Competency Sections

## APPRAISER/REVIEWER PROCESS >>



STATE: Administrative Supervisor, Functional Supervisor or Reviewer

Abbreviated as:

AA - Administrative Appraisal.

FA - Functional Appraisal.

FR - Functional Reviewer also referred to as Reviewer

# APPRAISER'S/REVIEWER'S VIEW

1. Appraisers  
depending on their  
role(s) click among  
these menu:
  - a. Administrative  
Appraisal(s).
  - b. Functional  
Appraisal(s).
  - c. Appraisal(s)  
for Review.
2. Double click one of  
the appraisals in the  
list view.

The screenshot shows the HR PMS interface. The top navigation bar includes 'Appraisal', 'Administrative Appraisal(s)', 'Functional Appraisal(s)', 'Appraisal(s) for Review', and 'Department templates'. Red arrows labeled 'a', 'b', and 'c' point to these three menu items respectively. Below the navigation bar, the 'Functional Appraisal' section is active, showing a list of appraisals. A red arrow labeled 'Appraisals' points to the 'Department' column header. Another red arrow labeled 'The current state' points to the 'Status' column header. The table lists two appraisals for 'Igwe-orji constance ngozi' and 'Ogonuwe chioma joy', both in 'HUMAN RESOURCES' department, with a score of 33.60 and 36.00 respectively, and status 'Functional Appraiser'.

<input type="checkbox"/> Employee	Department	Period	Deadline	Overall Score	Status
<input type="checkbox"/> Igwe-orji constance ngozi	HUMAN RESOURCES	April 2023 (Quarterly)		33.60	Functional Appraiser
<input type="checkbox"/> Ogonuwe chioma joy	HUMAN RESOURCES	April 2023 (Quarterly)		36.00	Functional Appraiser

# CORRECTING ACHIEVEMENTS AND WEIGHTAGE

Functional Appraiser can

- ★ Enter correct weightage in the “Functional Appraiser” column.

HR PMS Appraisal Administrative Appraisal(s) Functional Appraisal(s) Appraisal(s) for Review Department templates

Functional Appraisal / Junior Management Positions: - IBEH JANEFRANCES KELECHI

EDIT

SUBMIT RATING RETURN SEND MAIL REMINDER DRAFT ADMINISTRATIVE APPRAISER FUNCTIONAL APPRAISER REVIEWER COMPLETED

### Junior Management Positions: - IBEH JANEFRANCES KELECHI

Period Annual Appraisal Cycle 2022 Date From 01/10/2022  
Deadline Date 30/05/2023 Date End 31/12/2022  
Appraisal From 01/10/2022 01:00:00

Instructions Staff Profile Sections Score Details Manager's Comment Appraisal Comment(s) Return Comment(s)

#### SECTION (A) - KRA / Achievement(s)

\* Instructions: Rating scale is 1 (Lowest rate) to 4 scale, where 4 is the HIGHEST rating

Description	Weight (Total 100%)	FA Weight (Total 100%)	Self Rating	AA Rating	FA Rating	Reviewer Ratings	Weighted (%) Score of s...
Achievement 1	20.00	0.00	4	4	0	0	0.00
Achievement 2	20.00	0.00	4	4	0	0	0.00
Achievement 3	20.00	0.00	4	4	0	0	0.00
Achievement 4	20.00	0.00	4	4	0	0	0.00
Achievement 5	20.00	0.00	4	4	0	0	0.00
	100.00	0.00					

Functional Competency Sections

Functional Appraiser Weight

# RATING APPRAISEE: KRA AND ACHIEVEMENTS

1. Navigate to the "Sections" tab.
2. Click Edit Button.
3. Double click on the cells under appropriate column and add scores.

Note: Score range shown in the instruction.

Administrative Appraisal / Junior Management Positions: - ILO CHIDIMMA IFUNANYA

**EDIT** ← **Edit Button**

**SUBMIT RATING** **SEND MAIL REMINDER** **DRAFT** **ADMINISTRATIVE APPRAISER** **FUNCTIONAL APPRAISER** **REVIEWER** **COMPLETED**

## Junior Management Positions: - ILO CHIDIMMA IFUNANYA

**Period** Annual Appraisal Cycle 2022  
**Deadline Date** 30/05/2023  
**Date From** 01/10/2022  
**Date End** 31/12/2022  
**Submitted Date** 05/05/2023 01:00:00

**Instructions** **Staff Profile** **Sections** **Score Details** **Admin Appraiser's Comment** **Appraisal Comment(s)** **Return Comment(s)**

**SECTION (A) - KRA / Achievement(s)**  
\* Instructions: Rating scale is 1 (Lowest rate) to 4 scale, where 4 is the HIGHEST rating

Description	Weight (Total 100%)	Self Rating	AA Rating	FA Rating	Reviewer Ratings	Weighted (%) Score of specific KRA
Achievement 1	20.00	4	0	0	0	0.00
Achievement 2	20.00	4	0	0	0	0.00
Achievement 3	20.00	4	0	0	0	0.00
Achievement 4	20.00	4	0	0	0	0.00
Achievement 5	20.00	4	0	0	0	0.00
	100.00					

Functional Competency Sections

**Administrative Appraiser**  
**Functional Appraiser**  
**Reviewer**

# RATING APPRAISEE: FUNCTIONAL COMPETENCIES AND LEADERSHIP COMPETENCIES

1. Scroll down to FC and LC sections.
2. Double click on the cells under the appropriate column and give score.

**Note: Score range shown in the instruction.**

Functional Competency Sections

\* Instructions: Functional Competencies Ratings: Please TICK the most appropriate column using the following Rating Guidelines (1 to 5 scale, where 5 is the HIGHEST rating)

Description	Weight (Total 100%)	AA Rating	FA Rating	Reviewer Ratings	Section Scale	Weighted (%) Score of specific FC
Functional/Process Knowledge	50	4	0	0	5	12.00
Functional Skills	50	4	0	0	5	12.00

Adm. Appraiser    Func. Appraiser    Reviewer

Leadership Competency Sections

\* Instructions: Leadership Competency Ratings: Please use the following Rating Guidelines (1 to 5 scale). All LC have equal weightage

Description	Weight (Total 100%)	AA Rating	FA Rating	Reviewer Ratings	Section Scale	Weighted (%) Score of specific LC
Action & Result Orientation	20.00	0	0	0	5	0.00
Analytical & Creative Thinking	20.00	0	0	0	5	0.00
Learning Orientation	20.00	0	0	0	5	0.00
Organizational Alignment	20.00	0	0	0	5	0.00
Quality Orientation	20.00	0	0	0	5	0.00



# RATING APPRAISEE: OVERALL CURRENT ASSESSMENT AND POTENTIAL ASSESSMENT

1. Scroll to Overall Current Assessment and Potential Assessment sections.
2. Click the field in the appropriate row and select from the dropdown using scale on top as guide.

## Overall Current Assessment

\* Instruction: Appraisee to be rated by the Current Appraisee's and review officer

ORDINARY	DILIGENT	FANTASTIC	SUPERB
Performance is well below standard. Whether the person can improve to meet the minimum standard is questionable	Performance & Competence is below the expected standards. However, potential to improve within a reasonable time frame is evident. Not someone, whose attrition bothers company	Performance & Competence is largely meeting expected standards. This level is what satisfies the bosses / company to retain the talent even if it needs extra walking in normal circumstances	The person is so successful at his/her job & competencies criteria that special note should be made, and performance ranks in the top percentile. A top talent, someone to be retained at any cost!

Assessment By

Choose

Administrative Appraiser

Superb

Functional Appraiser

Superb

Functional Reviewer

## Potential Assessment

\* Instruction It's majorly about the 'future', not the past performance

LOW POTENTIAL	MEDIUM POTENTIAL	HIGH POTENTIAL	READY TO GO
Potential in current job is below expectation; needs more development & dedication	Shows good potential in current job, but needs more development & grooming for future / higher roles.	Shows high proficiency in current job(s); and is capable of handling higher/future role with guidance	Has overgrown current role, and is fully potent to take up higher/future role

Assessment By

Choose

Administrative Appraiser

Ready to go

Functional Appraiser

Ready to go

Functional Reviewer

Field for Functional Appraisal



# COMMENTING ON THE APPRAISEE

1. Navigate to the tab.
  - a. Admin Appraiser's Comment if you are an Administrative Appraiser.
  - b. Fun Appraiser's Comment if you are Functional Supervisor.
  - c. Reviewer's Comment if you are a Reviewer.
2. Click the Edit button if you are not on Edit mode.
3. Type your comment in the text field.
4. Save.

Administrative Appraisal / Junior Management Positions: - IBEH JANEFRANCES KELECHI

SAVE DISCARD

SUBMIT RATING

SEND MAIL REMINDER

DRAFT

ADMINISTRATIVE APPRAISER

FUNCTIONAL APPRAISER

REVIEWER

COMPLETED

## Junior Management Positions: - IBEH JANEFRANCES KELECHI

Period	Annual Appraisal Cycle 2022	Date From	01/10/2022
Deadline Date	30/05/2023	Date End	31/12/2022
		Submitted Date	05/05/2023 01:00:00

Instructions

Staff Profile

Sections

Score Details

Admin Appraiser's Comment

Appraisal Comment(s)

Return Comment(s)

### Admin Appraiser's Comment

Supervisor Comment

Start typing...

Attachment

Descrip...

Upload file

Download file

Add a line

# APPRAISERS AND REVIEWER'S SUBMISSION

1. Save if you have not saved before.
2. Click Submit Button

Administrative Appraisal / Junior Management Positions: - ILO CHIDIMMA IFUNANYA

EDIT

SUBMIT RATING

SEND MAIL REMINDER

DRAFT

ADMINISTRATIVE APPRAISER

FUNCTIONAL APPRAISER

REVIEWER

COMPLETED

Submit Button

## Junior Management Positions: - ILO CHIDIMMA IFUNANYA

Period Annual Appraisal Cycle 2022  
Deadline Date 30/05/2023

Date From 01/10/2022  
Date End 31/12/2022  
Submitted Date 05/05/2023 01:00:00

Instructions

Staff Profile

Sections

Score Details

Admin Appraiser's Comment

Appraisal Comment(s)

Return Comment(s)

# APPRAISERS AND REVIEWER'S SUBMISSION

1. Save if you have not saved before.
2. Click Submit Button

EDIT

SUBMIT RATING WITHDRAW

DRAFT ADMIN

**Submit Button**

## Junior Management positions/roles: - Ogonuwe chioma joy

Period April 2023 [Quarterly] Date From 04/01/2023

Deadline Date Date End 04/30/2023

Instructions	Staff Profile	Sections	Score Details	Appraisee's Comment	Manager's Comment	Reviewer's Comment
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Manager's Comment

# COMPLETED STATE: APPRAISEE PROCESS>>

## CHECKING PERFORMANCE

When the workflow get to  
“Completed”:

The ratings by the Appraisers is  
visible to the Appraisees in each of  
the sections in the Sections tab.

AA Rating - Administrative Appraisal  
Rating.

FA Rating - Functional Appraisal  
Rating.

Instructions

Staff Profile

Sections

Appraisee's Comment

Appraisal Comment(s)

Return Comment(s)

SECTION (A) - KRA / Achievement(s)

\* Instructions: Rating scale is 1 (Lowest rate) to 4 scale, where 4 is the HIGHEST rating

Description	Weight (Total 100%)	FA Weight (Total 100%)	Self Rating	AA Rating	FA Rating	Reviewer Ratings	Weighted (%) Score of sp...
A1	20.00	20.00	2	3	2	1	11.00
A2	20.00	20.00	3	3	2	4	17.00
A3	20.00	20.00	2	4	3	3	18.50
A4	20.00	20.00	3	4	4	3	20.00
A5	20.00	20.00	4	1	3	4	14.50
	100.00	100.00					

Functional Competency Sections

\* Instructions: Rating scale is 1 (Lowest rate) to 4(Highest) scale

Description	Weight (Total 100%)	AA Rating	FA Rating	Reviewer Ratings	Section Scale	Weighted (%) Score of specific FC
Functional/Process Knowledge	50	4	3	3	5	33.00
Functional Skills	50	4	4	3	5	36.00

# APPRAISEE COMMENTING AND ADDING ATTACHMENT

1. Navigate to “Appraisee Comment tab”.
2. Click Edit Button.
3. Type your comment in the “Appraisee Comment”.
4. Click the “Perception on PMS” field to select from the perception dropdown list.
5. Click on add line and select create to add proof to support your comment. (Optional).
6. Click Save Button.

Appraisee / Junior Management positions/roles: - Ogonuwe chioma joy

1/1 < >

EDIT ← 2

DRAFT ADMINISTRATIVE APPRAISER COMPLETED

### Perceptions

- a. Fully Agreed.
- b. Largely Agreed.
- c. Partially Agreed.
- d. Largely disagreed.
- e. Totally disagreed.

Junior Management positions/roles: - Ogonuwe chioma joy

Period April 2023 (Quarterly) Date From 04/01/2023  
Deadline Date Date End 04/30/2023

Instructions Staff Profile Sections Appraisee's Comment ← 1

#### Appraisee Section

Perception on PMS Totally Disagreed ← 4

Appraisee Comment I got the score I deserved. ← 3

Attachment

Description	Upload file

5 →

## **SIGNOFF STATE: HR PROCESS**

HR Manager Navigates uploads the normalized rating.



# LOGGING OUT OF THE SYSTEM

1. Click your username icon at the top right corner.
2. Select log out from the drop down menu.

The screenshot displays the HR PMS interface. At the top, a purple header bar contains the HR PMS logo, the text 'Appraisee(s)', and a user profile icon labeled 'Ogonuwe chioma joy'. A red arrow labeled '1' points to this icon. A dropdown menu is open, showing options: Documentation, Support, Shortcuts, My Profile, My Odoo.com account, and Log out. A red arrow labeled '2' points to the 'Log out' option. Below the header, the main content area shows the title 'Junior Management positions/roles: - Ogonuwe chioma joy' and buttons for 'SAVE', 'DISCARD', 'SUBMIT RATING', and 'WITHDRAW'. The 'ADMINISTRATION' tab is active. The main form area includes a section for 'Junior Management positions/roles: - Ogonuwe chioma joy' with fields for 'Period' (April 2023 [Quarterly]), 'Date From' (04/01/2023), 'Deadline Date', and 'Date End' (04/30/2023). Below this are tabs for 'Informations', 'Sections', 'Appraisee's Comment', and 'Instructions'. The 'Appraisee Section' is visible, containing an 'Appraisee Comment' field, a 'Perception on PMS' dropdown, and an 'Attachment' table with columns for 'Description' and 'Upload file'.



THANKS

