



# VHRIS

## Performance Appraisal

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## Performance Appraisal

Performance appraisal is a systematic evaluation of performance of the employees and to understand the abilities of a person for further career transition. It is generally done by the supervisors based on measuring criterion such as parameters, questions, ratings and more.

In VHRIS, the appraisal is configured for an entire business unit or for a specific department in a business unit.

To configure the appraisal process, first the appraisal settings for the selected business unit or department must be configured.

## Appraisal Settings

Appraisal Settings set the mode and ratings for the selected business unit or department.

The appraisal mode can be quarterly, half yearly, or yearly. The ratings can be 1-5 or 1-10 depending on the appraisal architecture of the organization. Ratings are provided with description signifying each ratings definition in the appraisal process.

### Organization >> Business Unit

1. Click on Organization in the header
2. Click on Business Units on the left side panel
3. Click on Add in the right side panel

### Organization >> Department

4. Click on Organization in the header
5. Click on Department on the left side panel
6. Click on Add in the right side panel

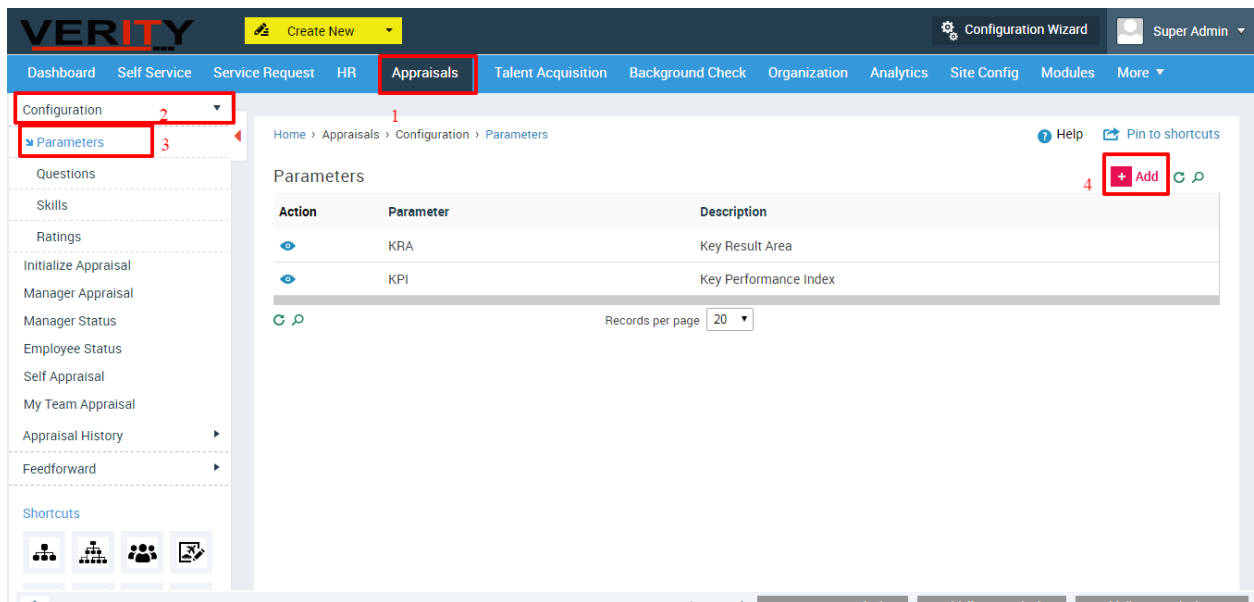


## Parameters

Parameters define the performance indicators defined by the supervisors to assess the capabilities of the employees.

1. Click on Appraisal in the header
2. Click on configurations on the left side panel
3. Click on parameters submenu
4. Click on Add in the right side panel

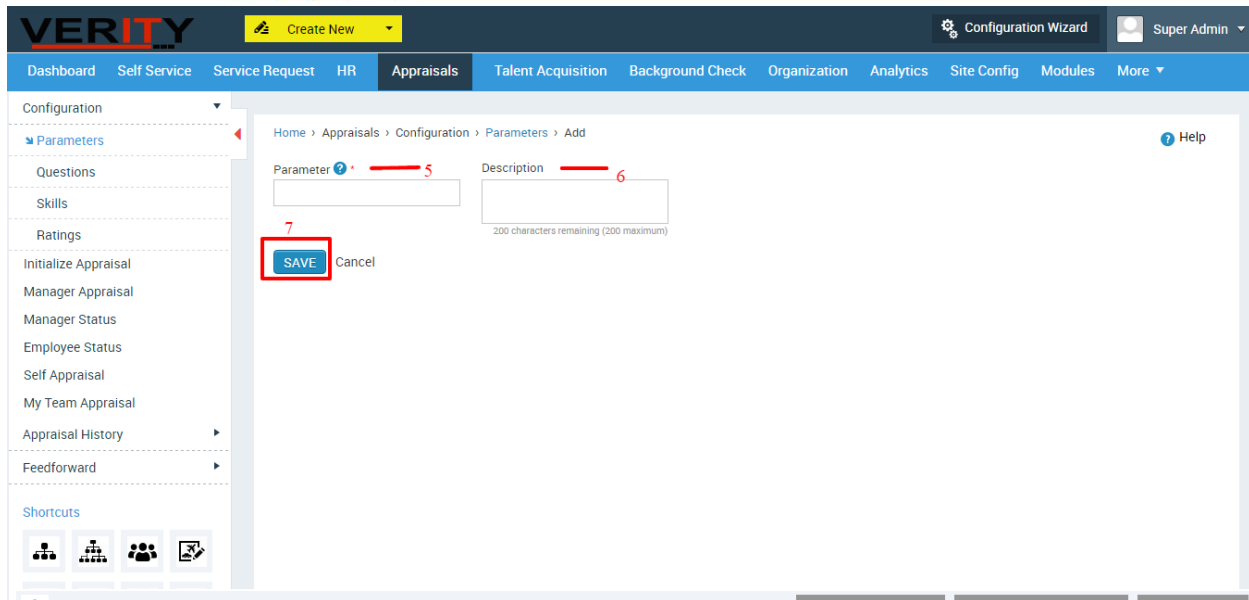
Refer Figure 3



In the Add parameter screen,

5. Enter the parameter
6. Provide description if necessary
7. Click on save to add the parameter

Refer figure 4

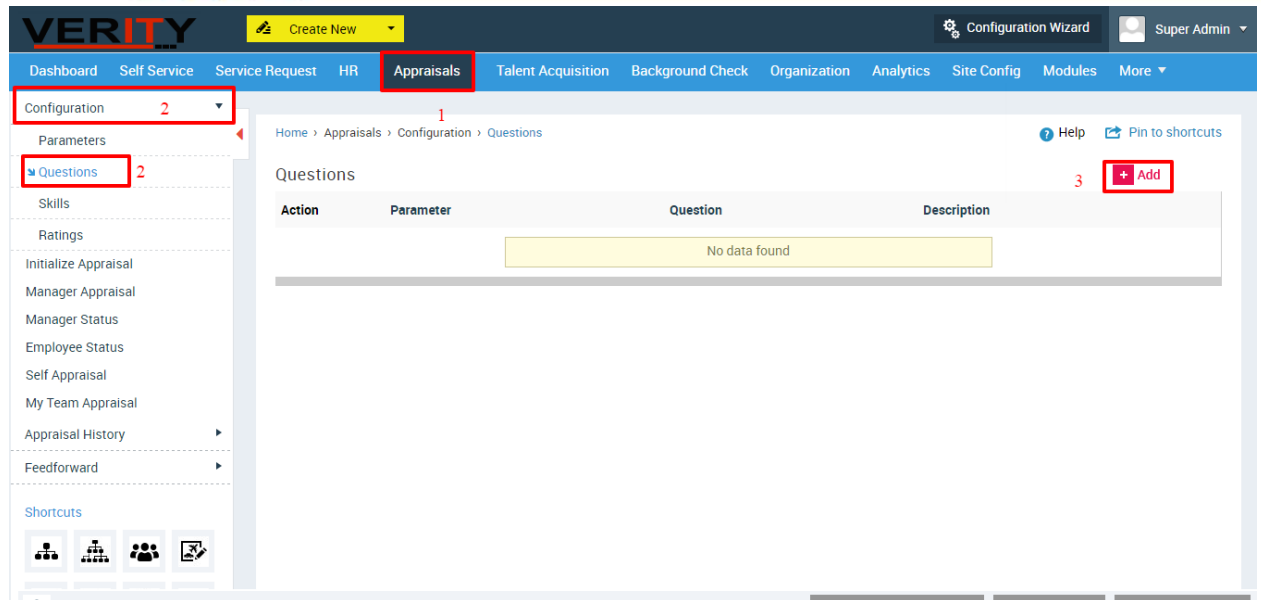


## Questions

Questions are determined for each parameter defined in the parameters section. For each parameter, the supervisor can provide more than one question in relation with the parameter.

1. Click on Appraisal in the header
2. Click on configurations on the left side panel
3. Click on Questions sub menu
4. Click on Add in the right side panel

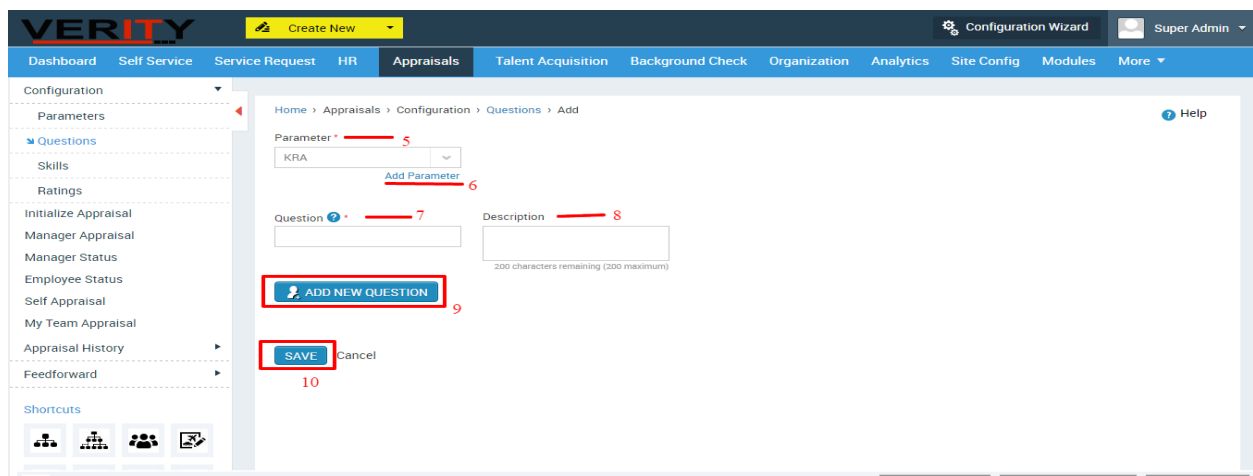
Refer Figure 5



In the Add Questions screen,

5. Select an option from the parameters dropdown
6. Add other parameter by clicking Add Parameter
7. Enter the question
8. Provide description if necessary
9. Click on "Add New Question" to add questions for the selected parameter
10. Click on Save to add questions for the selected parameter

Refer Figure 6



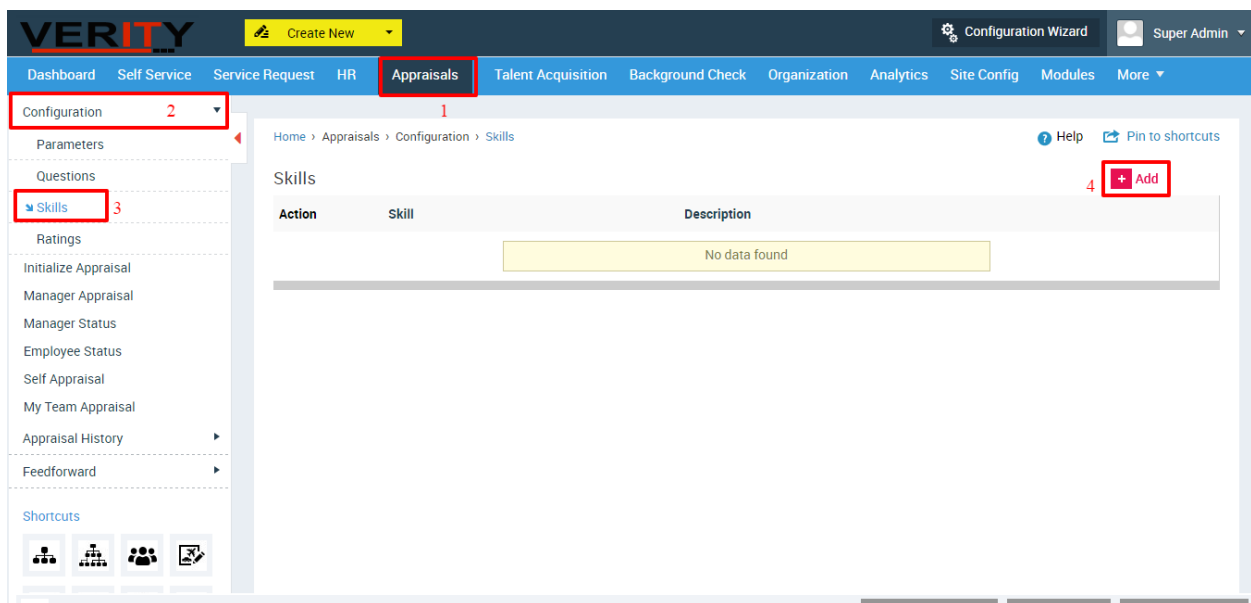


## Skills

Skills are the skill set that enhances the employee's profile.

1. Click on Appraisal in the header
2. Click on Configurations on the left side panel
3. Click on Skills submenu
4. Click on Add in the right side panel

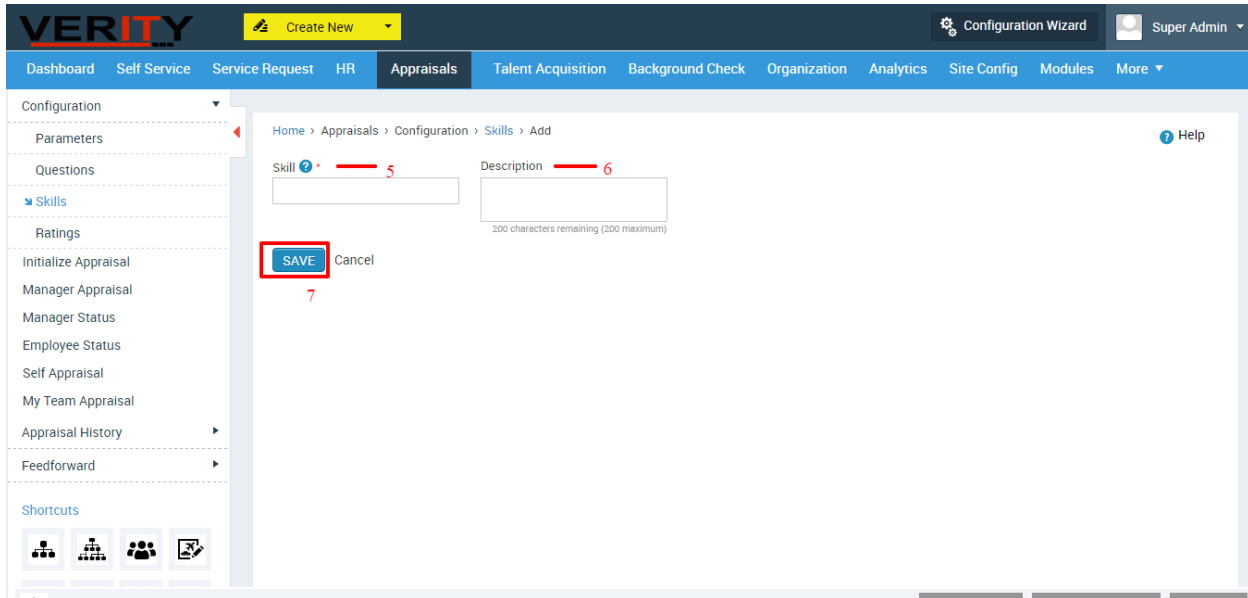
Refer figure 7



In the Add Skills screen,

5. Enter the skill
6. Provide description if necessary
7. Click on save to add the skills

Refer figure 8

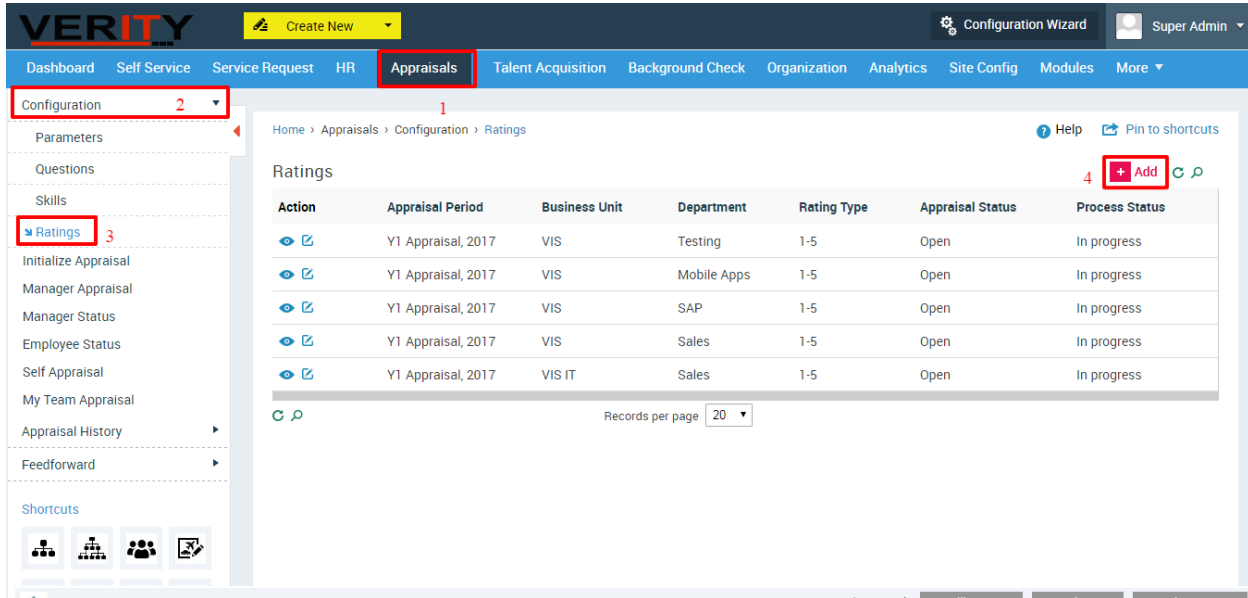


## Ratings

Ratings are defined for each business unit or department for which the appraisal settings are previously configured. The rating scale, 1-5 and 1-10, is decided as per the standards of the organization for appraisal process.

1. Click on Appraisal in the header
2. Click on Configurations on the left side panel
3. Click on Ratings submenu
4. Click on Add in the right side panel

Refer figure 9



Home > Appraisals > Configuration > Ratings

Ratings

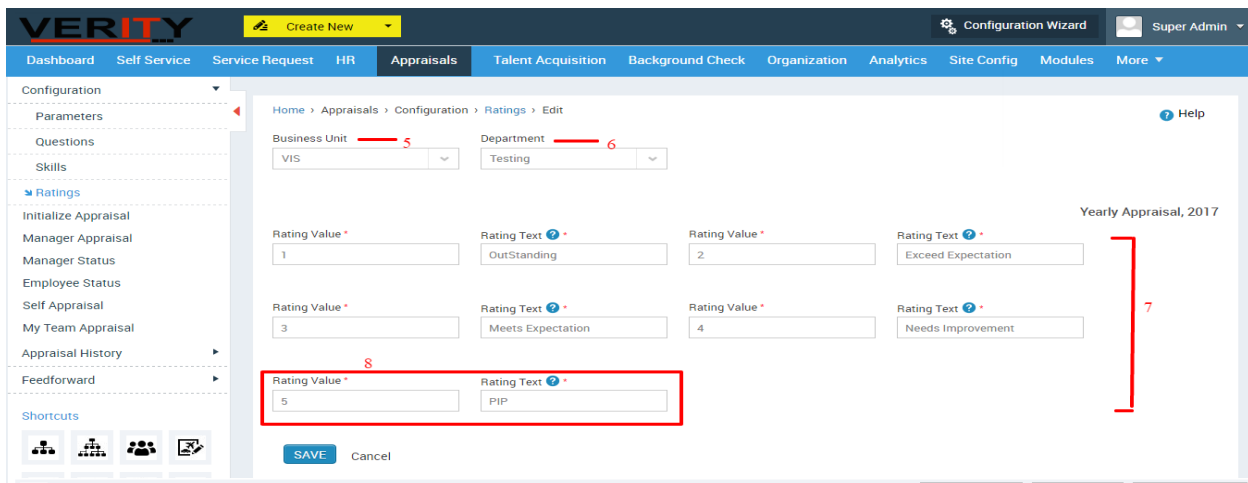
Action	Appraisal Period	Business Unit	Department	Rating Type	Appraisal Status	Process Status
	Y1 Appraisal, 2017	VIS	Testing	1-5	Open	In progress
	Y1 Appraisal, 2017	VIS	Mobile Apps	1-5	Open	In progress
	Y1 Appraisal, 2017	VIS	SAP	1-5	Open	In progress
	Y1 Appraisal, 2017	VIS	Sales	1-5	Open	In progress
	Y1 Appraisal, 2017	VIS IT	Sales	1-5	Open	In progress

Records per page: 20

In the Add ratings screen,

5. Select an option from Business Unit dropdown
6. Select an option from Department dropdown
7. The Appraisal Ratings range selected in Appraisal Settings for the selected Business Unit and Department are auto populated
8. Provide rating text for each rating value
9. Click on save to add the ratings

Refer figure 10



Home > Appraisals > Configuration > Ratings > Edit

Business Unit: VIS (5) Department: Testing (6)

Yearly Appraisal, 2017

Rating Value: 1	Rating Text: OutStanding	Rating Value: 2	Rating Text: Exceed Expectation
Rating Value: 3	Rating Text: Meets Expectation	Rating Value: 4	Rating Text: Needs Improvement
Rating Value: 5 (8)	Rating Text: PIP		

SAVE Cancel





Upon configuring the essential details, the initialization of appraisal process is the next step.

## Initialize Appraisal

In the initialization step, the business units or the departments that have their appraisal settings configured will be displayed.

- **Business unit:** All the Business Units which have the Appraisal Settings/Organization configured will be displayed
- **Frequency:** Based on the appraisal settings for the selected business unit, frequency will be auto populated
- **Period:** Period will be calculated dynamically based on the previously configured appraisal for the selected business unit
- **Appraisal Status:** Appraisal status will be "Open" by default. Upon the initialization of appraisal, close and force close options will be made available
- **Force Close:** Closes the Appraisal Process by force. Appraisal Process for the selected Business Unit can be configured again and for the same appraisal period
- **Close:** Closes the appraisal process for the selected business unit permanently
- **Enable to:** The Appraisal Process will be enabled by default to managers. When the settings saved, the Appraisal Process will be made available for managers to configure the questions under the selected parameters. If the appraisal is directly made available for the employees, they will be able to view the questions configured by the HR.
- **Due Date:** The due date is for closing the appraisal process for managers or employees
- **Consider Management :** To consider management group for appraisal

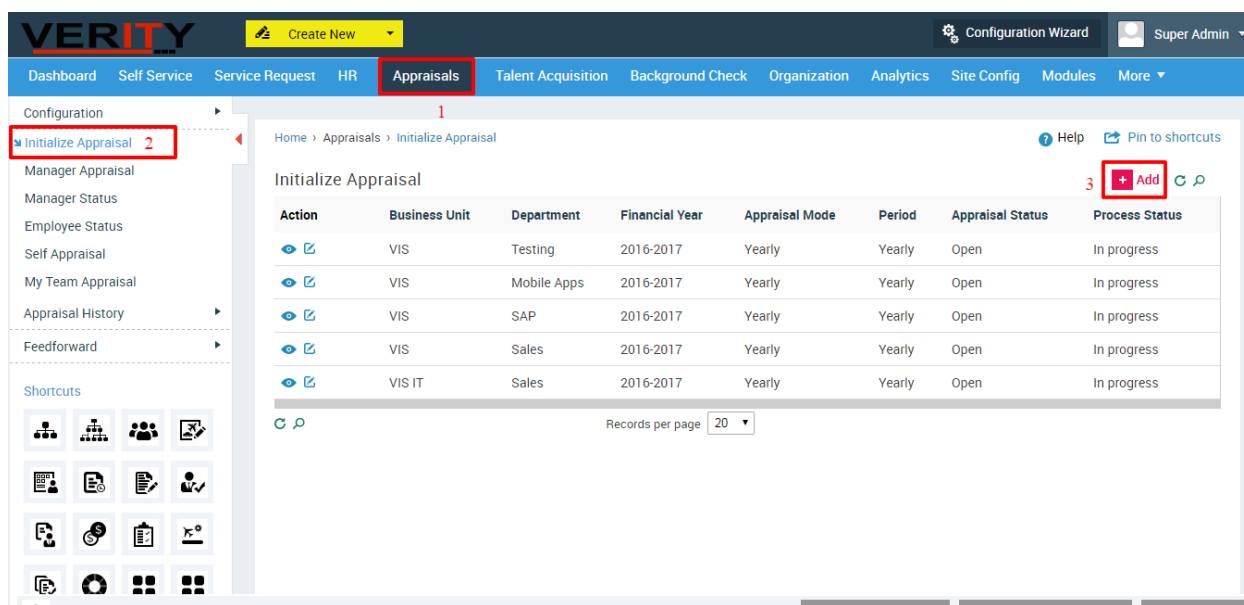












process for the selected period, check the respective checkbox

- **Eligibility:** Select the employees eligible for appraisal period based on the employee status
- **Parameters:** Select the parameters for appraisal process that will be applicable to the employees
- **Ratings :** The ratings configured in appraisal setting/organization for a business unit or department will be auto- populated

1. Click on Appraisal in the header
2. Click on Initialize Appraisal in the left side panel
3. Click on Add in the right side panel

Refer figure 11



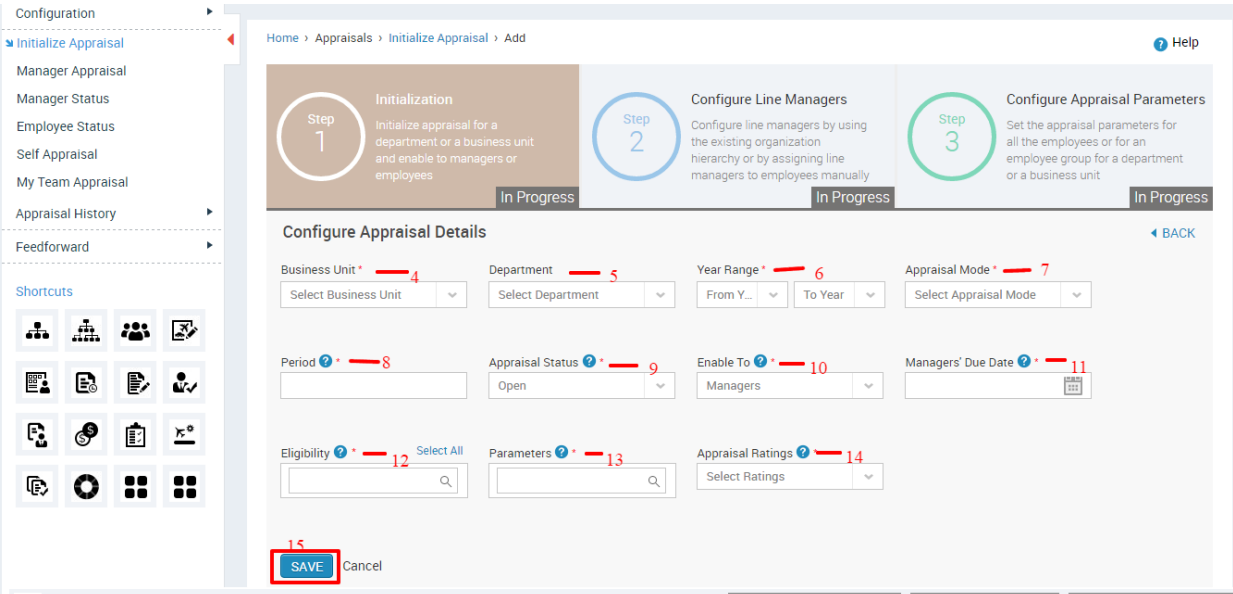
Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
 	VIS	Testing	2016-2017	Yearly	Yearly	Open	In progress
 	VIS	Mobile Apps	2016-2017	Yearly	Yearly	Open	In progress
 	VIS	SAP	2016-2017	Yearly	Yearly	Open	In progress
 	VIS	Sales	2016-2017	Yearly	Yearly	Open	In progress
 	VIS IT	Sales	2016-2017	Yearly	Yearly	Open	In progress

4. All the business units for which the appraisal settings are configured are populated. Select an option from business unit dropdown
5. Select an option from the department dropdown
6. Select the year range



7. Based on the selected business unit and department, the appraisal mode is populated
8. Period will be dynamically calculated and populated
9. Appraisal Status is by default Open in Initialize e appraisal
10. Select an option in Enable To dropdown
11. Based on the Enable To option, set a due date to the employees or to managers
12. Select more than one eligibility criteria for employees who are eligible for the appraisal process
13. Select more than one parameters
14. Select appraisal ratings
15. Click on save to initialize appraisal for a business unit or a department

Refer figure 12



Configuration

- Initialize Appraisal
- Manager Appraisal
- Manager Status
- Employee Status
- Self Appraisal
- My Team Appraisal
- Appraisal History
- Feedforward

Shortcuts

Home > Appraisals > Initialize Appraisal > Add

Help

Step 1 Initialization  
Initialize appraisal for a department or a business unit and enable to managers or employees  
In Progress

Step 2 Configure Line Managers  
Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually  
In Progress

Step 3 Configure Appraisal Parameters  
Set the appraisal parameters for all the employees or for an employee group for a department or a business unit  
In Progress

Configure Appraisal Details

Business Unit \* 4  
Select Business Unit

Department 5  
Select Department

Year Range \* 6  
From Y... To Year

Appraisal Mode \* 7  
Select Appraisal Mode

Period 8  
Appraisal Status 9  
Open

Enable To 10  
Managers

Managers' Due Date 11

Eligibility 12  
Select All

Parameters 13

Appraisal Ratings 14  
Select Ratings

15  
SAVE Cancel



## Configure Line Managers

Once the appraisal process is initiated for a department or a business unit, the line managers must be configured so as to evaluate the employees' appraisal.

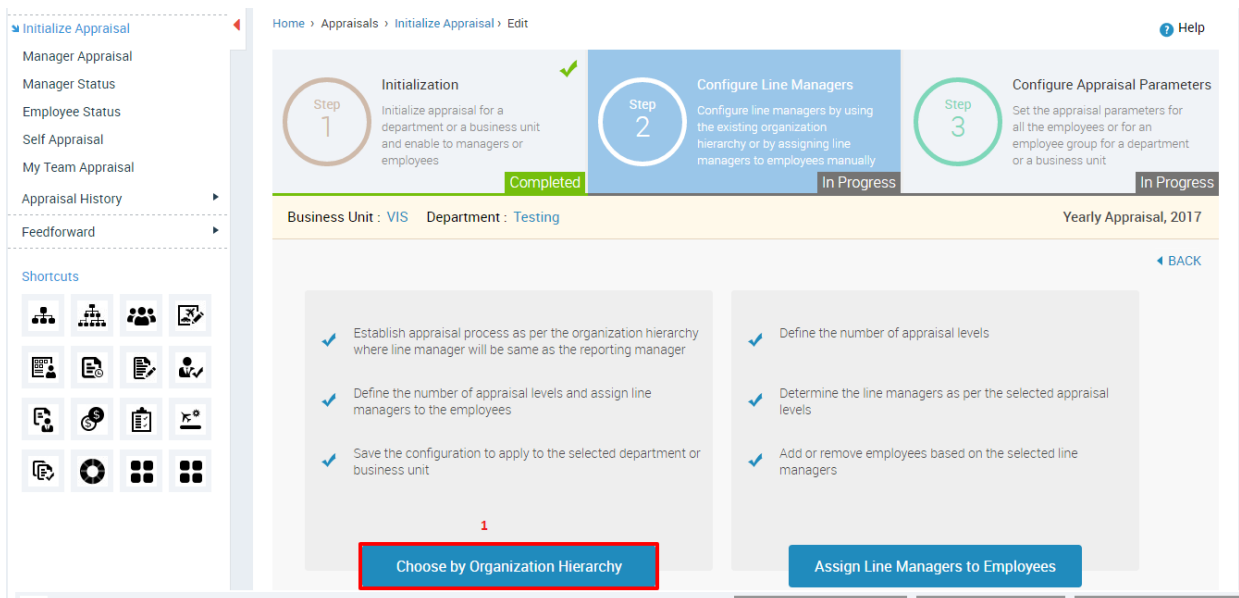
The line managers can be configured in the appraisal process in two ways:

1. Choose by organization hierarchy

- ▶ Establish appraisal process as per the organization hierarchy where line manager will be same as the reporting manager.
- ▶ Define the no. of appraisal levels and assign line managers to the employees.
- ▶ Save the configuration to apply to the selected department or business unit.

1. Click on Choose by Organization Hierarchy

2. Click Yes in the Confirmation alert box





**Confirmation**

You choose to configure line managers by Organization Hierarchy. Please confirm.

**Yes** **No**

2

Step 1 Initialization  
Initialize appraisal for a department or a business unit and enable to manage employees

Step 2 **Configure Line Managers**  
Configure line managers by using the existing organization assigning line employees manually

Step 3 Configure  
Set the appraisal levels for all the employees or a business unit

Business Unit : VIS Department : VIS

Establish appraisal process as per the organization hierarchy where line manager will be same as the reporting manager

Define the number of appraisal levels

3. Manager and the employees under the manager are displayed
4. On the right side, configure line managers by selected the number of appraisal levels
5. Click on Save.

Refer figure 14

Configure Line Managers by Organization Hierarchy

BACK

Ali Ahmed  
VIS20100200  
VP VIS  
L1 Manager  
Employee(s)  
1

Rouf Shaik  
VIS20110003  
Manager  
L1 Manager  
Employee(s)  
1

Employees under L1 Manager

Noone Sravani  
(VIS20150206)  
EPM

Configure Line Managers

Select Appraisal Levels  
3

L2 Manager  
Select L2 Manager

L3 Manager  
Select L3 Manager

**SAVE** CANCEL

3

4

5

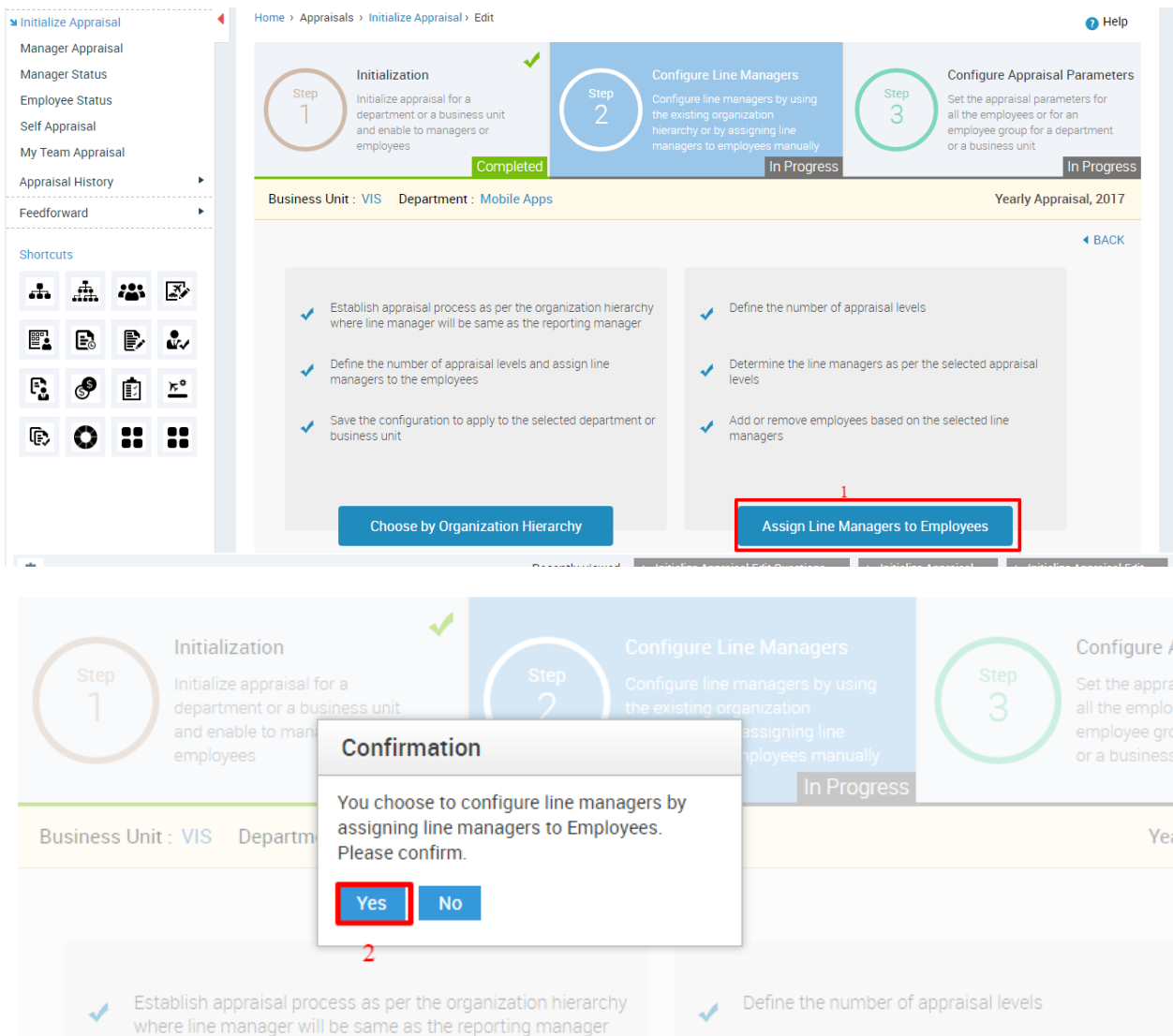


## 2. Assign Line Managers to Employees

- ▶ Define the number of appraisal levels
- ▶ Determine the line managers as per the selected appraisal levels
- ▶ Add or remove employees based on the selected line managers

1. Click on Assign line managers to employees
2. Click yes in the confirmation alert box

Refer figure 15



Home > Appraisals > Initialize Appraisal > Edit

Help

Step 1 Initialization  
Initialize appraisal for a department or a business unit and enable to managers or employees  
Completed

Step 2 Configure Line Managers  
Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually  
In Progress

Step 3 Configure Appraisal Parameters  
Set the appraisal parameters for all the employees or for an employee group for a department or a business unit  
In Progress

Business Unit : VIS Department : Mobile Apps Yearly Appraisal, 2017

BACK

Establish appraisal process as per the organization hierarchy where line manager will be same as the reporting manager

Define the number of appraisal levels and assign line managers to the employees

Save the configuration to apply to the selected department or business unit

Choose by Organization Hierarchy

Assign Line Managers to Employees

Confirmation

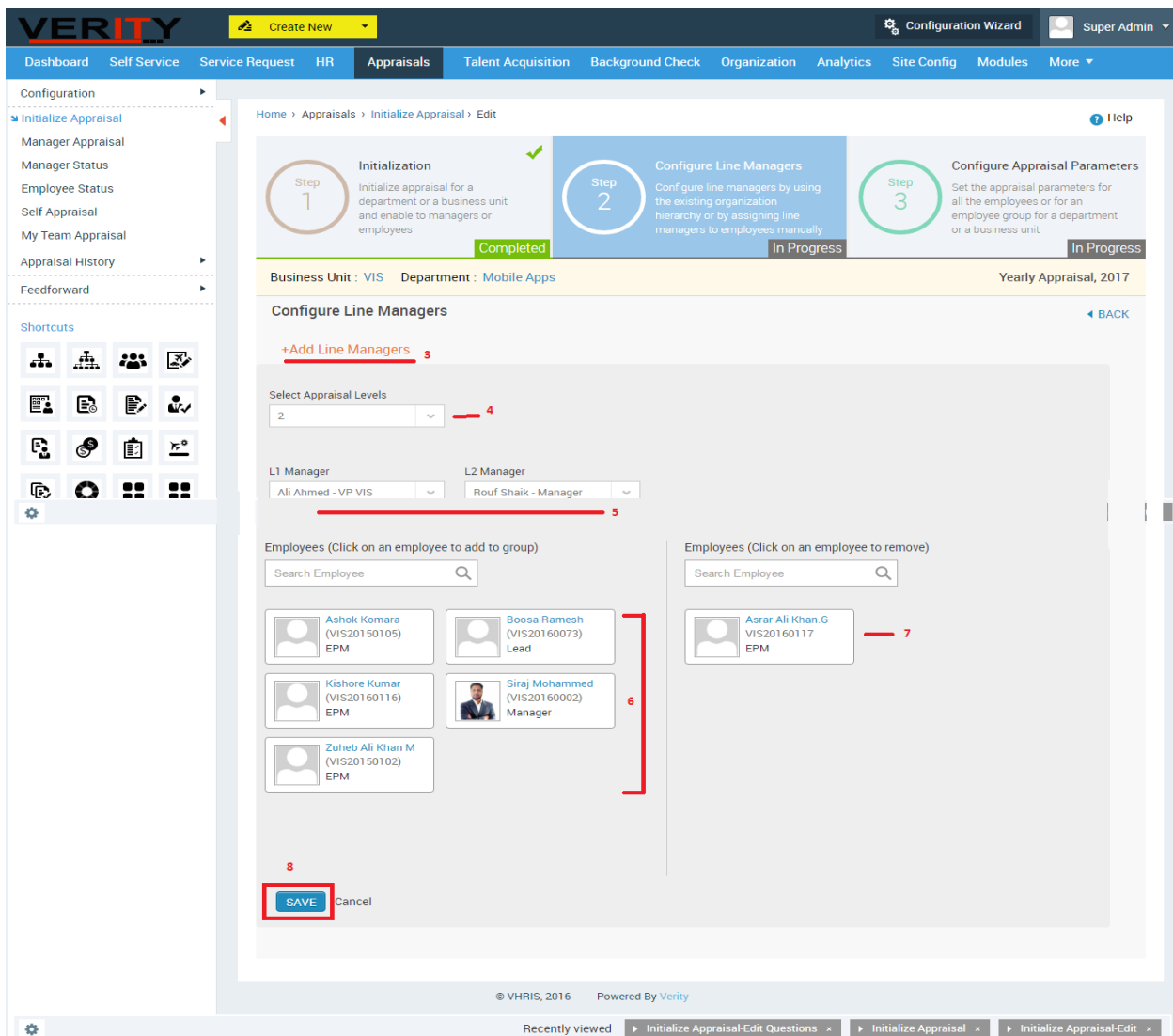
You choose to configure line managers by assigning line managers to Employees. Please confirm.

Yes No



3. Click on Add Managers link
4. Select the number of appraisal levels
5. Based on the number of appraisal levels, select the line managers
6. Employees are displayed in the left side panel
7. Click on the employee to select for appraisal process
8. Click on Save

Refer figure 16





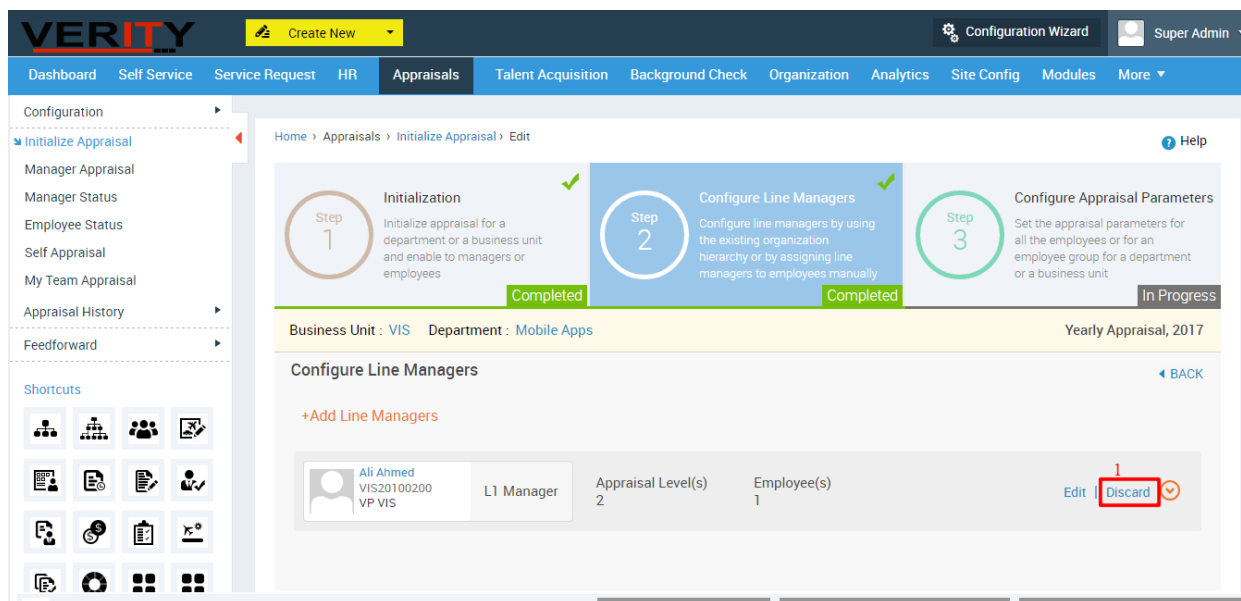


## Discard Line Manager Configuration

You can discard the line managers' configuration after saving the appraisal process in step two.

1. Click on Discard to discard the line manager configurations

Refer figure 17



## Configure Appraisal Parameters

Configure the appraisal parameters after configuring the line managers. Here, the appraisal process can be made applicable to employees.

This step can be done in two ways:

1. All Employees
  - ▶ Questions created for the selected parameters in initialization step will be displayed
  - ▶ Choose or add questions to be enabled to all employees for the selected business unit or department
  - ▶ Choose ratings and/or comments for each question by line manager and employee





1. Click on Assign Line Managers to Employees
2. Click yes in the confirmation alert box

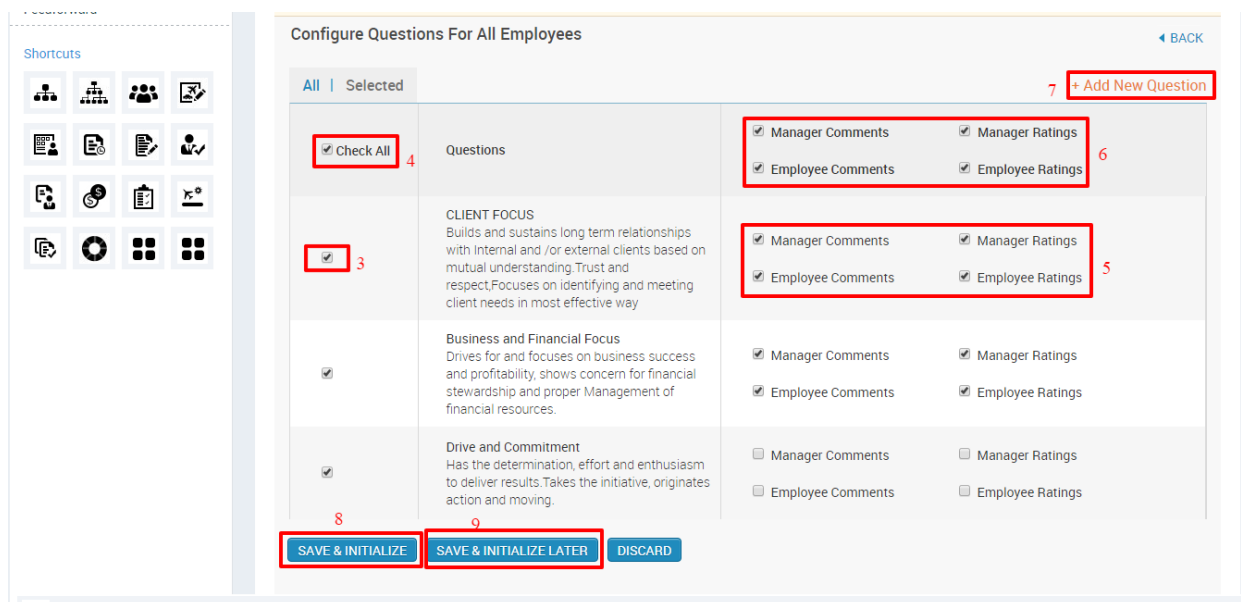
Refer figure 18

3. Select Questions individually by checking the checkbox respective to each question **Or**
4. Select all the questions by checking the Check All option in the table header
5. Select ratings or comments of manager or employee individually for all the questions **Or**



6. Select ratings or comments of manager or employee by checking the Manager Rating, Manager Comments, Employee Ratings and Employee Comments
7. Click on Add New Question to add more questions to the appraisal process
8. Click on Save & Initialize to initialize the appraisal **Or**
9. Click on Save and initialize later to only save the appraisal process

Refer figure 19



Configure Questions For All Employees

Shortcuts

Check All 4

3

Client Focus  
Builds and sustains long term relationships with internal and /or external clients based on mutual understanding. Trust and respect, Focuses on identifying and meeting client needs in most effective way

Business and Financial Focus  
Drives for and focuses on business success and profitability, shows concern for financial stewardship and proper Management of financial resources.

Drive and Commitment  
Has the determination, effort and enthusiasm to deliver results. Takes the initiative, originates action and moving.

8

9

SAVE & INITIALIZE

SAVE & INITIALIZE LATER

DISCARD

7 + Add New Question

6

5

## 2. Customized Employee Groups

- ▶ Apply appraisal parameters by grouping employees
- ▶ Choose or add questions to be enabled to all employees for the selected business unit or department
- ▶ Choose ratings and/or comments for each question by line manager and employee

1. Click on Customized Employees Groups
2. Click yes in the confirmation alert box



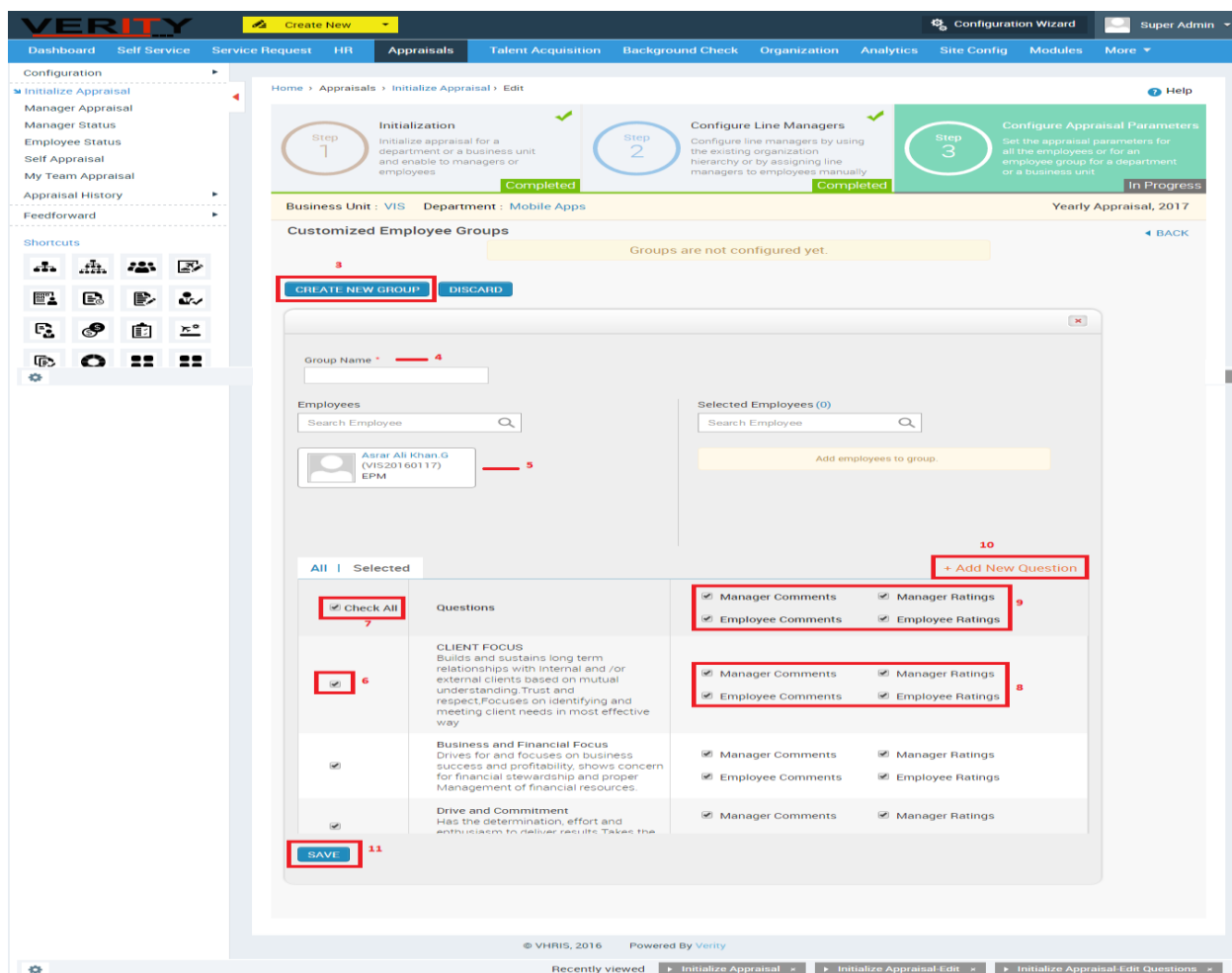
Refer figure 20

3. Click on create New Group
4. Select employees applicable for the appraisal process
5. Select Questions individually by checking the checkbox respective to each question
- Or
6. Select all the questions by checking the Check All option in the table header



7. Select ratings or comments of manager or employee individually for all the questions
- Or
8. Select ratings or comments of manager or employee by checking the Manager Rating, Manager Comments, Employee Ratings and Employee Comments
9. Click on Add New Question to add more questions to the appraisal process
10. Click on Save to configure appraisal parameters

Refer figure 21



VERITY

Create New

Configuration Wizard Super Admin

Dashboard Self Service Service Request HR Appraisals Talent Acquisition Background Check Organization Analytics Site Config Modules More

Configuration

- Initialize Appraisal
- Manager Appraisal
- Manager Status
- Employee Status
- Self Appraisal
- My Team Appraisal
- Appraisal History
- Feedforward

Shortcuts

Home > Appraisals > Initialize Appraisal > Edit

Step 1 Initialization Initialize appraisal for a department or a business unit and enable to managers or employees **Completed**

Step 2 Configure Line Managers Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually **Completed**

Step 3 Configure Appraisal Parameters Set the appraisal parameters for all the employees or for an employee group for a department or a business unit **In Progress**

Business Unit : VIS Department : Mobile Apps Yearly Appraisal, 2017

Customized Employee Groups

Groups are not configured yet.

CREATE NEW GROUP DISCARD

Group Name \*

Employees

Search Employee

Asrar Ali Khan (VIS20160117) EPM

Selected Employees (0)

Search Employee

Add employees to group.

+ Add New Question

All	Selected	Questions	Manager Comments	Manager Ratings	Employee Comments	Employee Ratings
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CLIENT FOCUS Builds and sustains long term relationships with internal and /or external clients based on mutual understanding.Trust and respect.Focuses on identifying and meeting client needs in most effective way	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Business and Financial Focus Drives for and focuses on business success and profitability, shows concern for financial stewardship and proper Management of financial resources.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Drive and Commitment Has the determination, effort and enthusiasm to deliver results Takes the	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SAVE

© VHRIS, 2016 Powered By Verity

Recently viewed Initialize Appraisal Initialize Appraisal Edit Initialize Appraisal Edit Questions



11. Upon Saving the appraisal parameters, click on initialize to initialize the appraisal process
12. Click on Initialize Later to only save the appraisal process
13. Click yes on the confirmation box to initialize the appraisal

Refer figure 22

VERITY Create New Configuration Wizard Super Admin

Dashboard Self Service Service Request HR Appraisals Talent Acquisition Background Check Organization Analytics Site Config Modules More

Configuration

- Initialize Appraisal
- Manager Appraisal
- Manager Status
- Employee Status
- Self Appraisal
- My Team Appraisal
- Appraisal History
- Feedforward

Shortcuts

Home > Appraisals > Initialize Appraisal > Edit

Help

Step 1 Initialization Initialize appraisal for a department or a business unit and enable to managers or employees **Completed**

Step 2 Configure Line Managers Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually **Completed**

Step 3 Configure Appraisal Parameters Set the appraisal parameters for all the employees or for an employee group for a department or a business unit **In Progress**

Business Unit : VIS Department : Mobile Apps Yearly Appraisal, 2017

Customized Employee Groups

Once appraisal process is initialized and employees start filling their appraisals, questions cannot be added or edited.

MobileAppGroup	
Employees	Questions
1	9

11 INITIALIZE 12 INITIALIZE LATER DISCARD

Confirm

Appraisal will be initialized. Do you wish to continue?

13 Yes No

INITIALIZE INITIALIZE LATER DISCARD

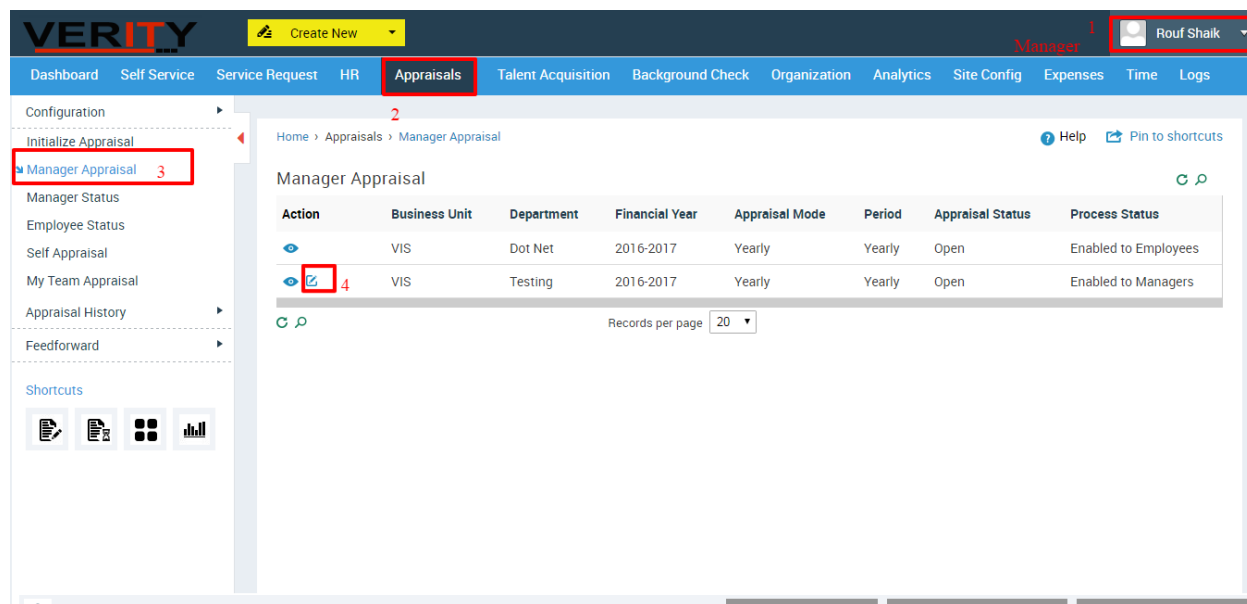


## Manager Appraisal

In the first step of Initialize appraisal, if the appraisal is enabled to managers, managers can configure the Appraisal parameters. Once the parameters are set, manager creates employee groups and applies the appraisal parameters to the group. Upon saving the appraisal settings, the HR will be able to change the status of appraisal process from "Enabled to Managers" to "Enabled to Employees".

1. Login as a manager
2. Click on Appraisal in the header
3. Click on Manager Appraisal in the left side menu
4. Click on edit icon with respect to an appraisal process

Refer figure 23



The screenshot displays the Verity HR system interface. The top navigation bar includes 'Appraisals' (highlighted in red). The left sidebar shows 'Manager Appraisal' (highlighted in red). The main content area displays the 'Manager Appraisal' configuration page. A table lists appraisal processes with columns: Action, Business Unit, Department, Financial Year, Appraisal Mode, Period, Appraisal Status, and Process Status. Two rows are visible: one for 'Dot Net' (Enabled to Employees) and one for 'Testing' (Enabled to Managers). The 'Testing' row is highlighted, and its edit icon is circled in red.

Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
	VIS	Dot Net	2016-2017	Yearly	Yearly	Open	Enabled to Employees
	VIS	Testing	2016-2017	Yearly	Yearly	Open	Enabled to Managers

5. Create new group (E.g., Support, Testing, Development, etc.)
6. Add employees to the group by clicking on an employee
7. Click on Add New Question to add questions for a particular group of employees



8. Select Questions individually by checking the checkbox respective to each question **Or**
9. Select all the questions by checking the Check All option in the table header
10. Select ratings or comments of manager or employee individually for all the questions **Or**
11. Select ratings or comments of manager or employee by checking the Manager Rating, Manager
12. Comments, Employee Ratings and Employee Comments
13. Click on Save

Refer figure 24

**Initialization Details**

Business Unit	VIS	Department	Testing
Appraisal Mode	Yearly	From Year	2016
To Year	2017	Period	Yearly
Appraisal Status	Open	Eligibility	Permanent
Enabled To	Managers	Parameters	KPI
Managers Due Date	30.05.2017	Process Status	Enabled to Managers
Appraisal Ratings	1-5		

**Group Details**

Groups are not configured yet.

**CREATE NEW GROUP** **SUBMIT INITIALIZATION**

**Configure Appraisal Parameters for All Employees**

**Check All** **Questions** **Manager Comments** **Manager Ratings** **Employee Comments** **Employee Ratings**

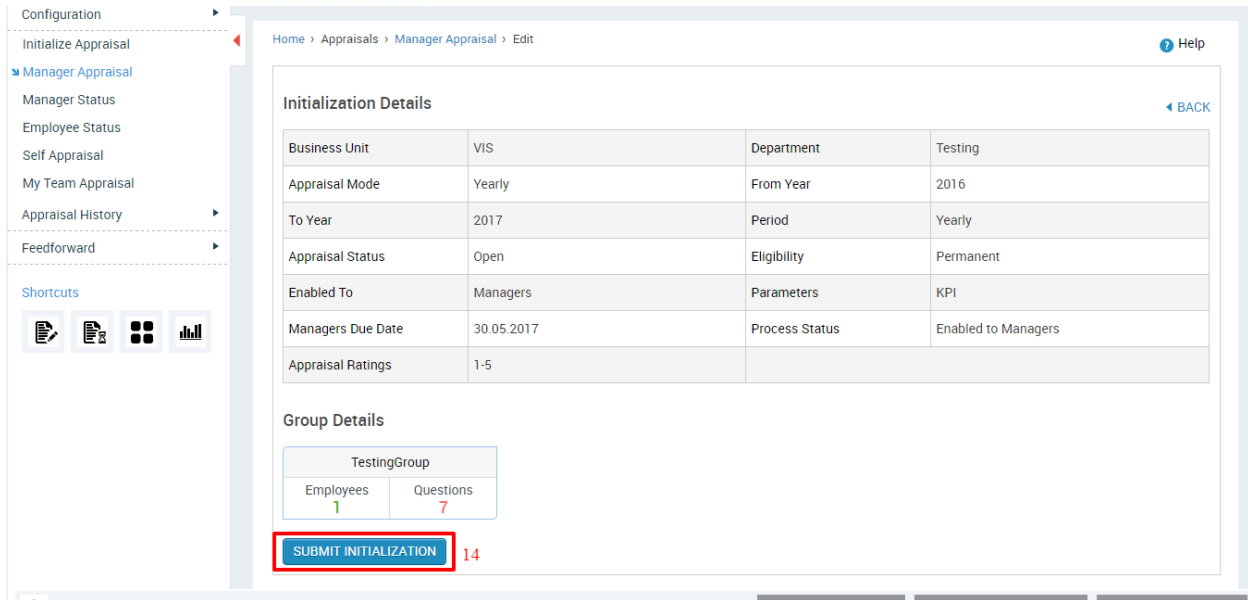
**Save**

Upon saving appraisal details, the manager must submit the appraisal process for initialization.

14. Click on submit initialization.

Refer figure 25





Home > Appraisals > Manager Appraisal > Edit

Initialization Details

Business Unit	VIS	Department	Testing
Appraisal Mode	Yearly	From Year	2016
To Year	2017	Period	Yearly
Appraisal Status	Open	Eligibility	Permanent
Enabled To	Managers	Parameters	KPI
Managers Due Date	30.05.2017	Process Status	Enabled to Managers
Appraisal Ratings	1-5		

Group Details

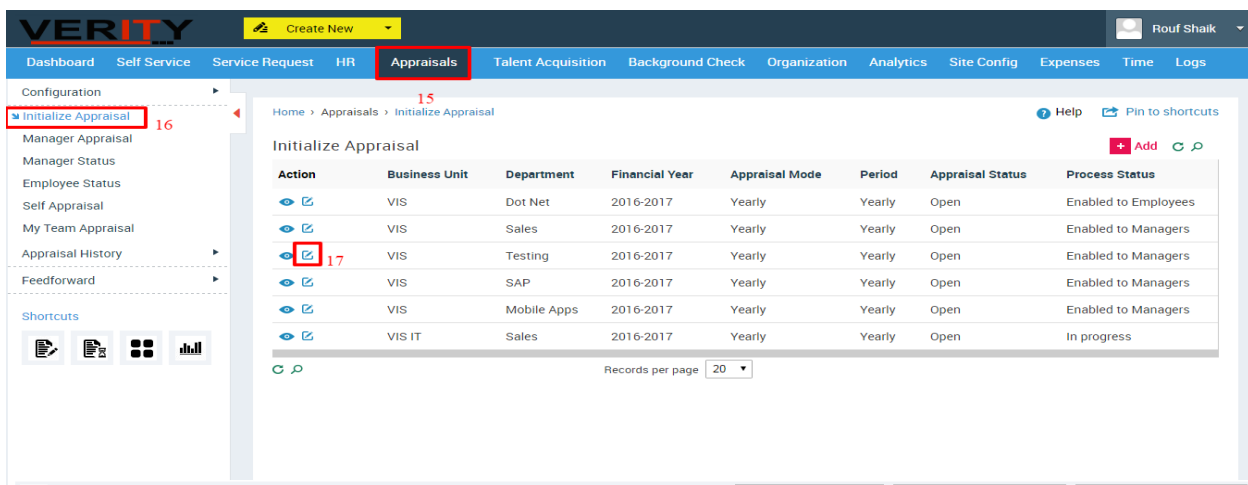
TestingGroup	
Employees	Questions
1	7

**SUBMIT INITIALIZATION** 14

The Hr, then will update the appraisal process by changing the process status from "Enable to Managers" to "Enable to Employees" and providing Employee Due Date.

15. Click on Appraisal in the header
16. Click on Initialize Appraisal in the left side menu
17. Click on edit icon with respect to an appraisal process

Refer figure 26



Home > Appraisals > Initialize Appraisal

Initialize Appraisal

Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
	VIS	Dot Net	2016-2017	Yearly	Yearly	Open	Enabled to Employees
	VIS	Sales	2016-2017	Yearly	Yearly	Open	Enabled to Managers
17	VIS	Testing	2016-2017	Yearly	Yearly	Open	Enabled to Managers
	VIS	SAP	2016-2017	Yearly	Yearly	Open	Enabled to Managers
	VIS	Mobile Apps	2016-2017	Yearly	Yearly	Open	Enabled to Managers
	VIS IT	Sales	2016-2017	Yearly	Yearly	Open	In progress

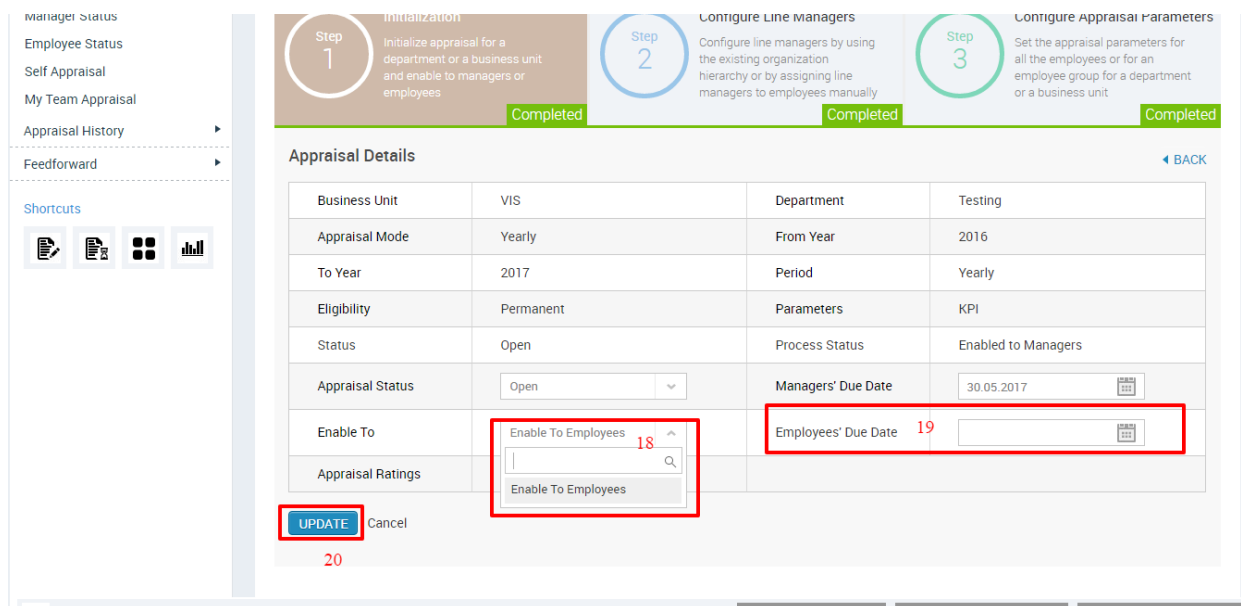
Records per page 20





18. Select "Enable to Employees" in the Enable To dropdown
19. Pick a date for Employee Due Date
20. Click on Update to enable the appraisal process to employees

Refer figure 27



Manager Status  
Employee Status  
Self Appraisal  
My Team Appraisal  
Appraisal History  
Feedforward

Shortcuts

Step 1 Initialization  
Initialize appraisal for a department or a business unit and enable to managers or employees  
Completed

Step 2 Configure Line Managers  
Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually  
Completed

Step 3 Configure Appraisal Parameters  
Set the appraisal parameters for all the employees or for an employee group for a department or a business unit  
Completed

Appraisal Details

Business Unit	VIS	Department	Testing
Appraisal Mode	Yearly	From Year	2016
To Year	2017	Period	Yearly
Eligibility	Permanent	Parameters	KPI
Status	Open	Process Status	Enabled to Managers
Appraisal Status	Open	Managers' Due Date	30.05.2017
Enable To	Enable To Employees	Employees' Due Date	19
Appraisal Ratings			

UPDATE Cancel

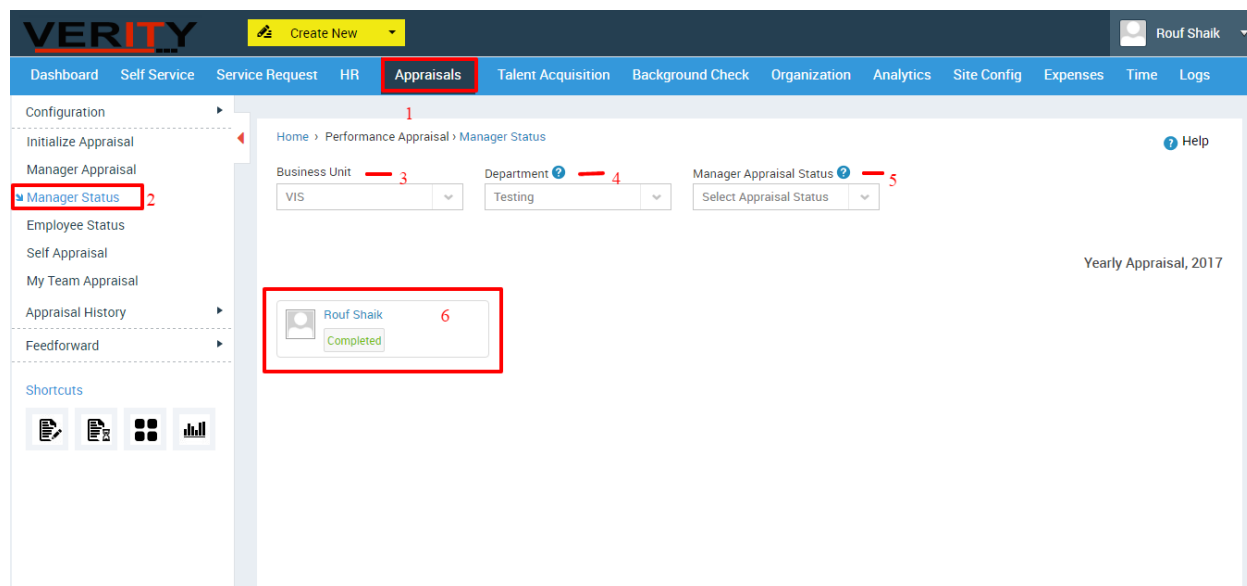
20

## Manager Status

In this page, the HR views the status of appraisal process when it is enabled to the managers.

1. Click on Appraisal in the header
2. Click on Manager Status in the left side menu
3. Select the Business Unit
4. Select the Department
5. Select the Manager Appraisal Status if required
6. Managers and their status will be displayed

Refer figure 28

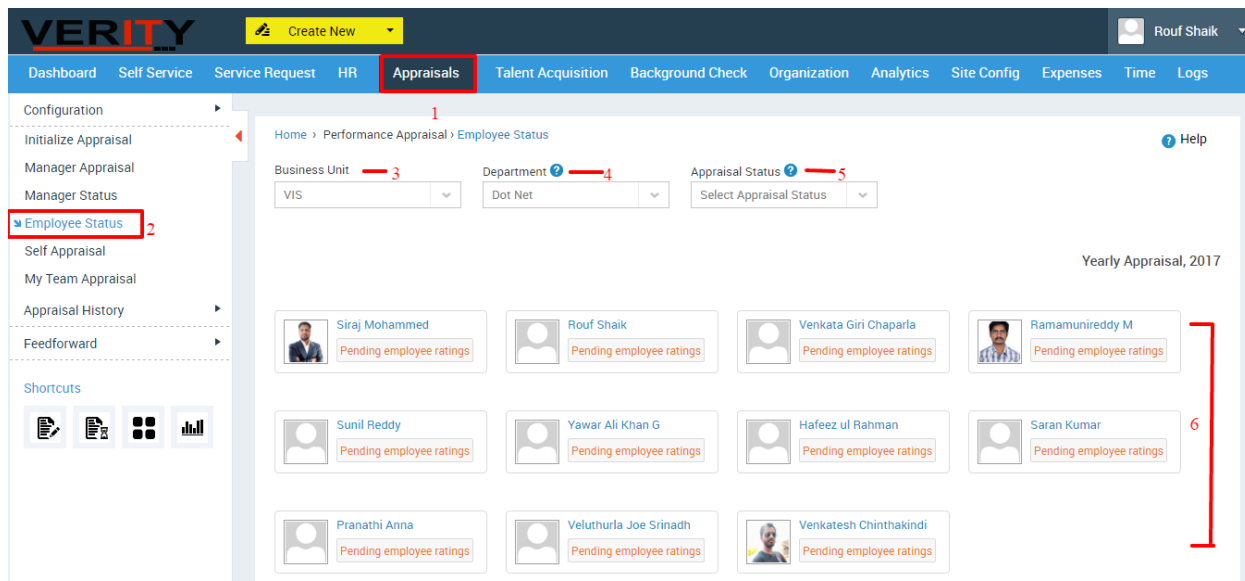


## Employee Status

HR and Management roles will be able to view the employee appraisal status.

1. Click on Appraisal in the header
2. Click on Employee Status in the left side menu
3. Select the Business unit
4. Select the Department
5. Select appraisal process if required
6. Employees and their appraisal status will be displayed

Refer figure 29



1. Click on Appraisals in the header

2. Click on Employee Status in the left side menu

3. Business Unit (VIS)

4. Department (Dot Net)

5. Appraisal Status (Select Appraisal Status)

6. Grid of employees with 'Pending employee ratings' status

## Self Appraisal

Self-appraisal is displayed to all the employees as each and every employee is subject to appraisal process. Here, the employees will provide self-appraisal details such as ratings and comments. Upon completion of self appraisal, their appraisal will be visible to their line managers for further ratings and comments

1. Click on Appraisal in the header
2. Click on Self Appraisal in the left side menu
3. The parameters are displayed above the questions grid
4. Provide ratings and comments for every question
5. Click on rating definition to know more about ratings
6. Click on send to manager to send it to manager
7. Click on save as draft to only save the appraisal process

Refer figure 31



VERITY

Create New

Employee Login

DashboardSelf ServiceService RequestHRAppearalsTalent AcquisitionBackground CheckOrganizationAnalyticsSite ConfigExpensesTimeLogs

Configuration

Initialize Appraisal

Manager Appraisal

Manager Status

Employee Status

Self Appraisal

My Team Appraisal

Appraisal History

Feedforward

Shortcuts

Home > Appraisals > Self Appraisal > Edit

Yearly Appraisal (Y1), 2017

Help

Rating Definition

Rouf Shaik  
VIS20110003  
Manager

Business Unit : VIS  
Department : Dot Net

Due Date : 28.04.2017

L1 Manager  
Ali Ahmed

Print

KPI

Question	Rating	Comments
<b>CLIENT FOCUS</b> Builds and sustains long term relationships with Internal and /or external clients based on mutual understanding.Trust and respect.Focuses on identifying and meeting client needs in most effective way	★★★★★	
<b>Business and Financial Focus</b> Drives for and focuses on business success and profitability, shows concern for financial stewardship and proper Management of financial resources.	★★★★★	
<b>Drive and Commitment</b> Has the determination, effort and enthusiasm to deliver results.Takes the initiative, originates action and moving.	★★★★★	
<b>Communication and Impact</b> Convey information clearly, accuratley and adjusts in the audiences needs and requirements. Has credibility and impact, uses a range of effective interpersonal skills to persuade others to adopt a par	★★★★★	
<b>Problem Analysis</b> Identifies and examines problems in order to understand them, generates options and recommends solutions which are logical , reasonable and realistic.	★★★★★	
<b>Resilience and Stress Management</b> Flexible, tolerates changes in methods, approaches and objectives. Maintains their performance and confidence in difficult, stressful, ambiguous and challenging circumstances.	★★★★★	
<b>Risk &amp; Professional Behaviour</b> Dependable, reliable and accountable for own behavior. Additionally acts within professional, legal, ethical and risk boundaries and guidelines,including the verity code of conduct and risk management	★★★★★	
<b>Quality and Continuous Improvement</b> Strives to enhance process and procedures, and improve quality and efficiency. Additionally , collates and capture organizational knowledge for the benefit of themselves and others.	★★★★★	
<b>Strategic Perspective and Global Awareness</b> Demonstrates a broad based view of business issue, events and activities and an understanding of their wider implications and long term impact.	★★★★★	

SAVE AS DRAFT

SEND TO L1 MANAGER

Clear

© VHRIS, 2016

Powered By Verity

Recently viewed

My Team Appraisal

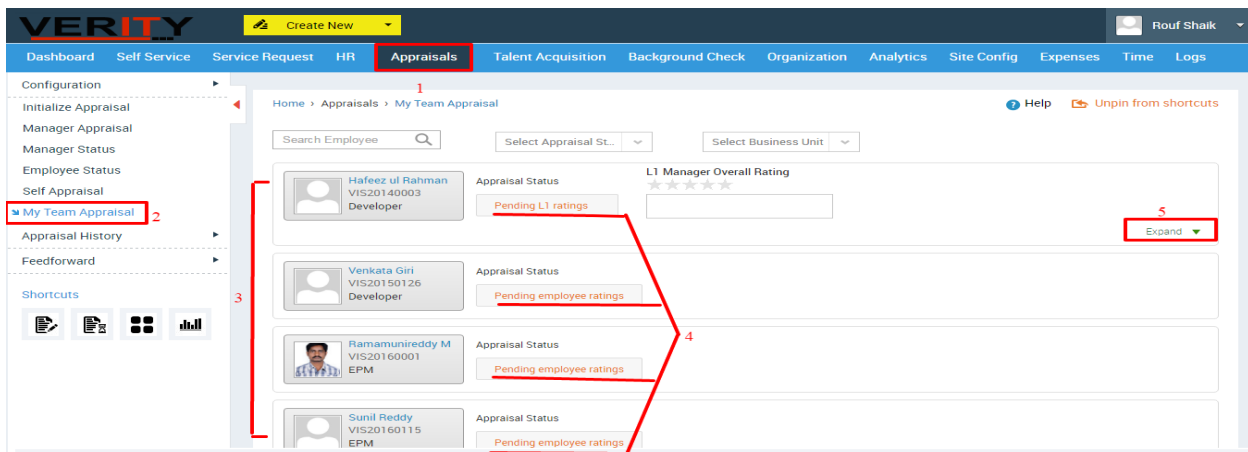


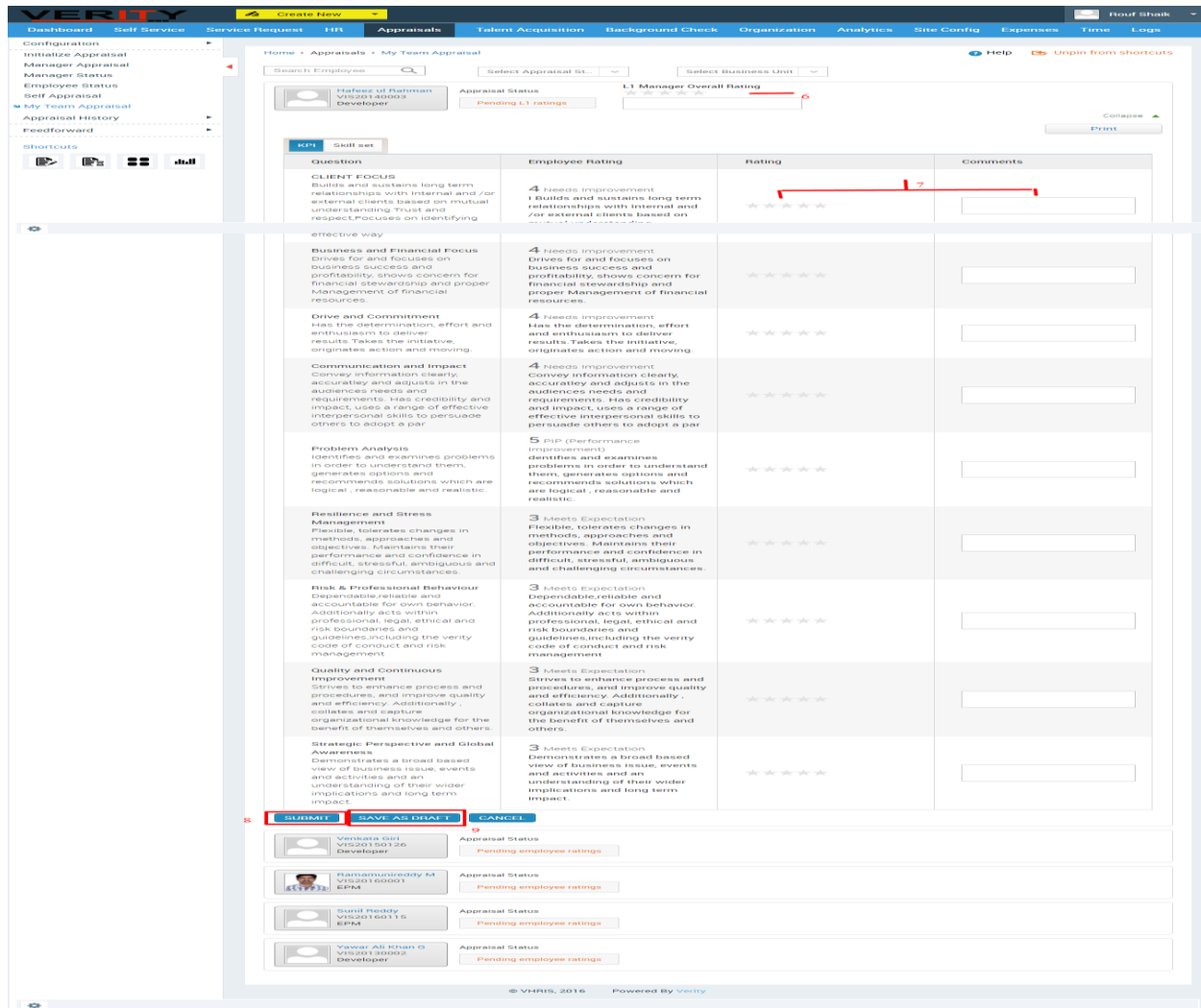
## My Team Appraisal

Managers will be able to view their team employee's appraisal status. Once the employees complete the appraisal process, the managers will be able to provide ratings and comments to the employees. Based on the levels of appraisal, the employee appraisal process will be enabled to the line managers.

1. Click on Appraisal in the header
2. Click on My Team Appraisal in the left side menu
3. All the employees in the managers team will be displayed
4. The status of each employee's appraisal is displayed
5. Click on Expand to provide Manager's rating
6. Provide overall rating and comment for an employee
7. Provide the rating and comments respectively
8. Click on Submit to send it for approval based on the levels of appraisal
9. Click on save as draft to save the ratings and comments

Refer figure 30





The screenshot displays the Verity HRIS Appraisal module. The top navigation bar includes links for Dashboard, Self Service, Service Request, HR, Appraisals, Talent Acquisition, Background Check, Organization, Analytics, Site Config, Expenses, Time, and Logs. The left sidebar contains a menu for Configuration (Initiate Appraisal, Manager Appraisal, Manager Status, Employee Status, Self Appraisal, My Team Appraisal, Appraisal History, Feedforward) and Shortcuts. The main content area shows the 'My Team Appraisal' view for employee Hafese ul Rahman (VRS0150126, Developer). The appraisal status is 'Pending L1 ratings'. A table lists various competencies with employee ratings and comments. At the bottom, there are buttons for SUBMIT, SAVE AS DRAFT, and CANCEL, followed by a list of other employees in the team.

QUESTION	Employee Rating	Rating	Comments
<b>CLIENT FOCUS</b> Builds and sustains long term relationships with internal and/or external clients based on mutual understanding, Trust and respect. Focuses on identifying effective way	4 Needs improvement Builds and sustains long term relationships with internal and/or external clients based on mutual understanding	★★★★☆	
<b>Business and Financial Focus</b> Drives for and focuses on business success and profitability, shows concern for financial stewardship and proper Management of financial resources.	4 Needs improvement Drives for and focuses on business success and profitability, shows concern for financial stewardship and proper Management of financial resources.	★★★★☆	
<b>Drive and Commitment</b> Has the determination, effort and enthusiasm to deliver results. Takes the initiative, originates action and moving.	4 Needs improvement Has the determination, effort and enthusiasm to deliver results. Takes the initiative, originates action and moving.	★★★★☆	
<b>Communication and Impact</b> Convey information clearly, accurately and adjusts in the audiences needs and requirements. Has credibility and impact, uses a range of effective interpersonal skills to persuade others to adopt a par	4 Needs improvement Convey information clearly, accurately and adjusts in the audiences needs and requirements. Has credibility and impact, uses a range of effective interpersonal skills to persuade others to adopt a par	★★★★☆	
<b>Problem Analysis</b> Identifies and examines problems in order to understand them, generates options and recommends solutions which are logical, reasonable and realistic.	5 Meets Expectation Identifies and examines problems in order to understand them, generates options and recommends solutions which are logical, reasonable and realistic.	★★★★★	
<b>Resilience and Stress Management</b> Flexible, tolerates changes in methods, approaches and objectives. Maintains their performance and confidence in difficult, stressful, ambiguous and challenging circumstances.	3 Meets Expectation Flexible, tolerates changes in methods, approaches and objectives. Maintains their performance and confidence in difficult, stressful, ambiguous and challenging circumstances.	★★★☆☆	
<b>Risk &amp; Professional Behaviour</b> Dependable, reliable and accountable for own behavior. Additionally acts within professional, legal, ethical and risk boundaries and guidelines, including the verity code of conduct and risk management.	3 Meets Expectation Dependable, reliable and accountable for own behavior. Additionally acts within professional, legal, ethical and risk boundaries and guidelines, including the verity code of conduct and risk management.	★★★☆☆	
<b>Quality and Continuous Improvement</b> Strives to enhance process and procedures, and improve quality and efficiency. Additionally, collates and capture organizational knowledge for the benefit of themselves and others.	3 Meets Expectation Strives to enhance process and procedures, and improve quality and efficiency. Additionally, collates and capture organizational knowledge for the benefit of themselves and others.	★★★☆☆	
<b>Strategic Perspective and Global Awareness</b> Demonstrates a broad based view of business issue, events and activities and an understanding of their wider implications and long term impact.	3 Meets Expectation Demonstrates a broad based view of business issue, events and activities and an understanding of their wider implications and long term impact.	★★★☆☆	

Buttons: SUBMIT, SAVE AS DRAFT, CANCEL

Employee List:

- VRS0150126 Developer (Pending employee ratings)
- Ramamurthy M VRS0150001 EPM (Pending employee ratings)
- Sund Reddy VRS0150115 EPM (Pending employee ratings)
- VRS0150002 Developer (Pending employee ratings)

## Feed Forward

Feed forward is the feedback given by the employees to appraise their respective line managers. All the configurations are done on management level. Once all the employees have appraised their managers, managers' appraisal process will be carried out by the management

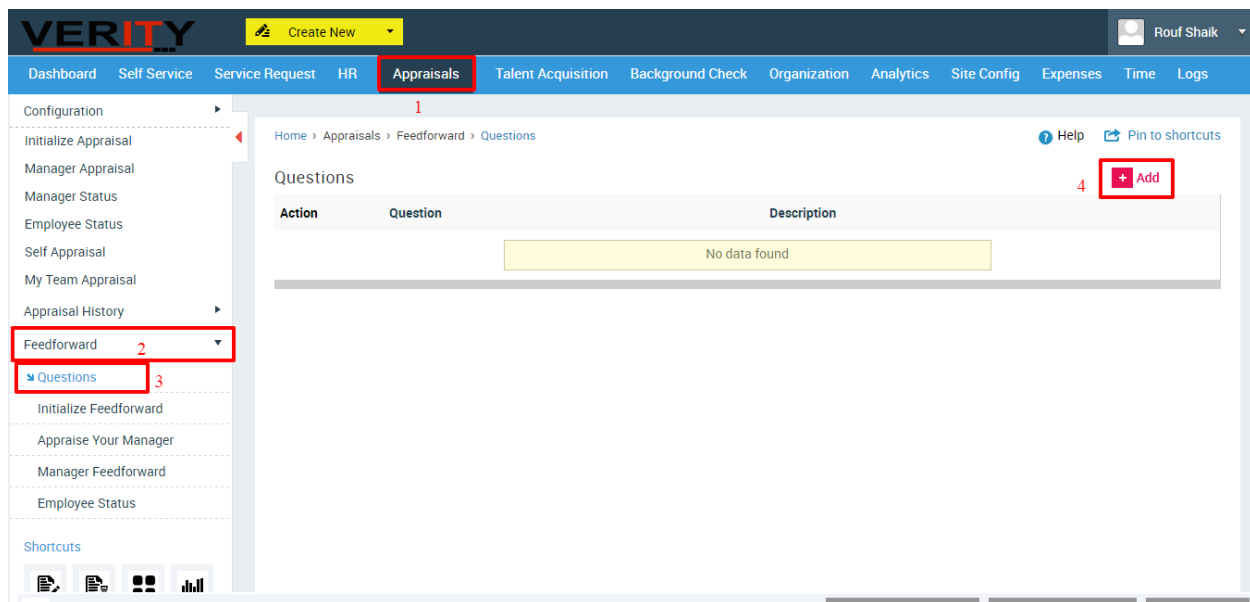


## Questions

Questions are added by the Management to evaluate manager's performance.

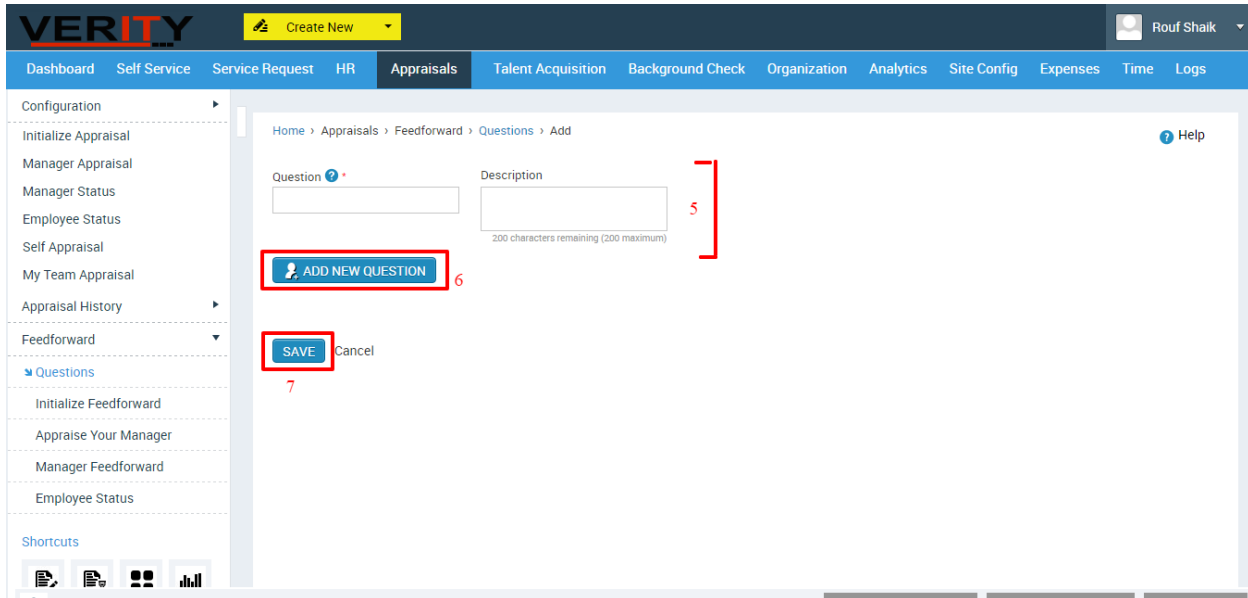
1. Click on Appraisal in the header
2. Click on Feed Forward in the left side menu
3. Click on questions in the submenu link
4. Click on add in the right side grid

Refer figure 32



5. Add the question and description if required
6. Click on Add New Question to add more questions
7. Click on Save

Refer figure 33



## Initialize feed forward

In the initialize feed forward page, only the appraisal that have "Closed" status are displayed.

**Before adding record in 'Initialize Feed Forward' screen, we have to close an appraisal.**

**Go to:**

1. Login as Manager
2. Click on Appraisal in the header
3. Click on Initialize appraisal in the left side menu
4. Click on Edit
5. Change appraisal status to 'Close'
6. Click on Ok
7. Click on 'Update'





VERITY Create New Login as manager Rof Shaik

Dashboard Self Service Service Request HR Appraisals Talent Acquisition Background Check Organization Analytics Site Config Expenses Time Logs

Configuration Initialize Appraisal 3 Manager Appraisal Manager Status Employee Status Self Appraisal My Team Appraisal Appraisal History Feedforward Shortcuts

Home > Appraisals > Initialize Appraisal

### Initialize Appraisal

Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
	VIS	Dot Net	2016-2017	Yearly	Yearly	Closed	Enabled to Employees
	VIS	Sales	2016-2017	Yearly	Yearly	Open	Enabled to Managers
	VIS	Testing	2016-2017	Yearly	Yearly	Open	Enabled to Managers
	VIS	SAP	2016-2017	Yearly	Yearly	Open	Enabled to Managers
	VIS	Mobile Apps	2016-2017	Yearly	Yearly	Open	Enabled to Managers
	VIS IT	Sales	2016-2017	Yearly	Yearly	Open	In progress

Records per page 20

Configuration Initialize Appraisal 3 Manager Appraisal Manager Status Employee Status Self Appraisal My Team Appraisal Appraisal History Feedforward Shortcuts

Home > Appraisals > Initialize Appraisal > Edit

Step 1 Initialization  
Initialize appraisal for a department or a business unit and enable to managers or employees  
Completed

Step 2 Configure Line Managers  
Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually  
Completed

Step 3 Configure Appraisal Parameters  
Set the appraisal parameters for all the employees or for an employee group for a department or a business unit  
Completed

### Appraisal Details

Business Unit	VIS	Department	Testing
Appraisal Mode	Yearly	From Year	2016
To Year	2017	Period	Yearly
Eligibility	Permanent	Parameters	KPI
Status	Open	Process Status	Enabled to Managers
Appraisal Status	Open	Managers' Due Date	30.05.2017
Enable To	Open	Employees' Due Date	
Appraisal Ratings	Close		

Alert

You are trying to close the appraisal.  
Appraisal has not been enabled to employees.

OK

### Appraisal Details

Business Unit	VIS	Department	Testi
Appraisal Mode	Yearly	From Year	2016

Then the closed record will be shown in 'Initialize Feed Forward'.



**Appraisal:** Select the appraisal from the populated dropdown. The appraisal details grid is displayed in the screen where Business Unit, Department, Appraisal Mode, From Year, To Year and Period are displayed.

**Status:** Feed Forward status will be "Open" by default Upon the initialization of feed forward, close and force close options will be made available

- ▶ **Force Close:** Closes the Appraisal Process by force. Appraisal Process for the selected Business Unit can be configured again and for the same appraisal period.
- ▶ **Close:** Closes the appraisal process for the selected business unit permanently

**Employee Details:** Here, the Management will determine if the management can view only the feedback given by the employee or the feedback along with the employee names.

Show: Employee names and their feedback will be displayed

**Hide:** Only the feedback will be displayed

**Enable to:** The Management will determine if all employees can appraise their managers or only the employees eligible for appraisal

**Appraisal Employees:** All the employees eligible for appraisal process can appraise their managers.

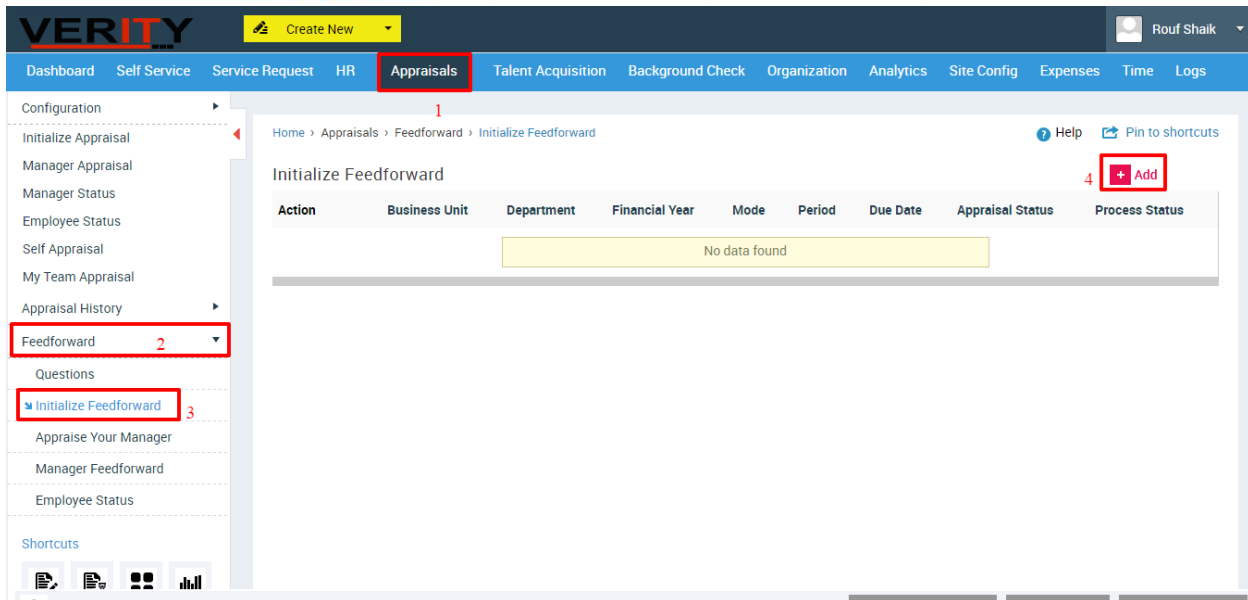
**All Employees:** All the employees in the organization can appraise their managers.

**Due Date:** The due date is for closing the feed forward process for employees.

**Configure Questions:** All the questions added by the Management will be displayed. If more questions are to be added, Add New Question link is also provided.

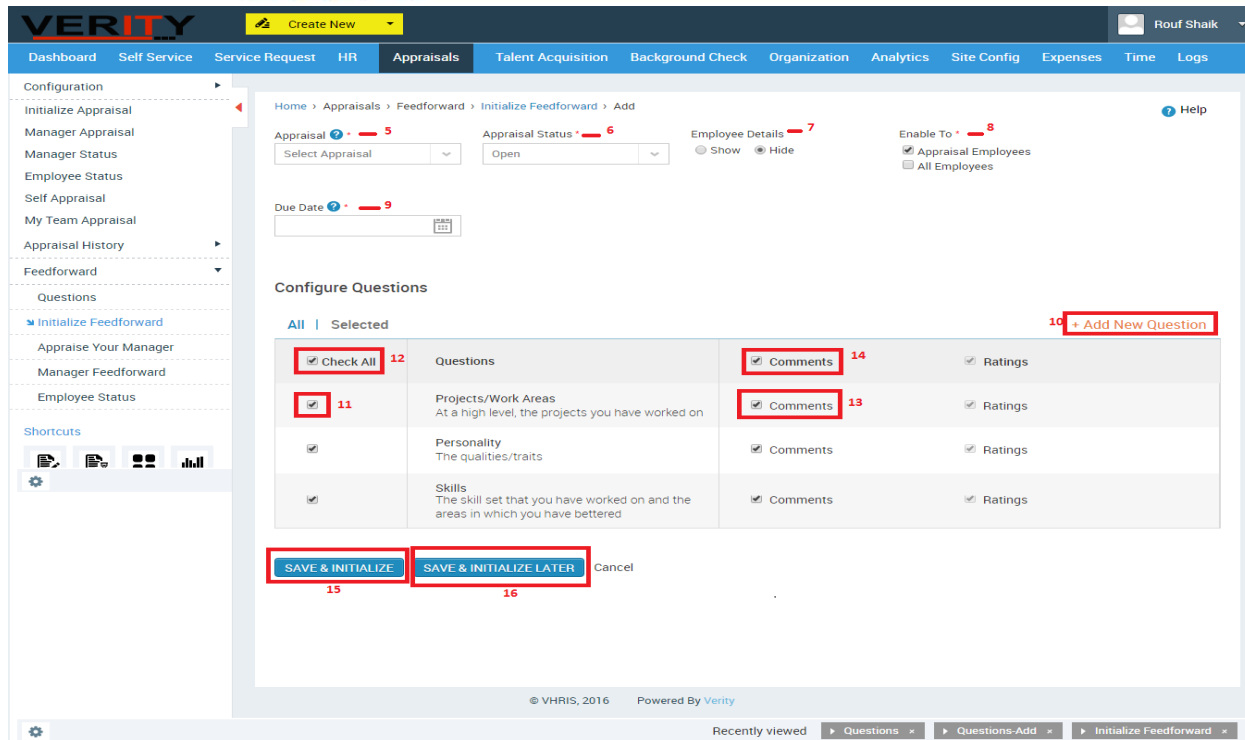
1. Click on Appraisal in the header
2. Click on Feed Forward in the left side menu
3. Click on Initialize feed forward in the submenu links
4. Click on add in the right side grid

Refer figure 34



5. Select an appraisal process from the appraisal drop down
6. Define whether or not you want to view the employee details along with their feedback ratings and comments
7. Enable Feed Forward to all employees or only to employees who are eligible for Appraisal process
8. Pick a date for employees to provide their feedback
9. Click on Add New Question to add questions for Feed Forward
10. Select questions individually by checking the checkbox respective to each question Or
11. Select all the questions by checking the Check All option in the table header
12. Select comments individually for all the questions Or
13. Select comments by checking the Comments checkbox in the table header
14. Click on Save & Initialize to initialize the Feed Forward process
15. Click on Save & initialize later to only save the feed forward process

Refer figure 35

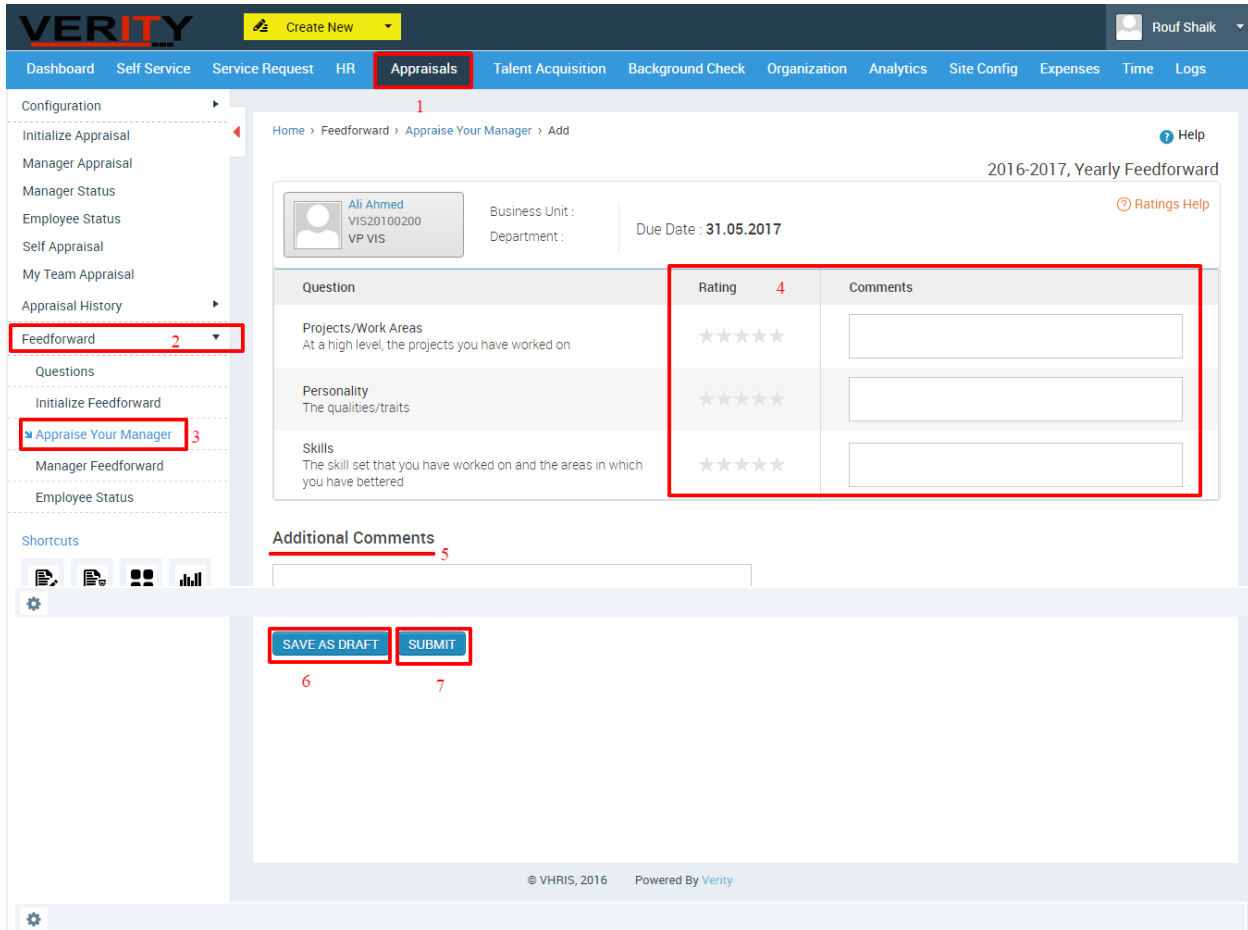


## Appraise Your Managers

The employees will be able to view the questions established to appraise their line managers. They can provide ratings and comments for each question and the manager feed forward is submitted.

1. Click on Appraisal in the header
2. Click on Feed Forward in the left side menu
3. Click on Appraise Your Manager in the submenu links
4. Provide ratings and comments
5. Enter additional comments (not mandatory)
6. Click on save as draft to save feed forward
7. Click on submit to submit feed forward

Refer figure 36



The screenshot shows the Verity HRIS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals' (highlighted with a red box and labeled '1'), 'Talent Acquisition', 'Background Check', 'Organization', 'Analytics', 'Site Config', 'Expenses', 'Time', and 'Logs'. The left sidebar contains a 'Configuration' menu with 'Feedforward' (labeled '2') and 'Appraise Your Manager' (labeled '3') highlighted. The main content area is titled '2016-2017, Yearly Feedforward' and shows a form for 'Ali Ahmed' (VP VIS) with a due date of '31.05.2017'. The form includes a table for 'Questions' with columns for 'Rating' (labeled '4') and 'Comments'. The table has three rows: 'Projects/Work Areas', 'Personality', and 'Skills'. Below the table is an 'Additional Comments' section (labeled '5') with a text area. At the bottom are 'SAVE AS DRAFT' (labeled '6') and 'SUBMIT' (labeled '7') buttons. The footer shows '© VHRIS, 2016' and 'Powered By Verity'.

Question	Rating	Comments
Projects/Work Areas At a high level, the projects you have worked on	★★★★★	
Personality The qualities/traits	★★★★★	
Skills The skill set that you have worked on and the areas in which you have bettered	★★★★★	

## Manager Feed Forward

Before going to 'Manager Feed Forward' we have to close appraisal status in initialize feed forward.

Go to:

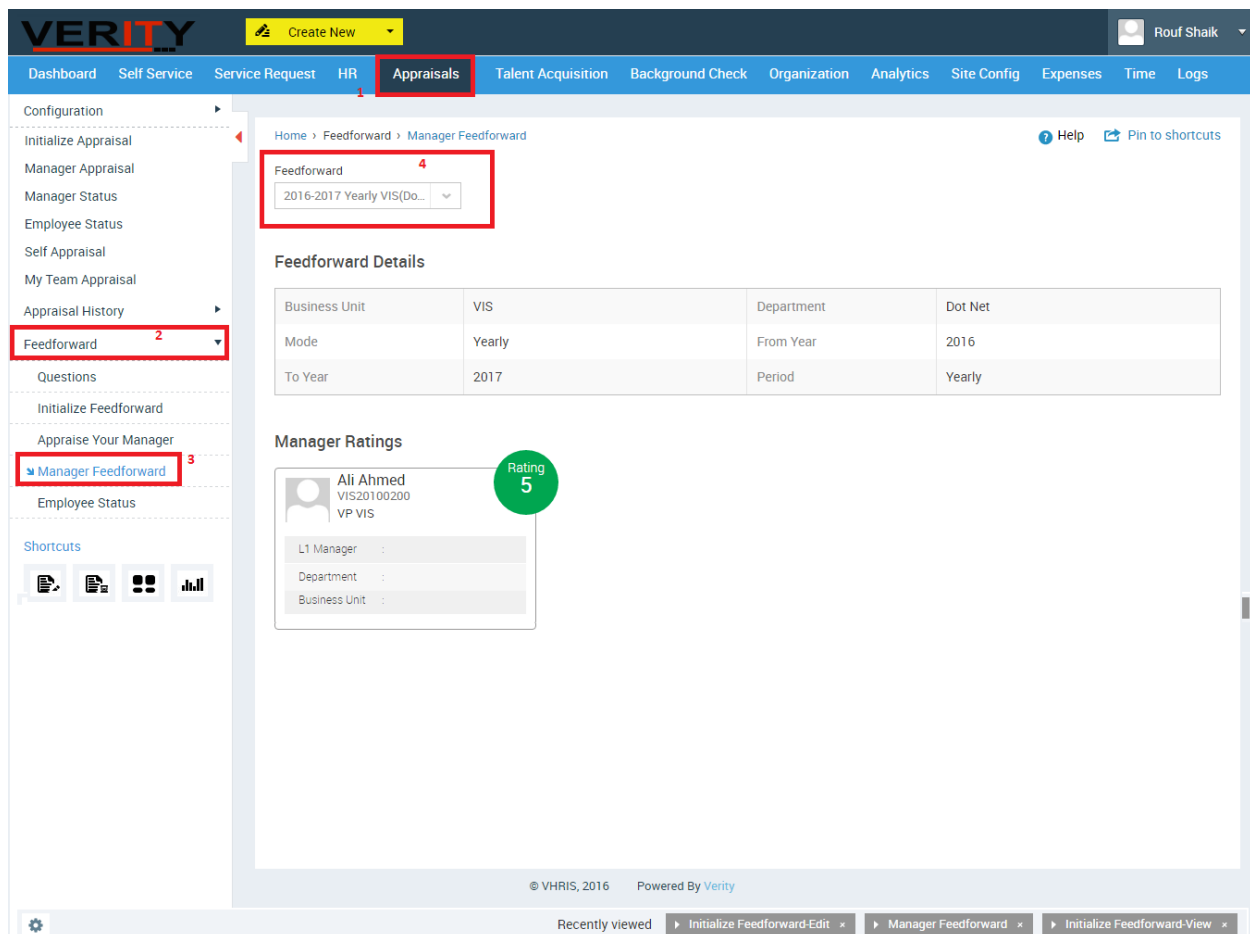
1. Click on Appraisal
2. Click on Feed Forward in the left side menu
3. Click on Initialize feed forward submenu
4. Open a record in edit mode
5. Change appraisal status to close



Only the Management will be able to view managers feed forward. Upon selection of appraisal from the dropdown, feed forward details a long with the manager ratings are displayed. The average ratings of all the employee will be highlighted. A detailed description of comments and ratings of employees are displayed by question or by employee.

1. Click on Appraisal in the header
2. Click on Feed Forward in the left side menu
3. Click on Manager feed Forward in the submenu links
4. Select a process to feed forward details in the drop down

Refer figure 37



The screenshot displays the Verity HRIS system interface. The top navigation bar includes the Verity logo, a 'Create New' button, and a user profile for 'Rouf Shaik'. The main navigation menu on the left lists various HR functions, with 'Appraisals' highlighted. The 'Appraisals' submenu is expanded, showing 'Feedforward' (2) and 'Manager Feedforward' (3). The 'Feedforward' dropdown is selected, showing '2016-2017 Yearly VIS(Do...)' (4). The main content area displays 'Feedforward Details' and 'Manager Ratings'.

**Feedforward Details**

Business Unit	VIS	Department	Dot Net
Mode	Yearly	From Year	2016
To Year	2017	Period	Yearly

**Manager Ratings**

Ali Ahmed  
VIS20100200  
VP VIS

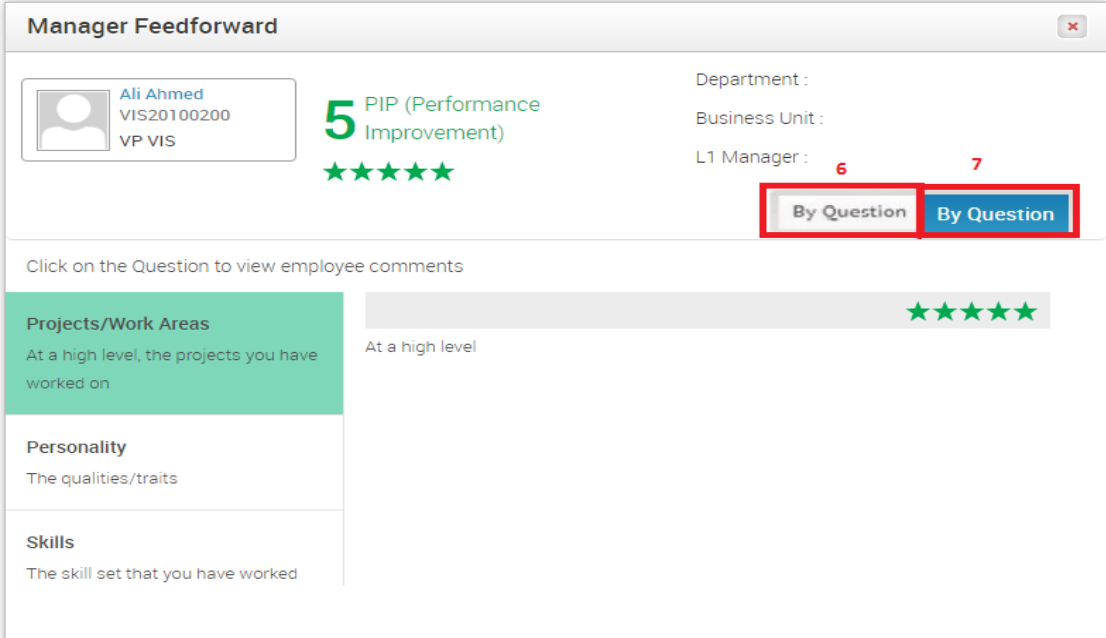
Rating 5

L1 Manager :  
Department :  
Business Unit :



5. Click on individual manager section to view the ratings and comments provided by employees
6. Select By Questions to view the ratings and comments based on questions
7. Select By Employee to view the ratings and comments of each employee

Refer figure 38



Manager Feedforward

Ali Ahmed  
VIS20100200  
VP VIS

5 PIP (Performance Improvement)  
★★★★★

Department :  
Business Unit :  
L1 Manager :

By Question By Question

Click on the Question to view employee comments

Projects/Work Areas  
At a high level, the projects you have worked on

Personality  
The qualities/traits

Skills  
The skill set that you have worked

★★★★★  
At a high level

## Employee Status

Management will be able to view the feed forward status of all the employees.

1. Click on Appraisal in the header
2. Click on Feed Forward in the left side menu
3. Click on Employee Status in the submenu links
4. Select a process to Feed Forward details in the dropdown
5. The employees of the selected process along with their Feed Forward status will be displayed



Refer figure 39

