



Sentrifugo
open source HRMS

3.0 User Guide

Sentrifugo

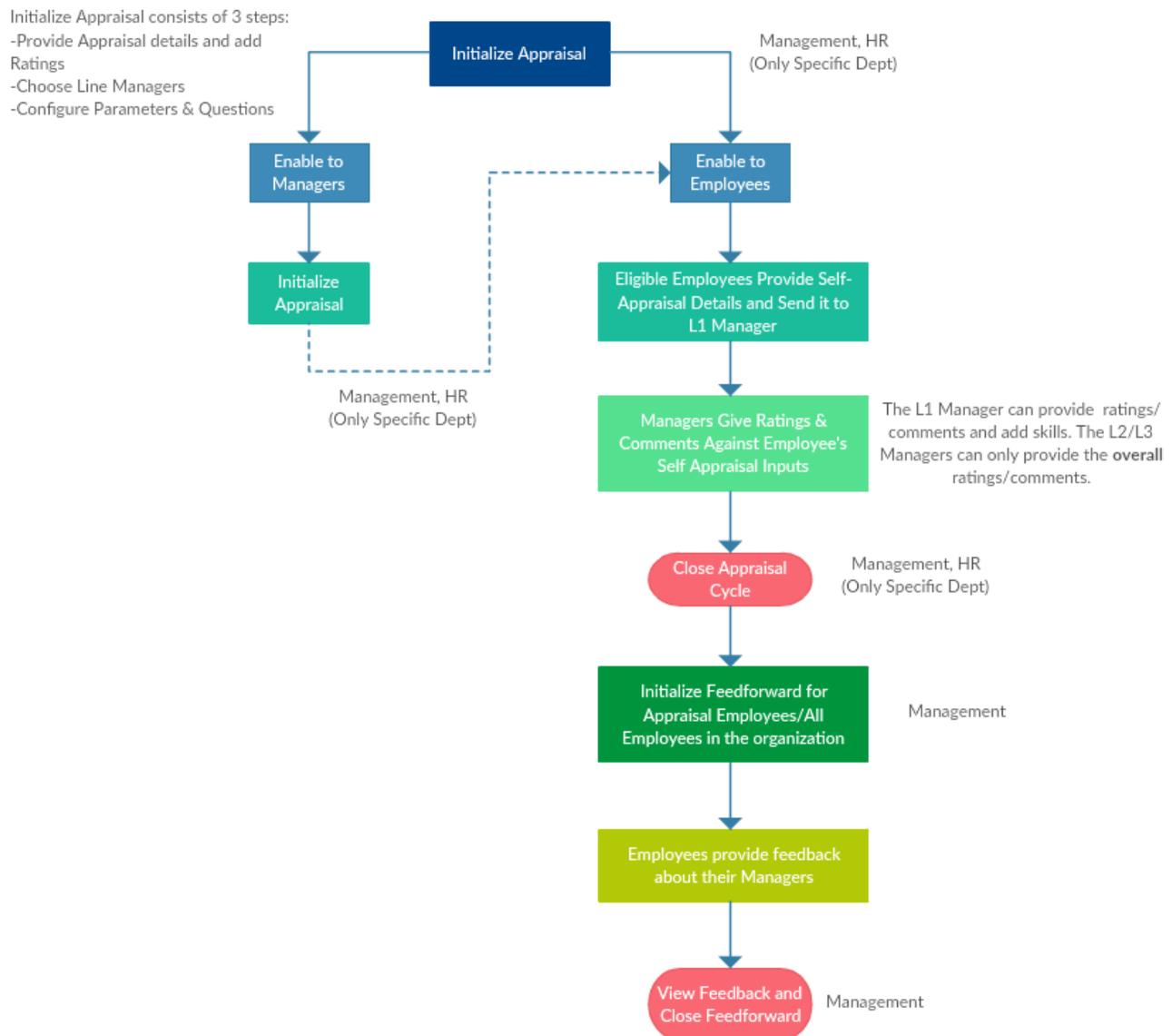
Appraisal Guide

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Introduction

Performance Appraisal is a systematic evaluation of Employees' performance and to understand their abilities for further career transition. It is generally done by the supervisors on the basis of factors such as parameters, questions, ratings etc. In Sentrifugo, the appraisal is configured for an entire business unit or for a specific department. Below is the flowchart of the appraisal process followed in Sentrifugo:



Process Description:

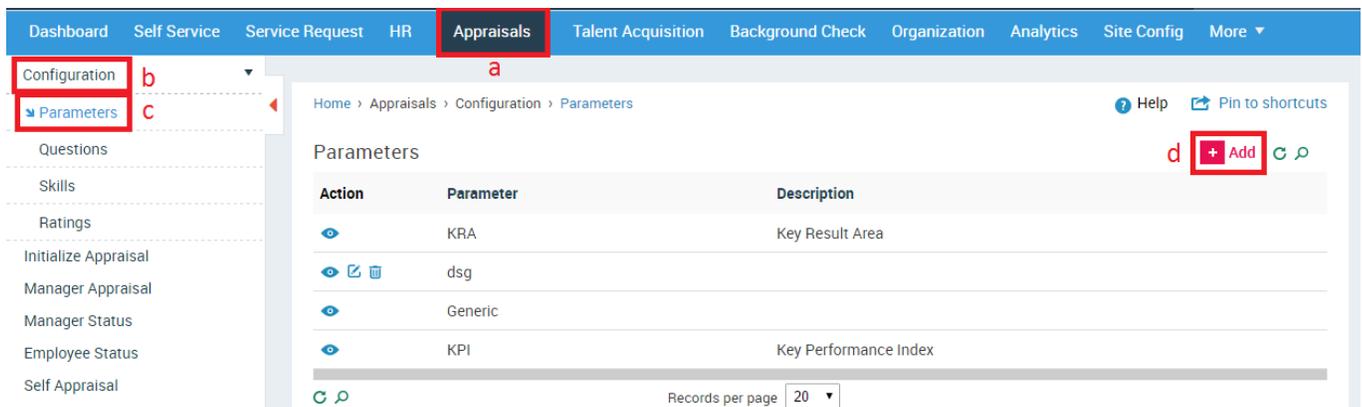
- A User (Management/HR for only specific department) initializes an appraisal
- The appraisal can be enabled to Managers/Employees

- If it is initialized to the Managers first, then they can assign questions in addition to the ones set by the User who initialized the appraisal.
- After the Managers submit their questions, the appraisal can be enabled to the Employees. (If you don't require a Manager to provide additional questions, then you can directly enable the appraisal to the Employees)
- The eligible Employees will submit their self-appraisal and send it to their L1 Manager.
- L1 Managers will provide their comments and ratings for each question and overall comment and rating for the Employees
- Depending on the number of appraisal levels selected, the L2/L3.. Managers can only provide overall rating and comment
- The User will close the appraisal cycle
- Management will initialize feedforward for Employees who have completed their appraisal or for all Employees
- Employees will provide feedback about their Managers
- Management will view the feedback and close the feedforward process

How do I add Parameters?

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

Please refer Figure 1



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar is blue and contains several menu items: Dashboard, Self Service, Service Request, HR, **Appraisals** (labeled 'a'), Talent Acquisition, Background Check, Organization, Analytics, Site Config, and More. The left sidebar is white and contains a list of menu items: Configuration (labeled 'b'), Parameters (labeled 'c'), Questions, Skills, Ratings, Initialize Appraisal, Manager Appraisal, Manager Status, Employee Status, and Self Appraisal. The main content area is white and shows the 'Parameters' configuration page. The breadcrumb trail is 'Home > Appraisals > Configuration > Parameters'. The page title is 'Parameters'. In the top right corner, there is a '+Add' button (labeled 'd') and a refresh icon. Below the title, there is a table with the following columns: Action, Parameter, and Description. The table contains four rows: 1. Action: eye icon, Parameter: KRA, Description: Key Result Area. 2. Action: eye, edit, and trash icons, Parameter: dsg, Description: (empty). 3. Action: eye icon, Parameter: Generic, Description: (empty). 4. Action: eye icon, Parameter: KPI, Description: Key Performance Index. At the bottom of the table, there is a 'Records per page' dropdown menu set to '20'.

Figure 1

- Click **Appraisals** in the top menu
- Click **Configuration** on the left menu panel
- Click **Parameters** in the submenu
- Click **+Add** button on the right side

Please refer Figure 2

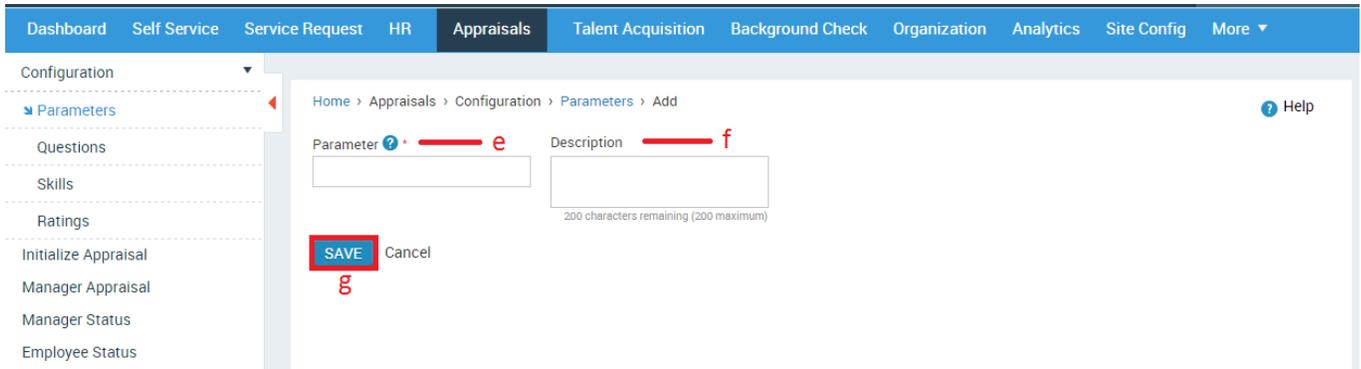


Figure 2

- e. Enter the parameter
- f. Provide Description
- g. Click **SAVE** button

How do I add Questions?

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

Please refer Figure 3

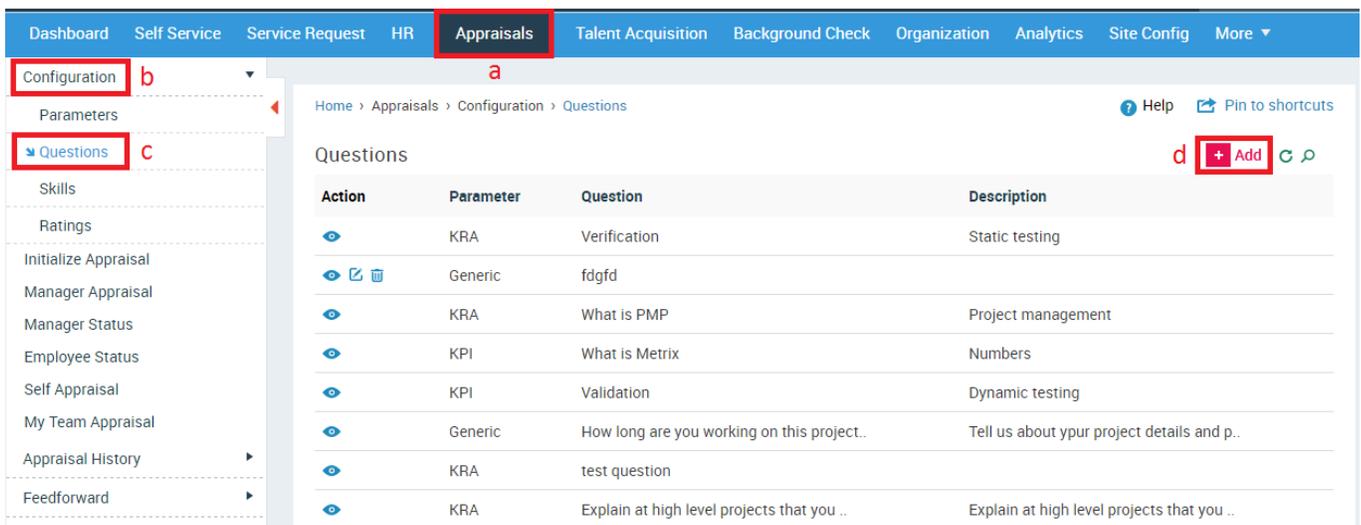


Figure 3

- a. Click **Appraisals** in the top menu
- b. Click **Configuration** on the left menu panel
- c. Click **Questions** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 4

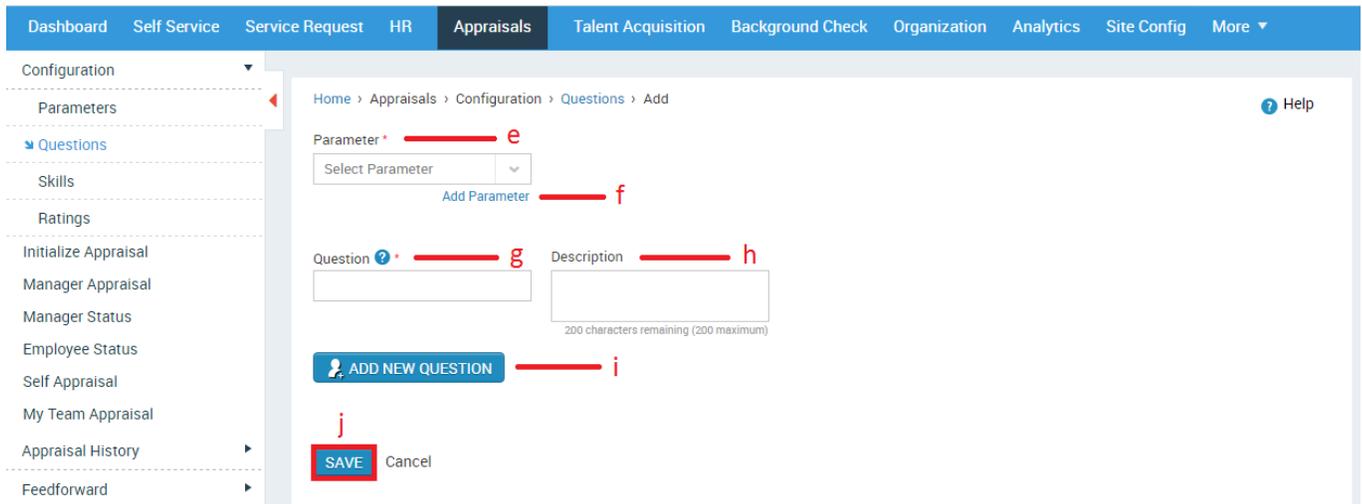


Figure 4

- e. Select a parameter from dropdown
- f. Add other parameter
- g. Enter the question
- h. Provide description
- i. Click **ADD NEW QUESTION** to add a new question
- j. Click **SAVE** button

How do I add Skills?

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

Please refer Figure 5

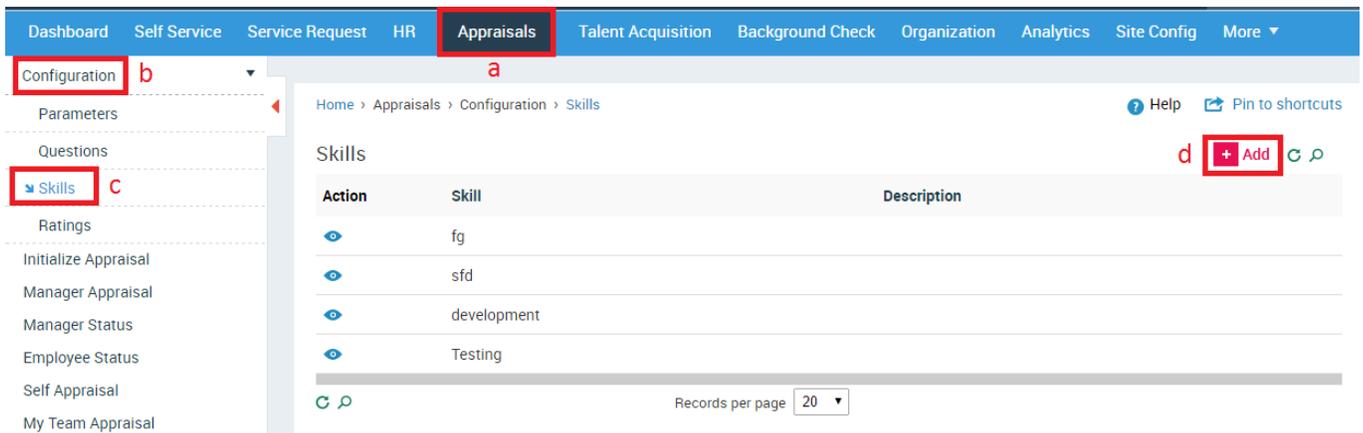


Figure 5

- a. Click **Appraisals** in the top menu
- b. Click **Configuration** on the left menu panel
- c. Click **Skills** in the submenu
- d. Click **+Add** button on the right side

Please refer Figure 6

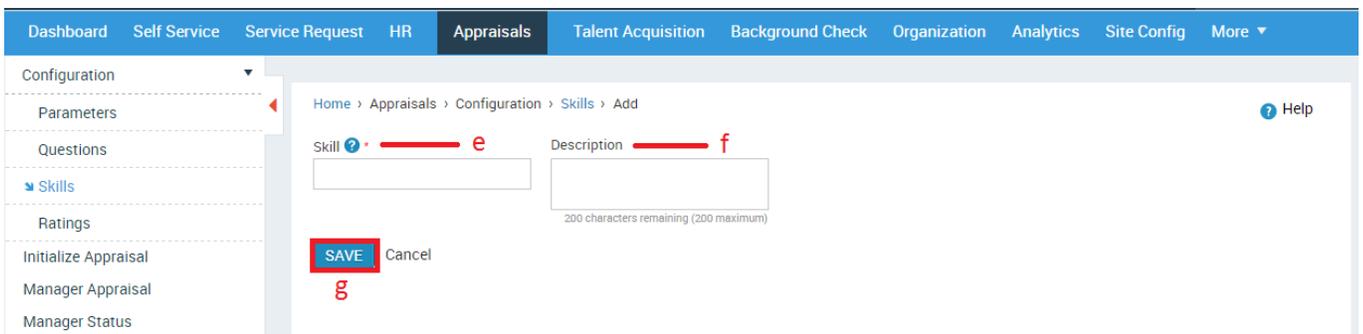


Figure 6

- e. Enter the skill
- f. Provide description if necessary
- g. Click **SAVE** button

How do I add Ratings?

You can add Ratings after completing the first step of Initialize Appraisal. This option is only for editing existing Ratings, provided Employees have not initiated the self-appraisal process

Ratings are defined for each business unit or department. The rating scales 1-5 and 1-10 are available in Sentrifugo.

Please refer Figure 7



Figure 7

- a. Click **Appraisals** in the top menu
- b. Click **Configuration** on the left menu panel
- c. Click **Ratings** in the submenu
- d. Click **Edit** icon on the right side

Please refer Figure 8

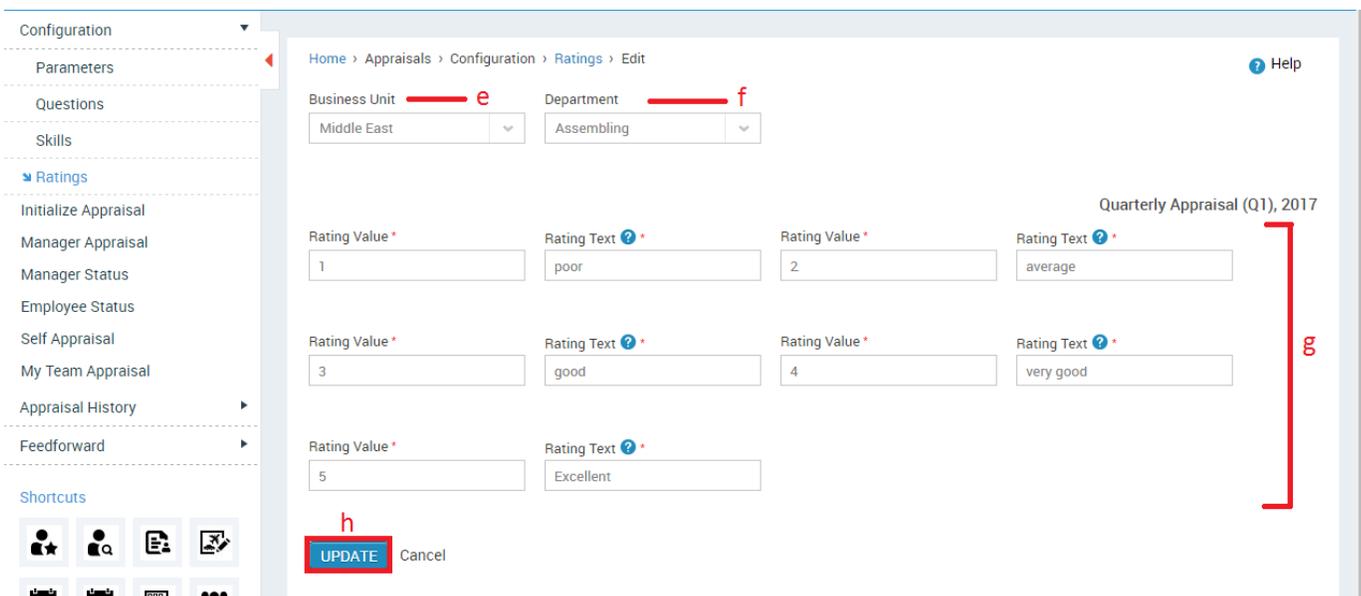


Figure 8

- e. Select a Business Unit from the dropdown list
- f. Select a Department from the dropdown list
- g. Provide rating text for each rating value
- h. Click **UPDATE** to save the ratings

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

How do I Initialize an Appraisal process?

Please refer Figure 9



Home > Appraisals > Initialize Appraisal

Initialize Appraisal C **+ Add** ↻ ↺

Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
	Asiaglobal	asdf	2019-2019	Quarterly	Q1	Open	In progress
	Middle East	Assembling	2016-2017	Quarterly	Q1	Open	In progress
	Asiaglobal	Human Resource	2017-2018	Quarterly	Q2	Open	Enabled to Employees
	No Business Unit	tes	2016-2017	Quarterly	Q1	Open	In progress
	Asiaglobal	QualityAssurance	2016-2017	Quarterly	Q1	Open	Enabled to Employees

Figure 9

- a. Click **Appraisals** in the top menu
- b. Click **Initialize Appraisal** on the left menu panel
- c. Click **+Add** button

Please refer Figure 10

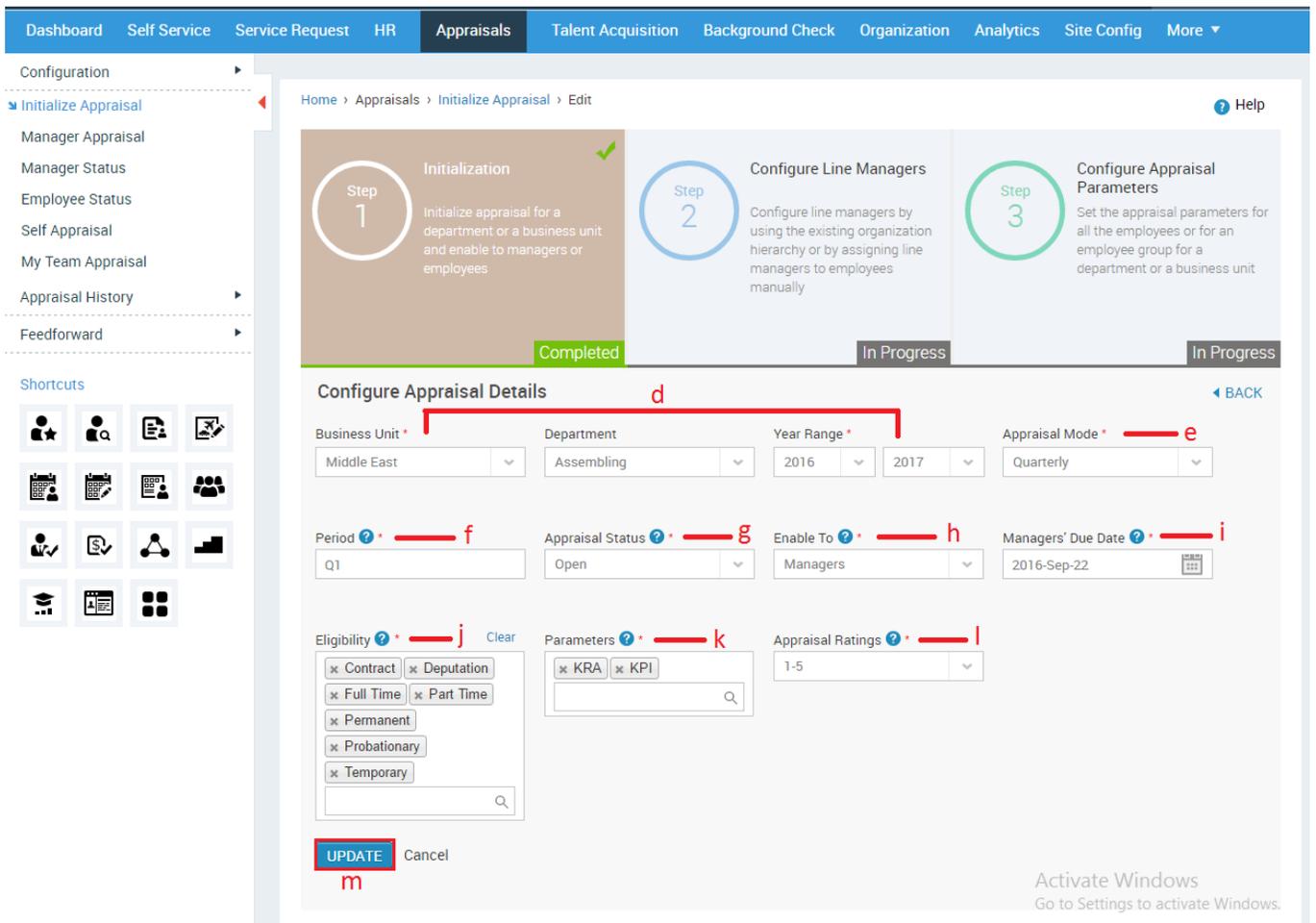


Figure 10

Step 1: Initialization

- d. Enter the required details (Business Unit, Department, Year Range)
- e. There are 3 appraisal modes available: Quarterly (Q1, Q2, Q3, Q4), Half-Yearly (H1, H2), Yearly
- f. Period will be populated automatically depending on the appraisal mode you have selected
- g. Appraisal Status is by default 'Open' in Initialize appraisal
- h. Select an option in 'Enable To' dropdown. You can enable to Managers/Employees
- i. Based on the Enable To option, set a due date for the Employees/Managers to submit the appraisal details
- j. Select one or more eligibility criteria (Employees who are eligible for the appraisal process)
- k. Select parameter(s)
- l. Select a Ratings range (1-5 or 1-10)
- m. Click **SAVE** button to initialize appraisal for a Business Unit/Department

You will need to define the ratings before you proceed to **Step 2**.

Please refer Figure 11



⊘ Ratings not added for the appraisal. Click here to configure ratings. a

Figure 11

- a. Click here to provide text to represent the rating numbers

Please refer section [How do I add Ratings?](#) to find out how to provide rating text.

Step 2: Configure Line Managers

Once the appraisal process is initiated for a Business Unit/Department, the Line Managers must be configured to evaluate the Employees' appraisal.

The Line Managers can be configured in two ways:

1. Choose by Organization Hierarchy

- Establish appraisal process as per the organization hierarchy where the Line Managers will be the same as the Reporting Managers
- 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

Please refer Figure 12

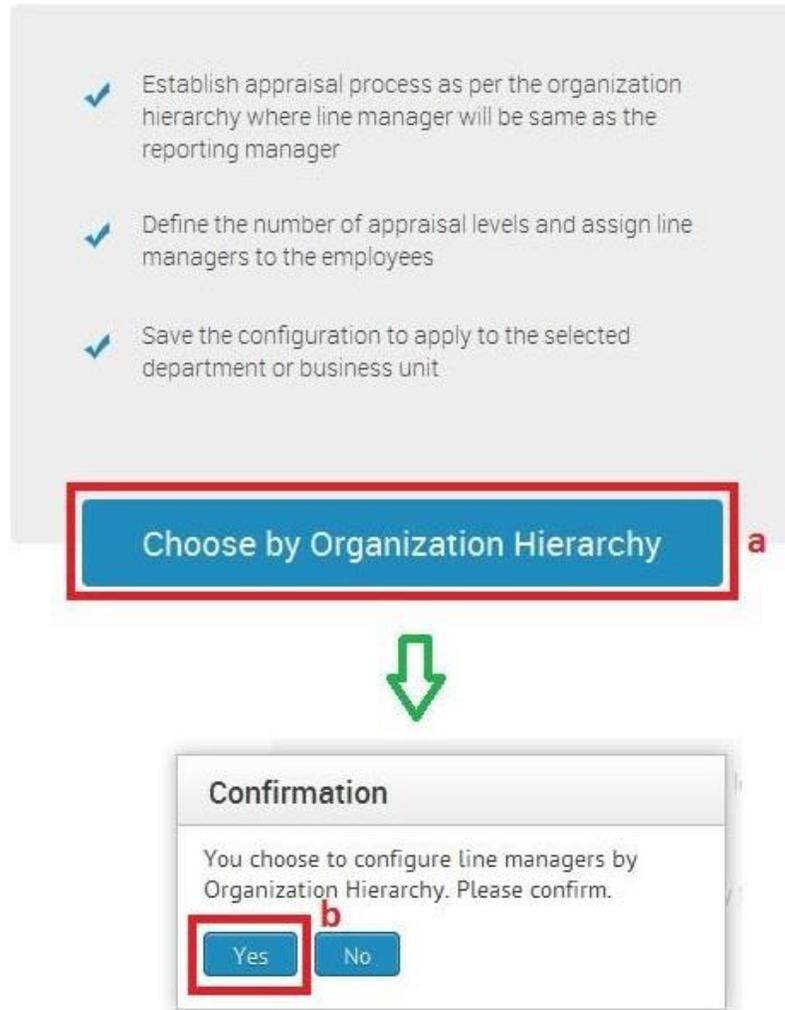


Figure 12

- a. Click **Choose by Organization Hierarchy** button

A small confirmation window will appear.

- b. Click **Yes** button

Please refer Figure 13

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 : General Administration Department : Hardware Quarterly Appraisal (Q1), 2016

Configure Line Managers by Organization Hierarchy ◀ BACK

 Raj Davuluri SE0006 Admin Head	L1 Manager	Employee(s) 1	d 
 George Rimes SE0011 Manager	L1 Manager	Employee(s) 1	

c

SAVE

Figure 13

- c. Manager(s)' names will be displayed
- d. Click here to view the Employees reporting to the displayed Managers

Please refer Figure 14

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 : General Administration Department : Hardware Quarterly Appraisal (Q1), 2016

Configure Line Managers by Organization Hierarchy ◀ BACK



Raj Davuluri
SE0006
Admin Head

L1 Manager

Employee(s)
1

⬆

Employees under L1 Manager



George Rimes
(SE0011)
Manager

e

Configure Line Managers

Select Appraisal Levels

▼
f

L2 Manager

▼
g

h

SAVE

CANCEL

Figure 14

- e. The Employees reporting to the Manager will be displayed here
- f. Select the number of appraisal levels you want (We have selected '2' in this example). You can have a maximum of 5 appraisal levels.
- g. Select your L1/L2... Manager(s)
- h. Click **SAVE** button



If you have only 1 appraisal level, then you don't need to select any appraisal level. Click **SAVE** button to proceed to the next step.

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

Please refer Figure 15

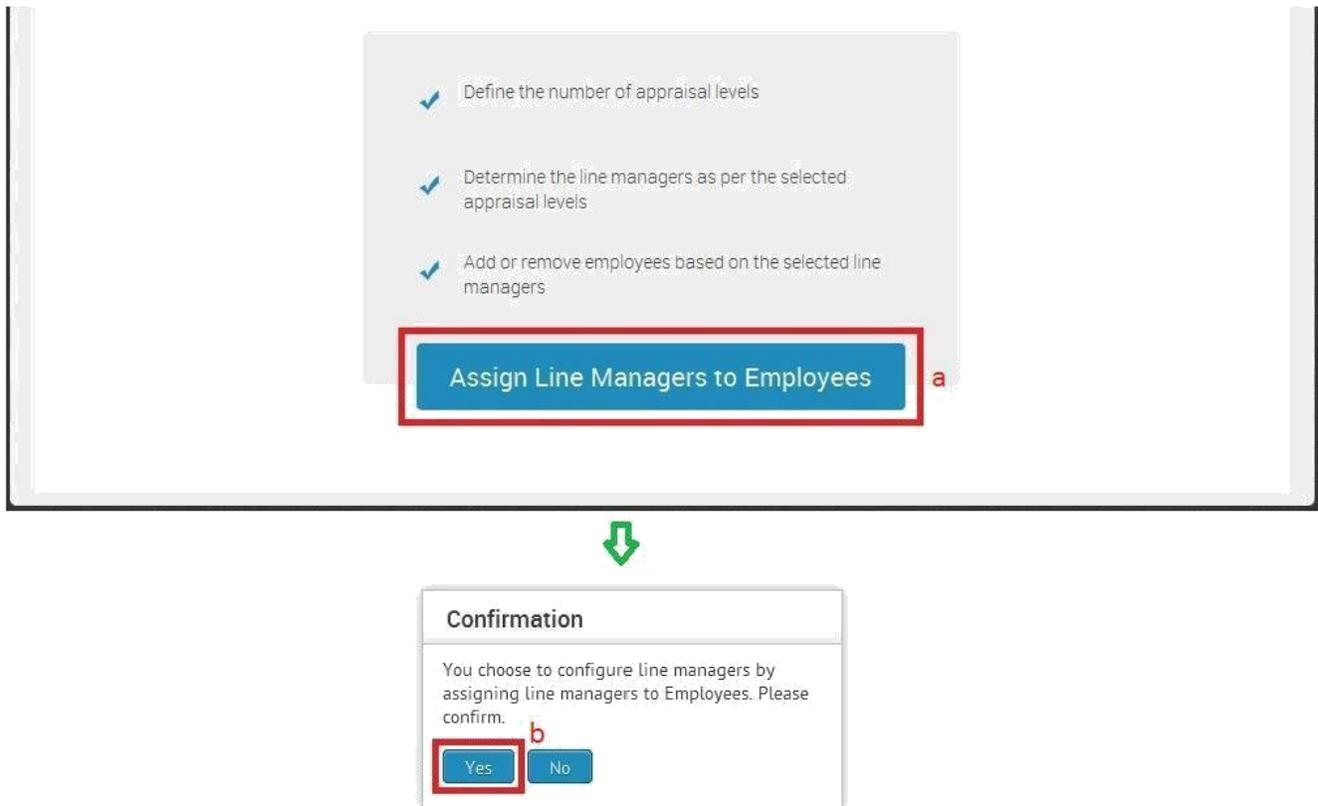


Figure 15

a. Click **Assign Line Managers to Employees**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 16

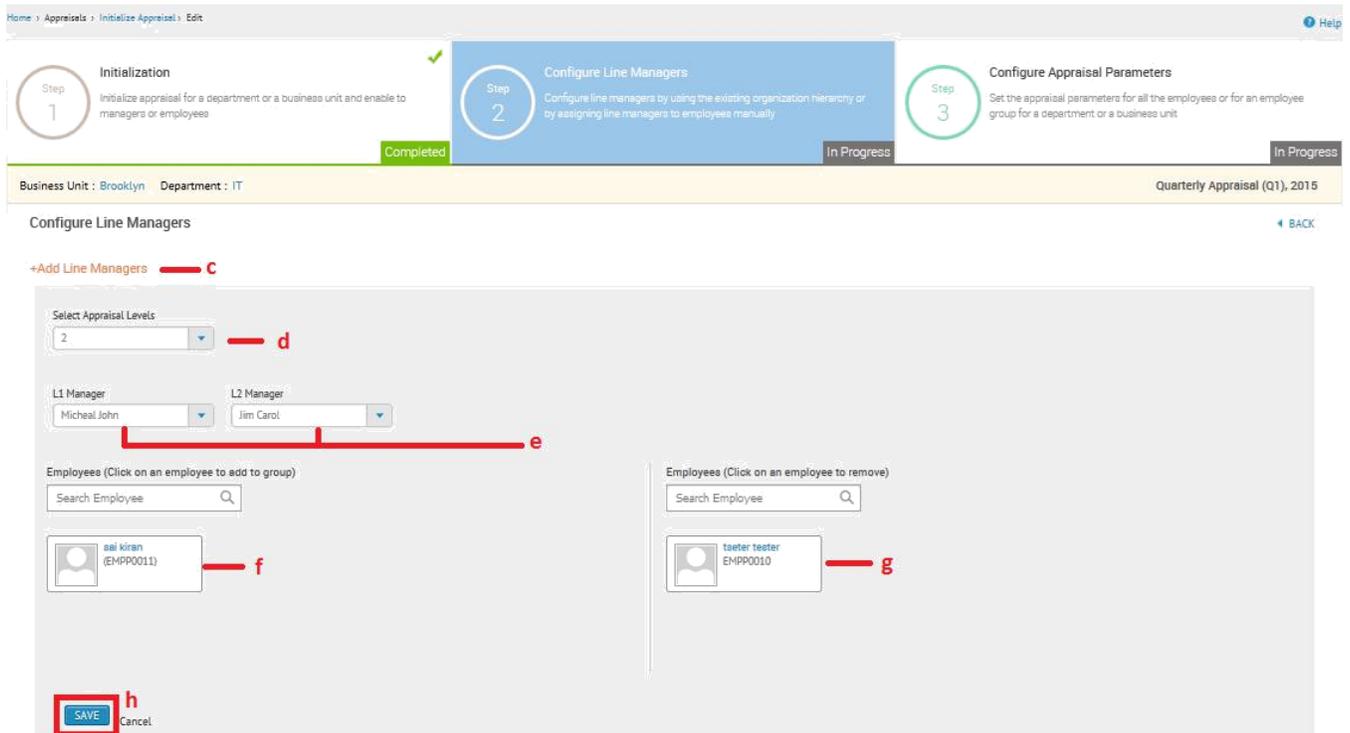


Figure 16

- c. Click **+Add Line Managers**
- d. Select the number of appraisal levels
- e. Based on the number of appraisal levels, select the Line Managers
- f. Employees are displayed on the bottom left
- g. Click on the Employee(s) on the left side to select them for the appraisal process
- h. Click **SAVE** button

Step 3: Configure Appraisal Parameters

Configure the appraisal parameters after configuring the Line Managers. Here, the appraisal process can be made applicable to all Employees of the **Business Unit** or **Customized Employee Groups**. 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

Please refer Figure 17

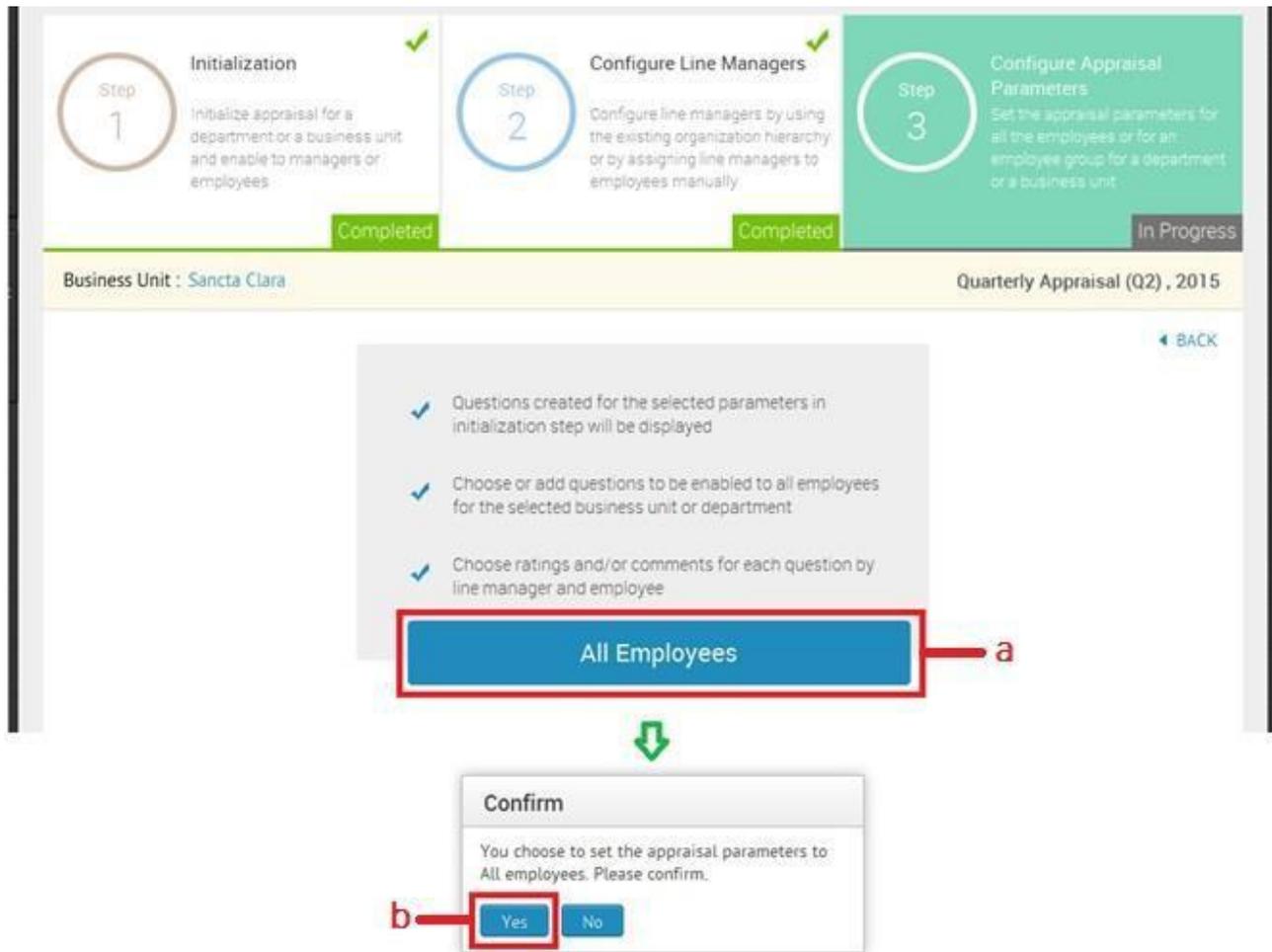


Figure 17

a. Click **All Employees**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 18

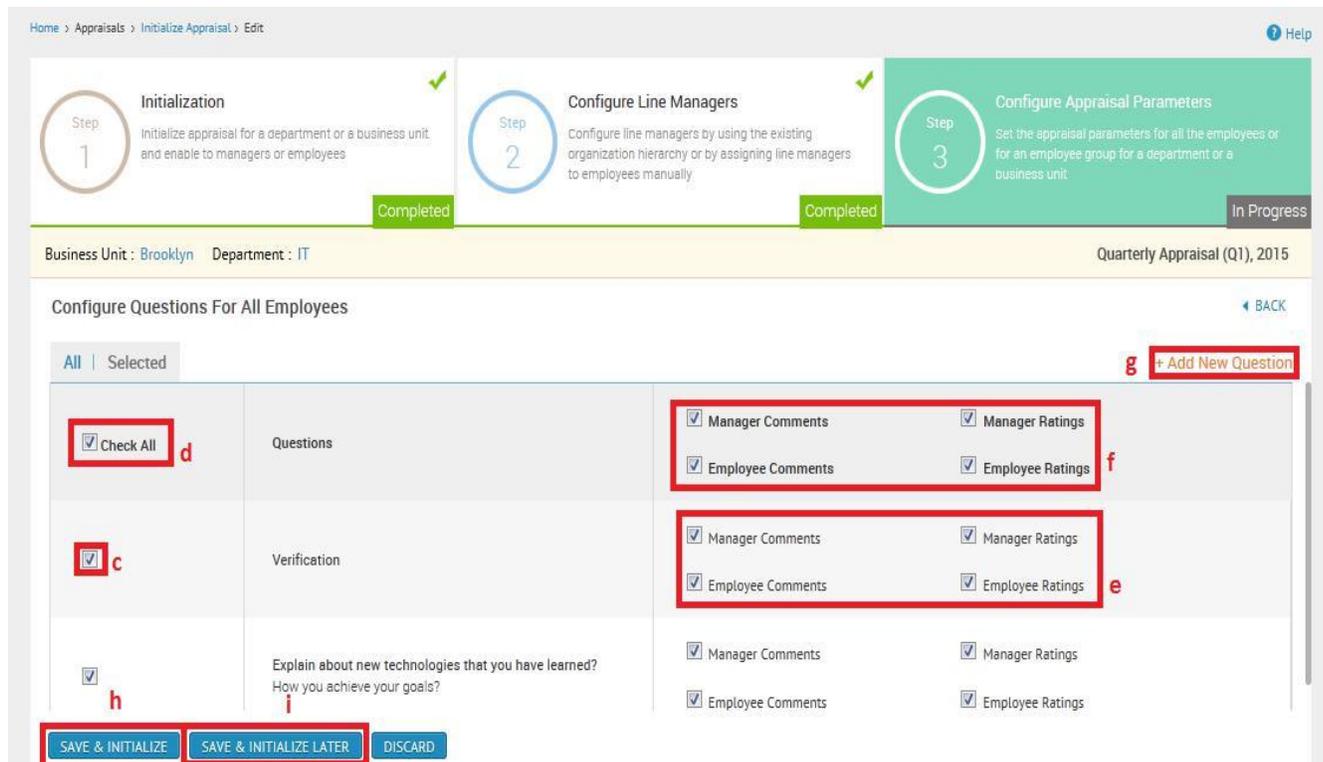


Figure 18

- c. Select Questions individually by checking the checkbox respective to each question
Or
- d. Select all the questions by checking the **Check All** option in the table header
- e. Enable Manager/Employee Comments or Manager/Employee Ratings for a specific question. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
Or
- f. Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- g. Click **+Add New Question** option to add more questions to the appraisal process
- h. Click **SAVE & INITIALIZE** button to initialize the appraisal
Or
- i. Click **SAVE & INITIALIZE LATER** button to only save the appraisal details

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

Please refer Figure 19

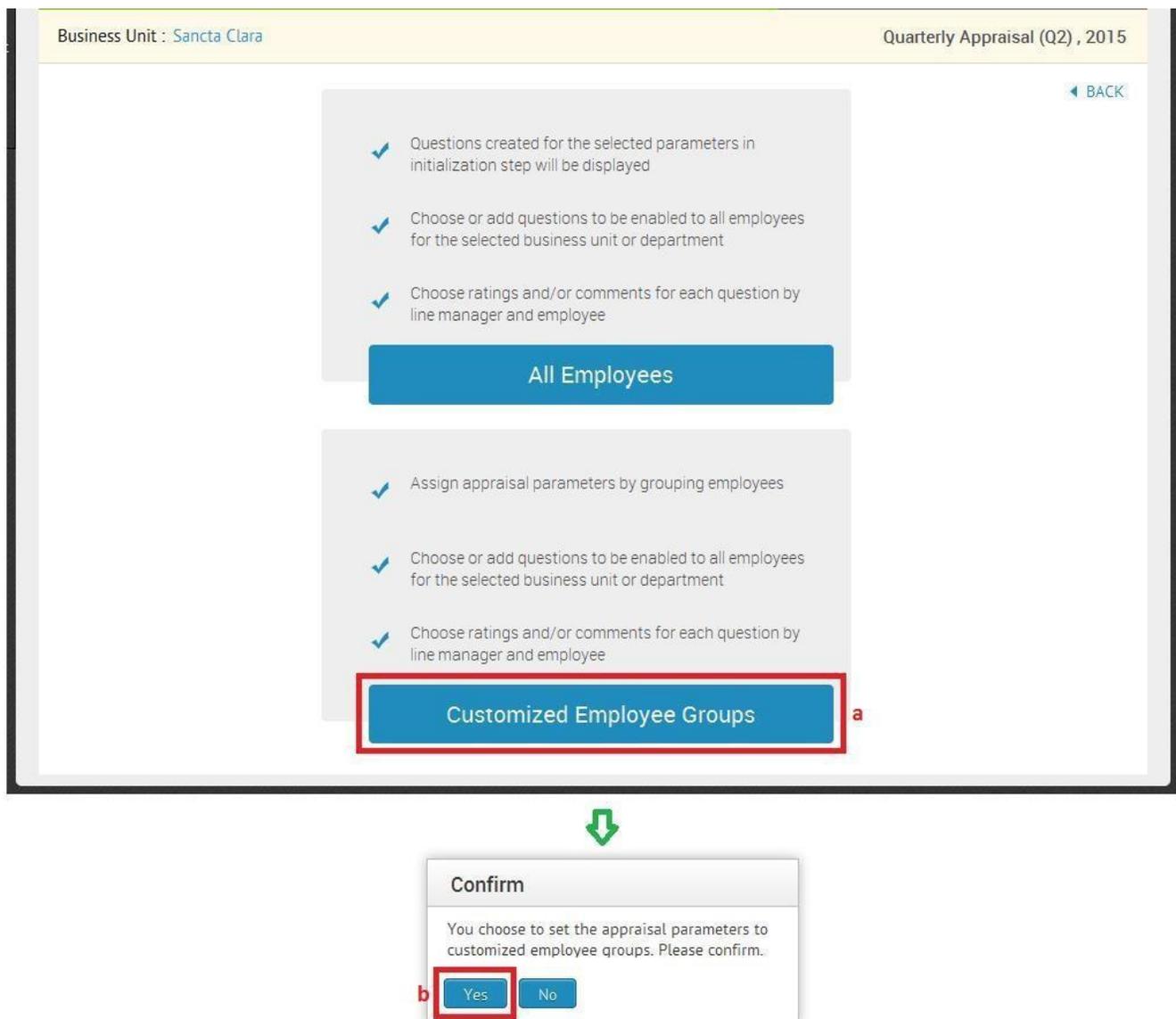


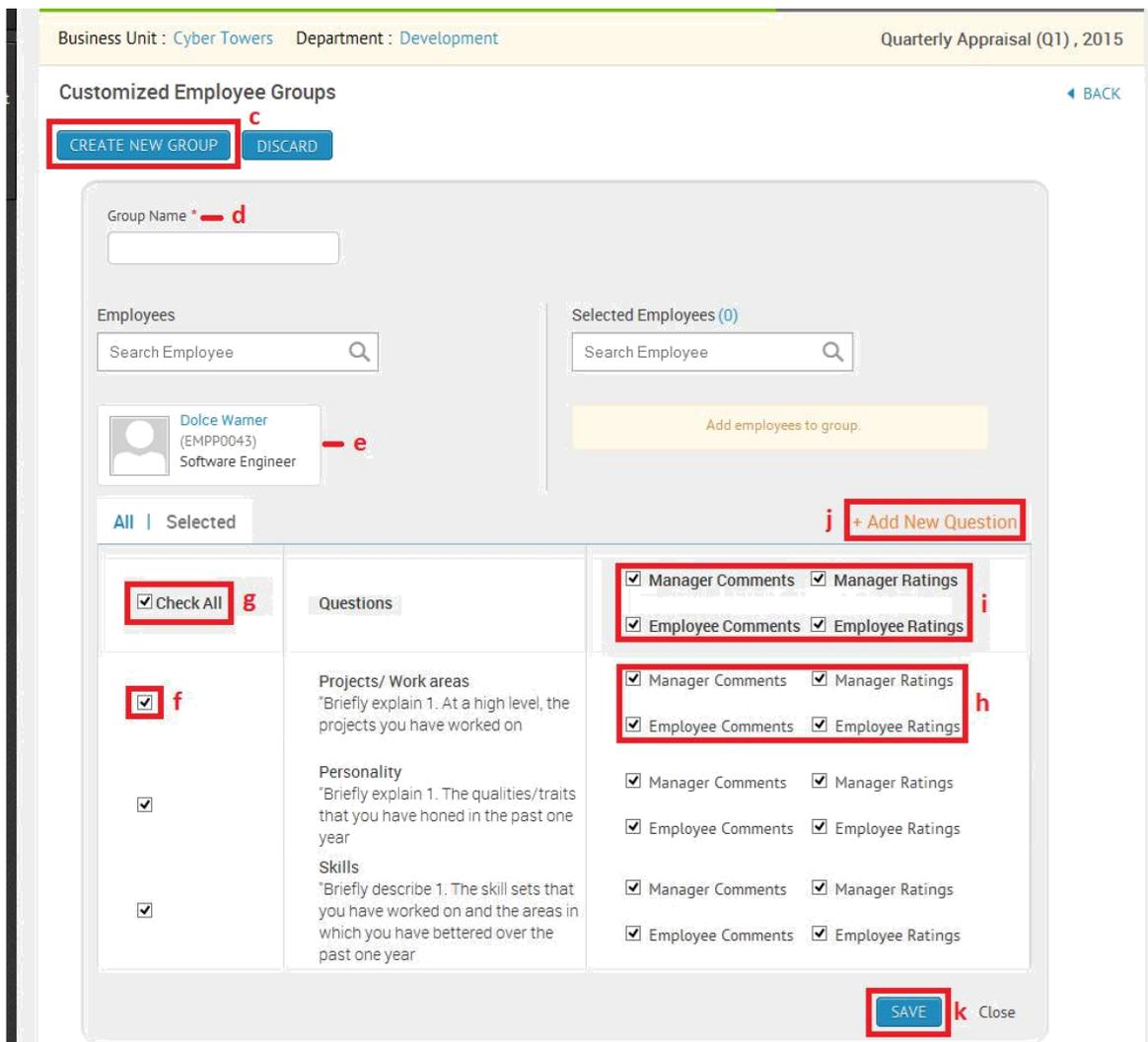
Figure 19

a. Click **Customized Employee Groups**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 20



Business Unit : Cyber Towers Department : Development Quarterly Appraisal (Q1) , 2015

Customized Employee Groups ← BACK

CREATE NEW GROUP **DISCARD** c

Group Name * d

Employees Selected Employees (0)

Search Employee Search Employee

 e

All | Selected j **+ Add New Question**

<input checked="" type="checkbox"/> Check All g	Questions	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings i
<input checked="" type="checkbox"/> f	Projects/ Work areas *Briefly explain 1. At a high level, the projects you have worked on	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings h
<input checked="" type="checkbox"/>	Personality *Briefly explain 1. The qualities/traits that you have honed in the past one year	<input type="checkbox"/> Manager Comments <input type="checkbox"/> Manager Ratings <input type="checkbox"/> Employee Comments <input type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/>	Skills *Briefly describe 1. The skill sets that you have worked on and the areas in which you have bettered over the past one year.	<input type="checkbox"/> Manager Comments <input type="checkbox"/> Manager Ratings <input type="checkbox"/> Employee Comments <input type="checkbox"/> Employee Ratings

SAVE k Close

Figure 20

- c. Click **CREATE NEW GROUP** button
- d. Enter group name
- e. Select Employees applicable for the appraisal process
- f. Select questions individually

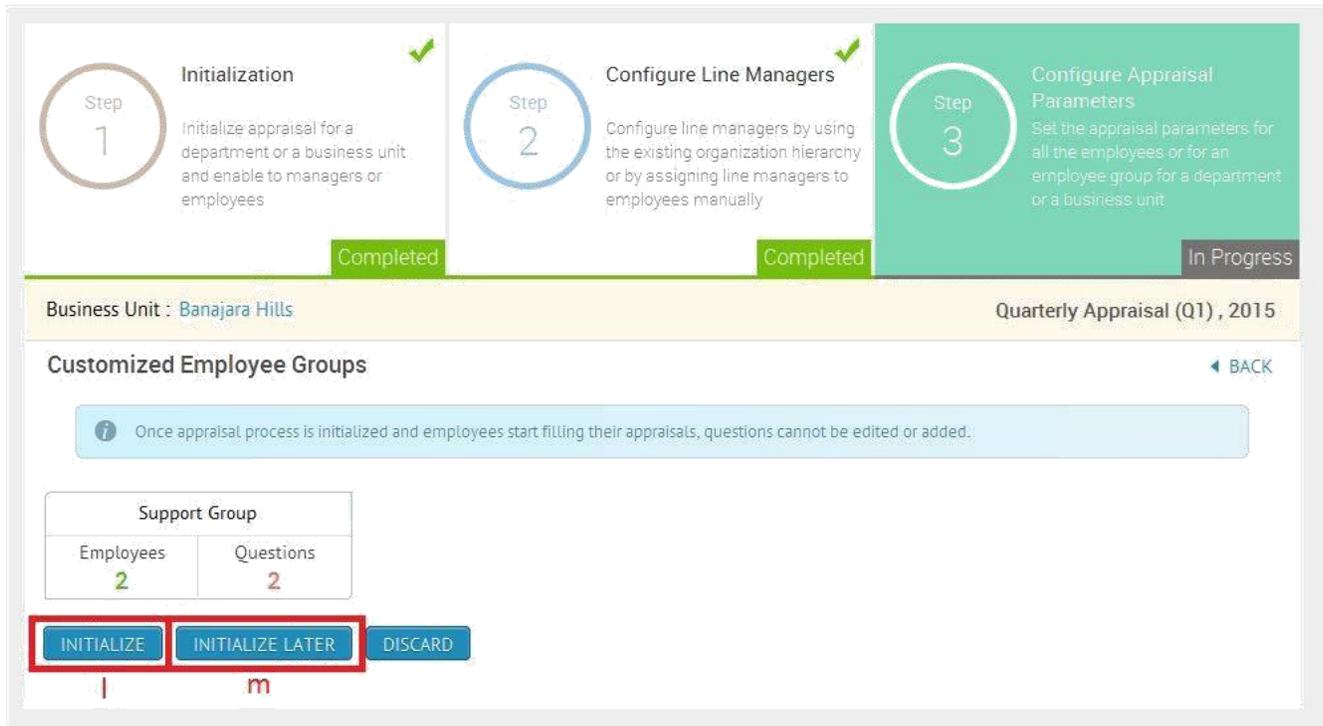
Or

- g. Select all the questions by selecting **Check All**
- h. Enable Manager/Employee Comments or Manager/Employee Ratings for a specific question. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.

Or

- i. Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- j. Click **+Add New Question** option to add more questions to the appraisal process
- k. Click **SAVE** button

Please refer Figure 21



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

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

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

Business Unit : **Banajara Hills** Quarterly Appraisal (Q1) , 2015

Customized Employee Groups ◀ BACK

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

Support Group	
Employees	Questions
2	2

INITIALIZE **INITIALIZE LATER** DISCARD

l m



Confirm

- Line Manager(s) cannot be edited after initialization.
Appraisal will be initialized. Do you wish to continue?

Yes **No**

n

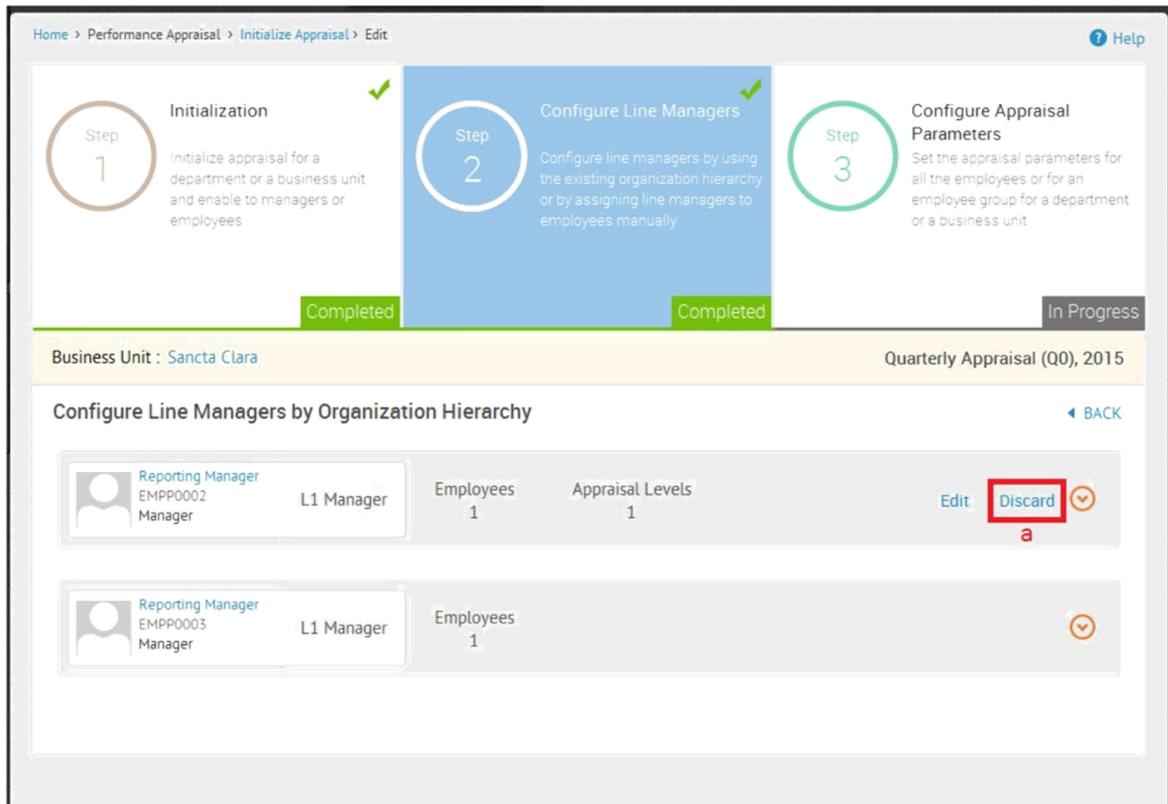
Figure 21

- l. Upon saving the appraisal parameters, click **INITIALIZE** button to initialize the appraisal process
- m. Click **INITIALIZE LATER** button to only save the appraisal process
- n. Click **Yes** button in the confirmation box to initialize the appraisal

How do I undo/discard Line Manager Configuration?

You can discard the Line Managers' configuration after saving the appraisal process in **Step 2**.

Please refer Figure 22



OR

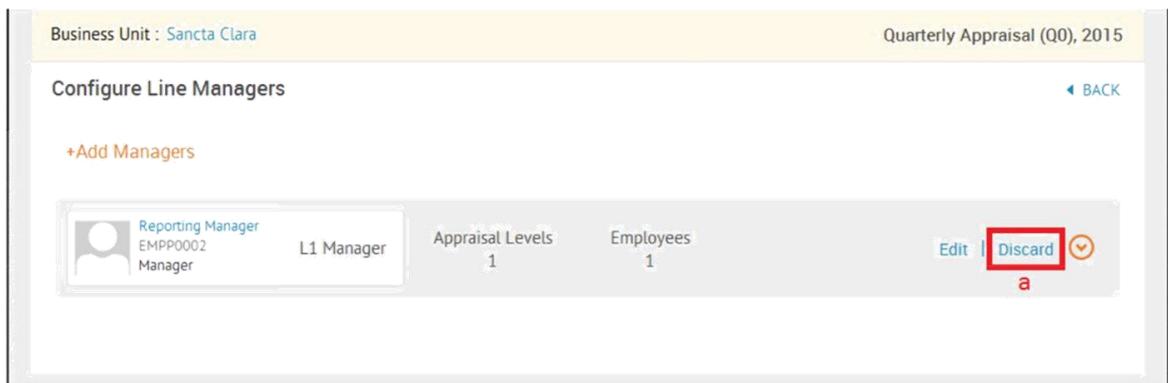


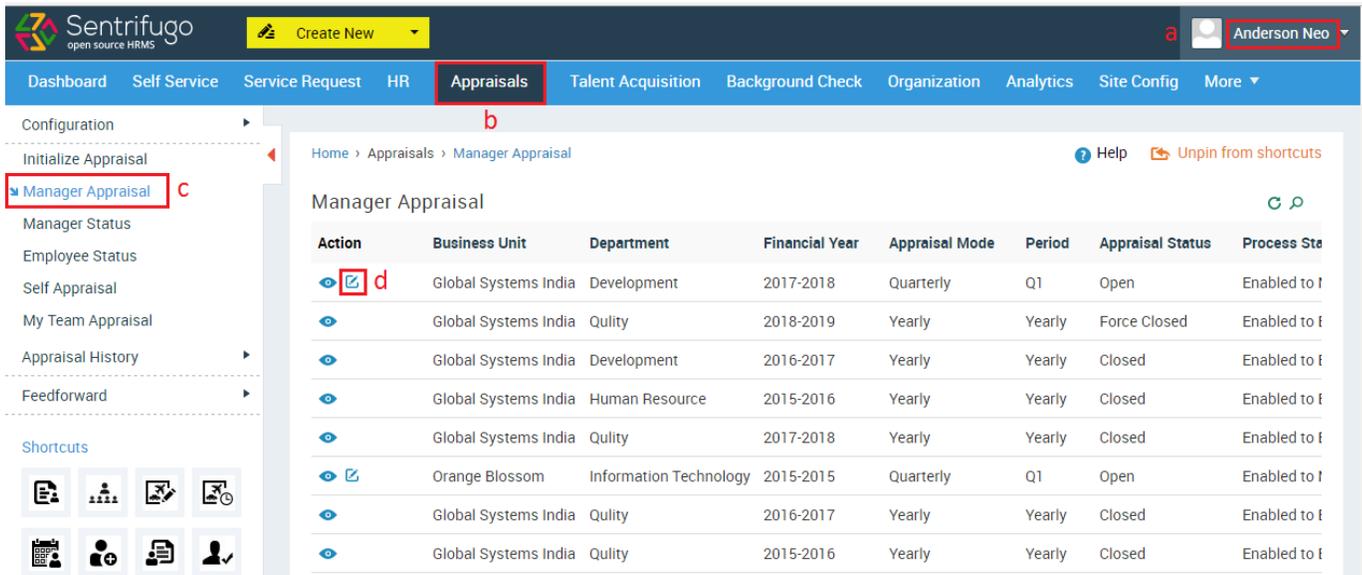
Figure 22

- a. Click **Discard** option to remove the Line Manager configurations

How do I set additional appraisal questions as a Manager?

In the first step of Initialize appraisal, if the appraisal is enabled to the Managers, then Managers can set questions in addition to the ones initially added by the HR/Management. Once the parameters are set, Managers can create Employee groups and apply the appraisal parameters to the group.

Please refer Figure 23



Home > Appraisals > Manager Appraisal

Manager Appraisal

Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Sta
 d	Global Systems India	Development	2017-2018	Quarterly	Q1	Open	Enabled to f
	Global Systems India	Quality	2018-2019	Yearly	Yearly	Force Closed	Enabled to f
	Global Systems India	Development	2016-2017	Yearly	Yearly	Closed	Enabled to f
	Global Systems India	Human Resource	2015-2016	Yearly	Yearly	Closed	Enabled to f
	Global Systems India	Quality	2017-2018	Yearly	Yearly	Closed	Enabled to f
	Orange Blossom	Information Technology	2015-2015	Quarterly	Q1	Open	Enabled to f
	Global Systems India	Quality	2016-2017	Yearly	Yearly	Closed	Enabled to f
	Global Systems India	Quality	2015-2016	Yearly	Yearly	Closed	Enabled to f

Figure 23

- a. Login as a Manager
- b. Click **Appraisals** in the top menu
- c. Click **Manager Appraisal** on the left menu panel
- d. Click **Edit** icon against an appraisal process

Please refer Figure 24

Initialization Details ◀ BACK

Business Unit	Jublee Hills	Department	--
Appraisal Mode	Half yearly	From Year	2014
To Year	2015	Period	H1
Status	Open	Eligibility	Full Time,Permanent,Probationary
Enable To	Managers	Parameters	Generic
Managers Due Date	05/27/15	Process Status	Enabled to Managers
Appraisal Ratings	1-5		

Group Details

Group Name * e

Employees

Search Employee:


 Employee 1
 (EMPP0029)
 Software Engineer f

Selected Employees (0)

Search Employee:


 Employee 8
 (EMPP0029)
 Software Engineer

Configure Appraisal Parameters for All Employees

All | Selected + Add New Question g

	Questions	
<input checked="" type="checkbox"/> i	Questions	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings k <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings
<input checked="" type="checkbox"/> h	New Technologies/skills learn and implemented What are the new technologies/skills you explored and implemented?	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings j
<input checked="" type="checkbox"/>	Responsibility Have you taken complete ownership of the task/project/product assigned to you?	<input checked="" type="checkbox"/> Manager Comments <input checked="" type="checkbox"/> Manager Ratings <input checked="" type="checkbox"/> Employee Comments <input checked="" type="checkbox"/> Employee Ratings

| Close Close

Figure 24

- e. Create new group (E.g., Support, Testing, Development, etc.)
- f. Add Employees to the group by clicking on an Employee
- g. Click **Add New Question** option to add questions for a particular group of Employees
- h. Select Questions individually

Or

- i. Select all the questions by selecting **Check All**
- j. Enable Manager/Employee Comments or Manager/Employee Ratings for a specific question. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.

Or

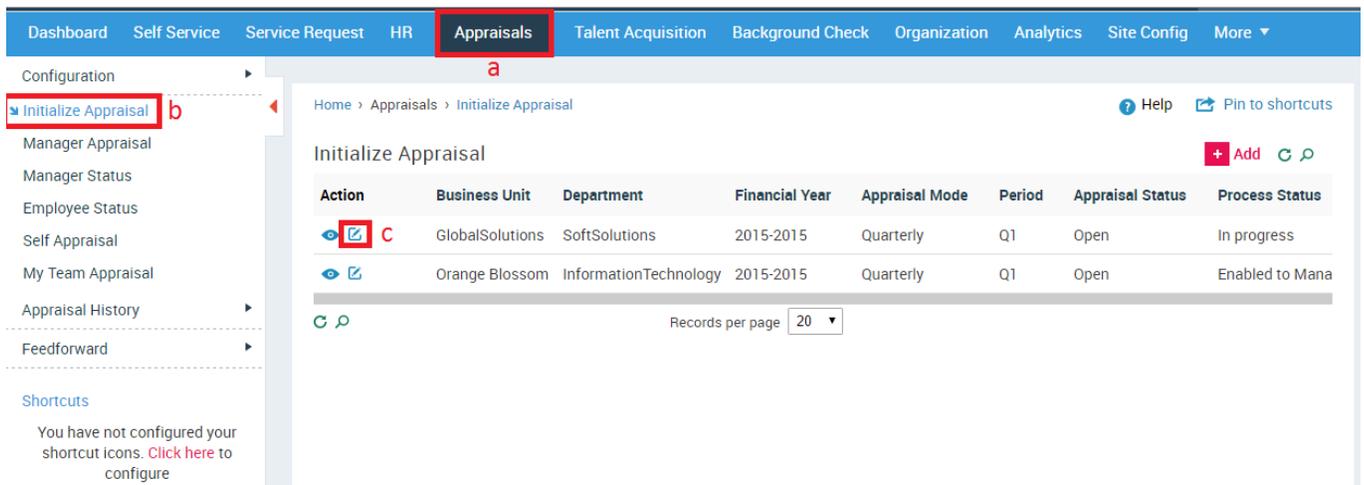
- k. Select Enable Manager/Employee Comments or Manager/Employee Ratings for all questions. Enabling any option will allow Manager/Employee to provide Ratings and/or Comments.
- l. Click **SAVE** button

Upon saving appraisal details, the Manager must **SUBMIT** the appraisal process for initialization.

How do I enable the appraisal to Employees?

You can update the appraisal process by changing the process status from “Enable to Managers” to “Enable to Employees” and providing Employee Due Date.

Please refer Figure 25



The screenshot displays the Sentrifugo HRMS interface. At the top, a navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals' (highlighted with a red box and labeled 'a'), 'Talent Acquisition', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. A left sidebar contains a 'Configuration' menu with 'Initialize Appraisal' (highlighted with a red box and labeled 'b'), 'Manager Appraisal', 'Manager Status', 'Employee Status', 'Self Appraisal', 'My Team Appraisal', 'Appraisal History', and 'Feedforward'. The main content area is titled 'Initialize Appraisal' and features a table with the following data:

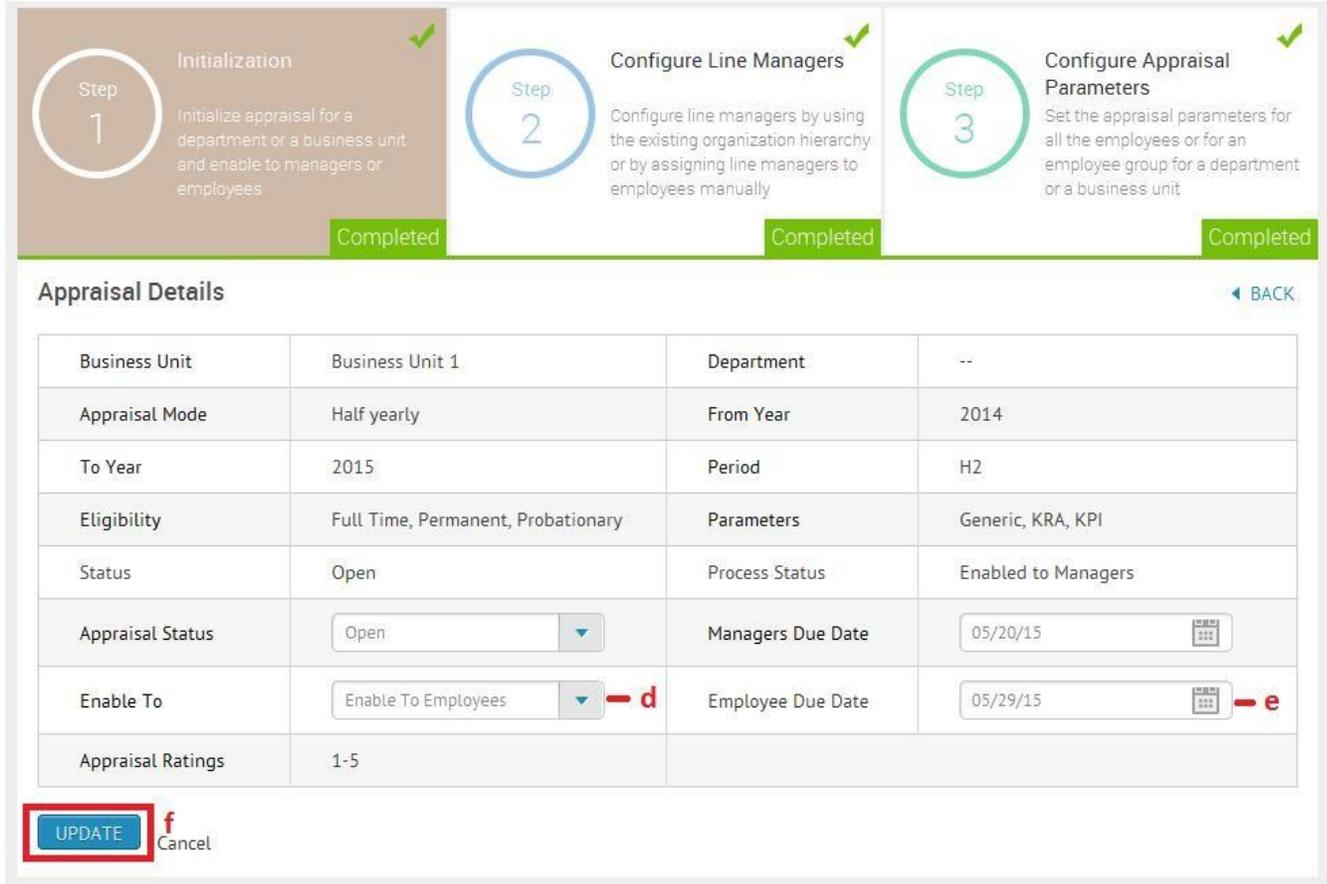
Action	Business Unit	Department	Financial Year	Appraisal Mode	Period	Appraisal Status	Process Status
C	GlobalSolutions	SoftSolutions	2015-2015	Quarterly	Q1	Open	In progress
	Orange Blossom	InformationTechnology	2015-2015	Quarterly	Q1	Open	Enabled to Mana

At the bottom of the table, there is a 'Records per page' dropdown menu set to 20.

Figure 25

- a. Click **Appraisals** in the top menu
- b. Click **Initialize Appraisal** on the left menu panel
- c. Click **Edit** icon against an appraisal process

Please refer Figure 26



The screenshot shows a three-step process flow for configuring appraisals. All steps are marked as 'Completed' with green checkmarks:

- Step 1: Initialization** - Initialize appraisal for a department or a business unit and enable to managers or employees.
- Step 2: Configure Line Managers** - Configure line managers by using the existing organization hierarchy or by assigning line managers to employees manually.
- 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.

Below the steps is the **Appraisal Details** section, which includes a table of configuration parameters and an **UPDATE** button (highlighted with a red box).

Business Unit	Business Unit 1	Department	--
Appraisal Mode	Half yearly	From Year	2014
To Year	2015	Period	H2
Eligibility	Full Time, Permanent, Probationary	Parameters	Generic, KRA, KPI
Status	Open	Process Status	Enabled to Managers
Appraisal Status	Open	Managers Due Date	05/20/15
Enable To	Enable To Employees - d	Employee Due Date	05/29/15 - e
Appraisal Ratings	1-5		

At the bottom left, there is a blue **UPDATE** button and a **Cancel** button.

Figure 26

- d. Select **'Enable to Employees'** in the Enable To dropdown
- e. Select a date as the Employee Due Date
- f. Click **UPDATE** button to enable the appraisal process to Employees

How do I view a Manager's Status?

You (Management/HR) can view the Manager's appraisal status.

Please refer Figure 27

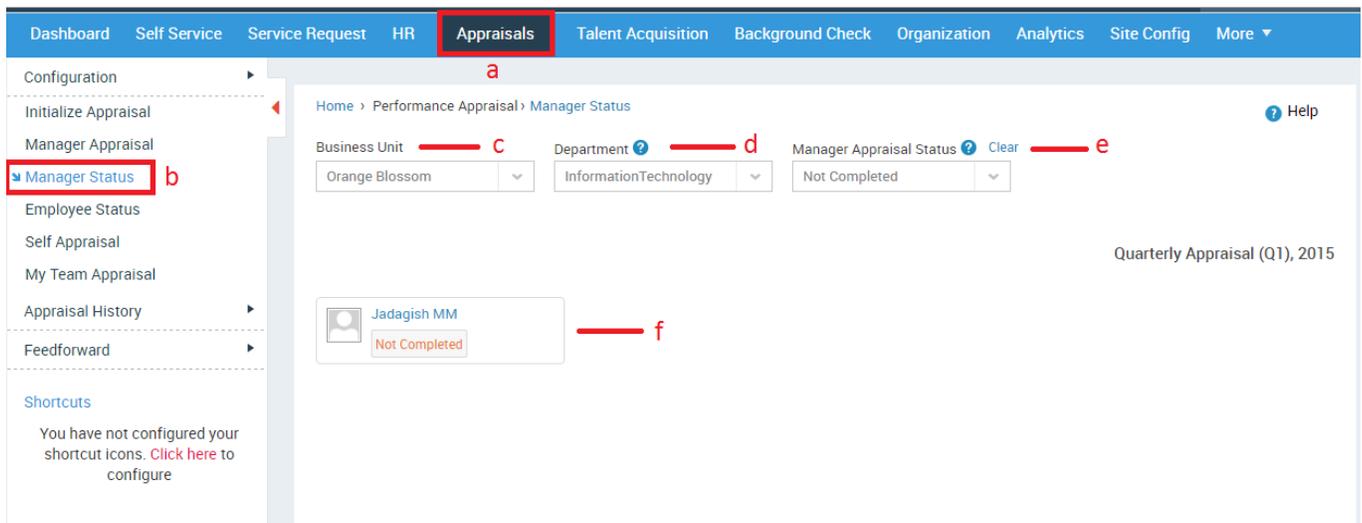


Figure 27

- a. Click **Appraisals** in the top menu
- b. Click **Manager Status** on the left menu panel
- c. Select the Business Unit
- d. Select the Department
- e. Select the Manager Appraisal Status if required
- f. Managers and their status will be displayed

How do I provide Self Appraisal?

You can provide self-appraisal details such as ratings and comments. Upon completion of self-appraisal, your appraisal details will be visible to your line Managers for further ratings and comments.

Please refer Figure 28

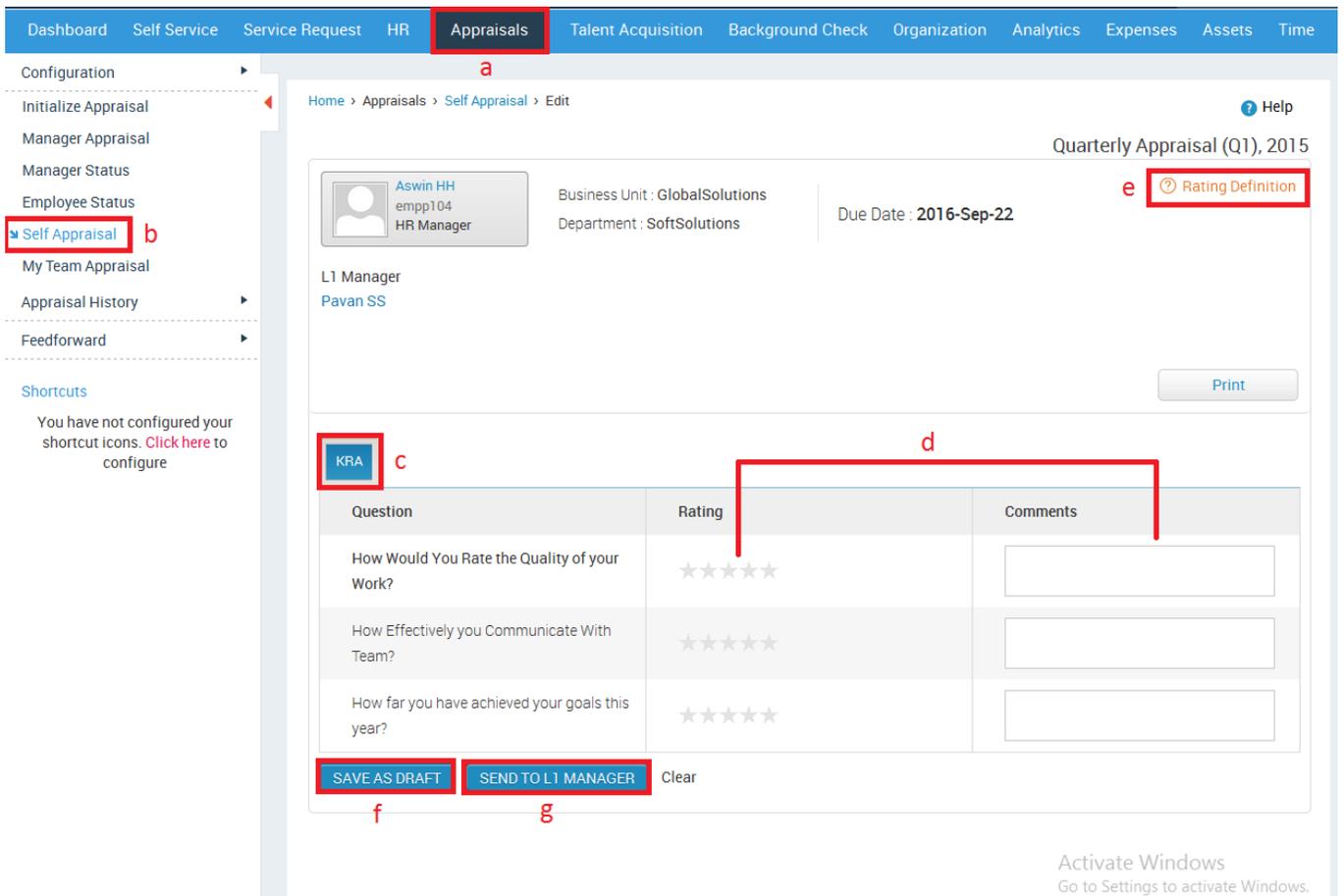


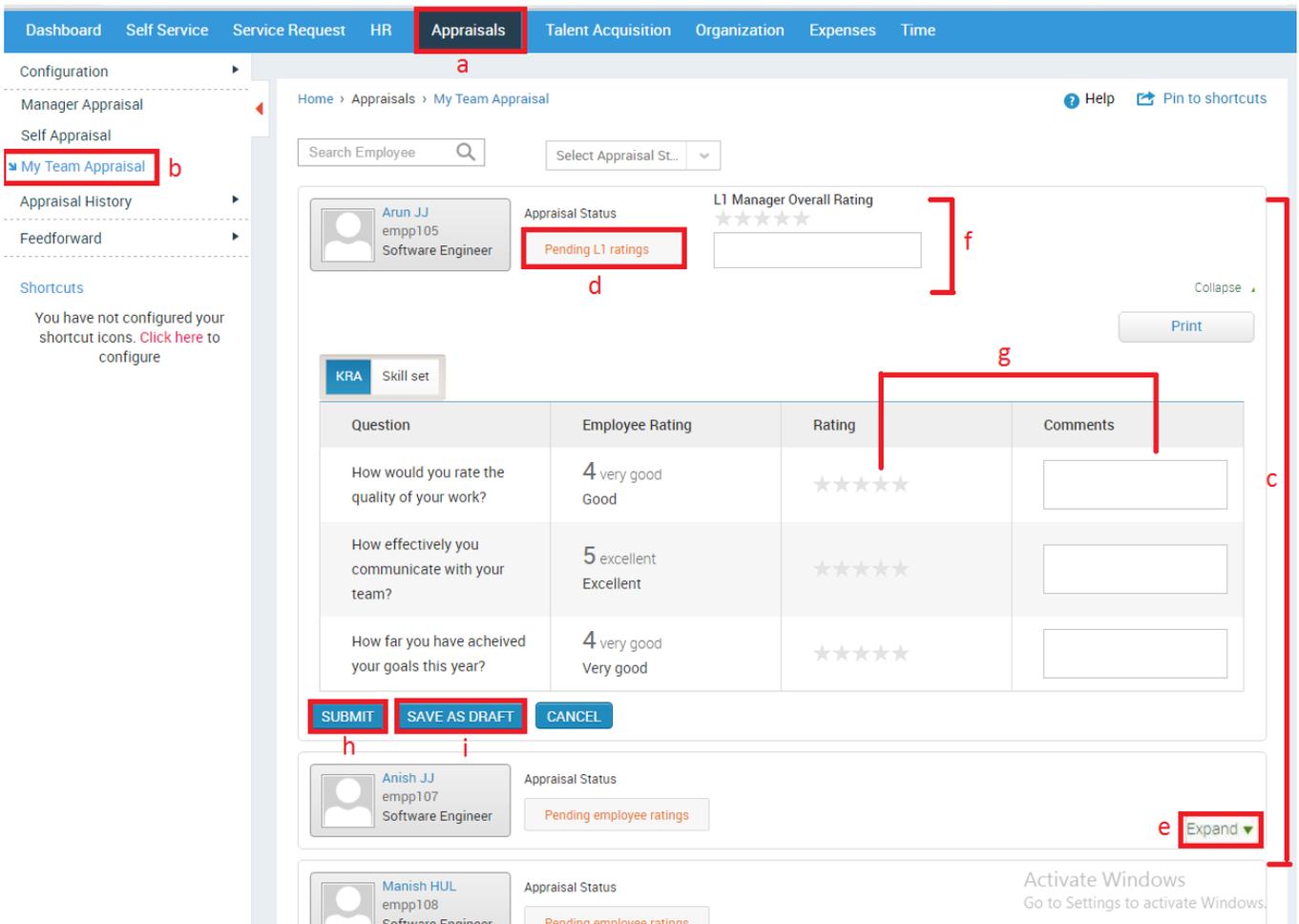
Figure 28

- a. Click **Appraisals** in the top menu
- b. Click **Self Appraisal** on the left menu panel
- c. The parameters are displayed above the questions grid
- d. Provide rating and comments for every question
- e. Click **Rating Definition** option to view the text for each rating
- f. Click **SEND TO L1 MANAGER** button to send the self-appraisal details it to L1 Manager
- g. Click **SAVE AS DRAFT** button to only save the appraisal process

How do I provide appraisal ratings and comments for an Employee?

You (L1 Manager) will be able to view your team Employees' appraisal status. Once the Employees complete their appraisal process, you 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.

Please refer Figure 29



Dashboard Self Service Service Request HR **Appraisals** Talent Acquisition Organization Expenses Time

Configuration
 Manager Appraisal
 Self Appraisal
My Team Appraisal b
 Appraisal History
 Feedforward

Shortcuts
 You have not configured your shortcut icons. [Click here](#) to configure

Home > Appraisals > My Team Appraisal Help Pin to shortcuts

Search Employee Select Appraisal St...

Arun JJ
 empp105
 Software Engineer
 Appraisal Status: Pending L1 ratings d
 L1 Manager Overall Rating: ★★★★★ f

Print

KRA Skill set

Question	Employee Rating	Rating	Comments
How would you rate the quality of your work?	4 very good Good	★★★★★	
How effectively you communicate with your team?	5 excellent Excellent	★★★★★	
How far you have achieved your goals this year?	4 very good Very good	★★★★★	

SUBMIT h SAVE AS DRAFT i CANCEL

Anish JJ
 empp107
 Software Engineer
 Appraisal Status: Pending employee ratings
 Expand e

Manish HUL
 empp108
 Software Engineer
 Appraisal Status: Pending employee ratings

Activate Windows
 Go to Settings to activate Windows.

Figure 29

- Click **Appraisals** in the top menu
- Click **My Team Appraisal** on the left menu panel
- All the Employees in the Manager's team will be displayed
- The status of each Employee's appraisal is displayed
- Click **Expand** option to provide Manager's rating
- Provide overall rating and comment for an Employee
- Provide the rating and comments for each question
- Click **SUBMIT** button
- Click **SAVE AS DRAFT** button to save the ratings and comments without submitting. This option will allow you to make changes to your ratings and comments later.

How do I check Employee Status?

You (Management/HR) can view the Employees' appraisal status.

Please refer Figure 30

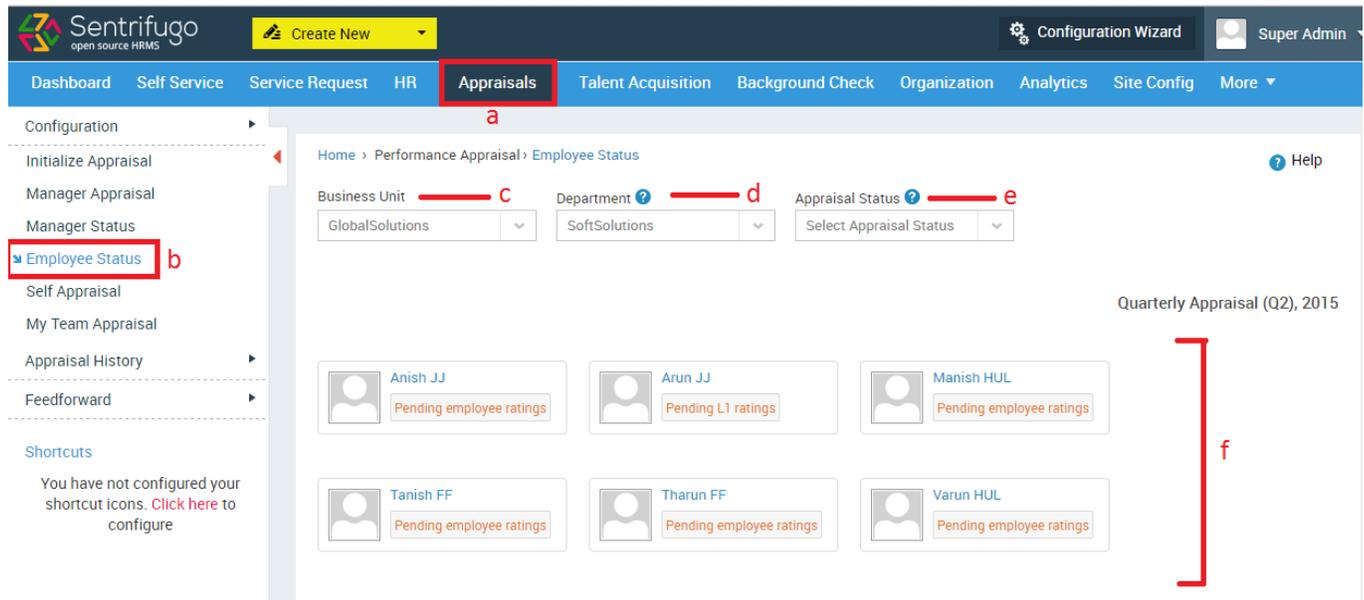


Figure 30

- a. Click **Appraisals** in the top menu
- b. Click **Employee Status** on the left menu panel
- c. Select the Business Unit
- d. Select the Department
- e. Select Appraisal Status if required
- f. Employees and their appraisal statuses will be displayed

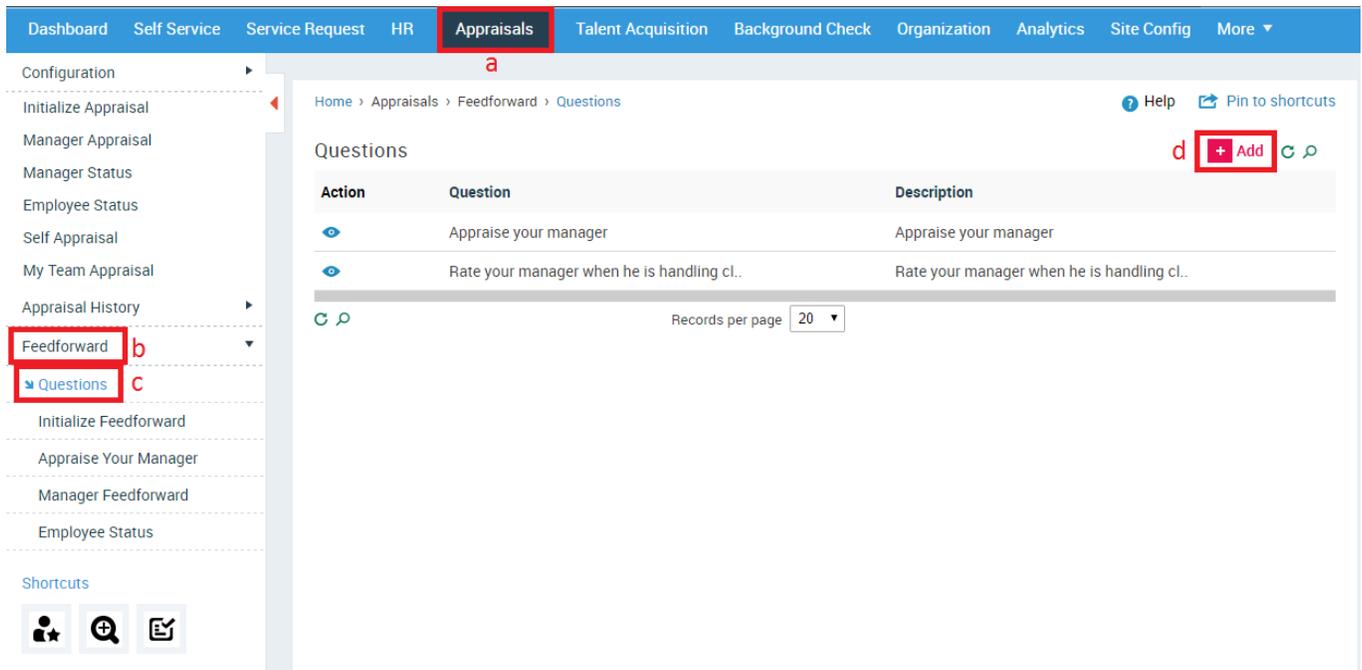
What is Feedforward?

Feedforward is the feedback given by the Employees to appraise their respective Line Managers. All the configurations are done on the Management level. Only the Management can view the feedback given by the Employees about their Managers.

How do I add Questions for Feedforward?

Questions are added by the Management to evaluate Managers' performance.

Please refer Figure 31



Home > Appraisals > Feedforward > Questions

Help Pin to shortcuts

Questions + Add

Action	Question	Description
	Appraise your manager	Appraise your manager
	Rate your manager when he is handling cl..	Rate your manager when he is handling cl..

Records per page 20

Figure 31

- a. Click **Appraisals** in the top menu
- b. Click **Feedforward** on the left menu panel
- c. Click **Questions** in the submenu
- d. Click **+Add** button

Please refer Figure 32

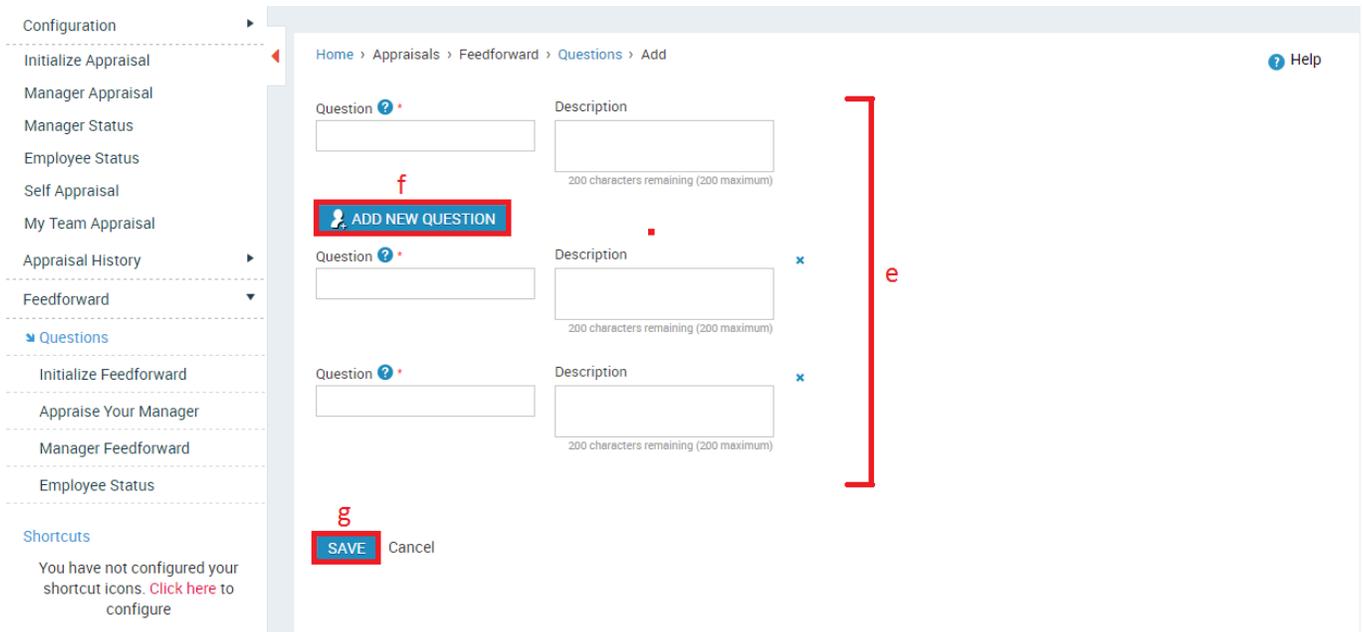


Figure 32

- e. Add the question and description if required
- f. Click **ADD NEW QUESTION** button to add more questions
- g. Click **SAVE** button

How do I initialize Feedforward?

- In the initialize feed forward page, only the appraisals which have 'Closed' status are displayed.
- **Employee Details:** Here, the Management will determine if the management can view only the feedback given by the Employees or the feedback along with the Employee names.
 - **Show:** Employee names and their feedbacks will be displayed
 - **Hide:** Only the feedback information 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** option is also provided.

Please refer Figure 33

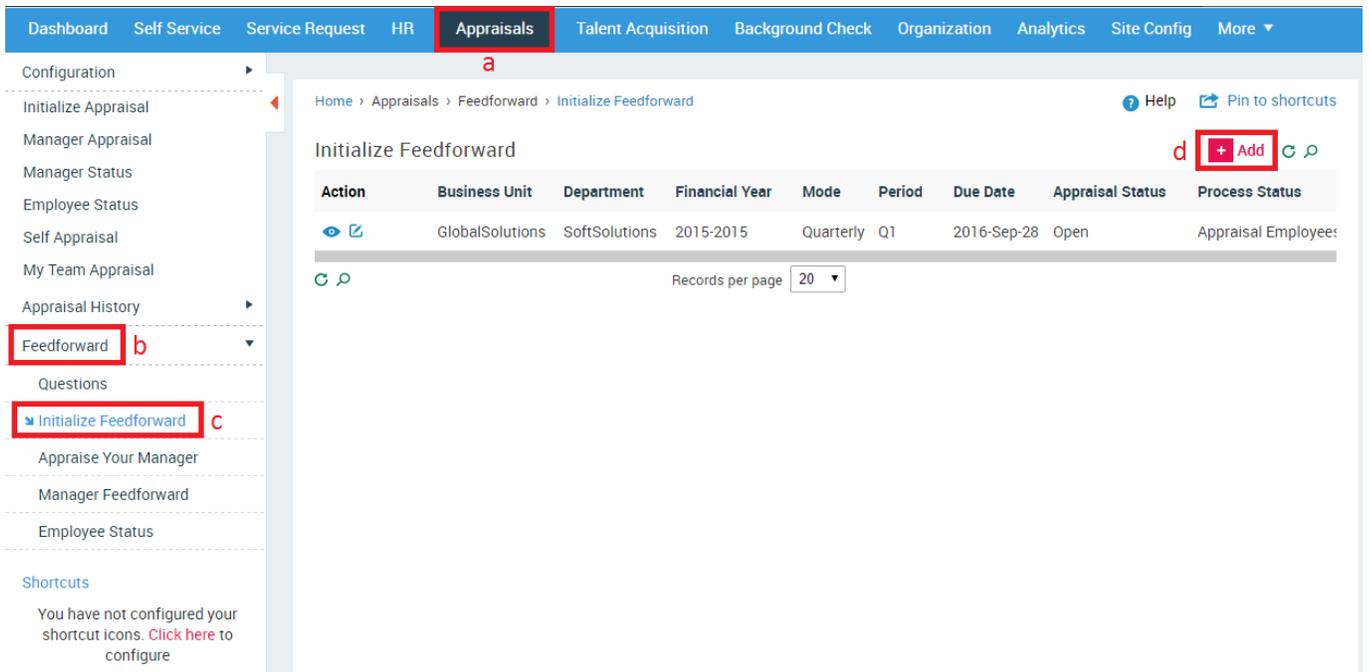


Figure 33

- a. Click **Appraisals** in the top menu
- b. Click **Feedforward** on the left menu panel
- c. Click **Initialize Feedforward** in the submenu
- d. Click **+Add** button

Please refer Figure 34

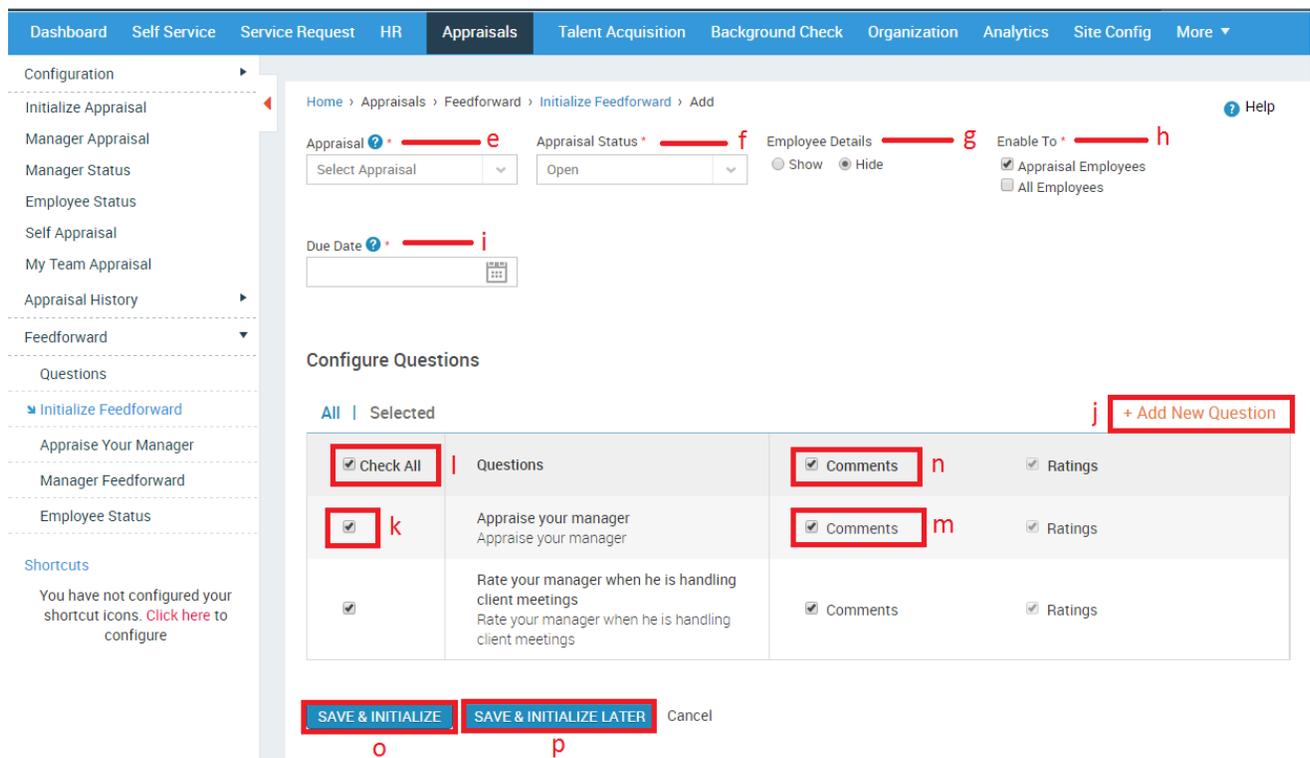


Figure 34

- e. Select an appraisal process from the Appraisal dropdown
- f. The Status will be to 'Open' by default
- g. Select whether you want to view the Employee details along with their feedback ratings and comments or have the Employee details hidden
- h. Enable Feedforward to all Employees or only to Employees who are eligible for Appraisal process
- i. Select a due date for Employees to provide their feedback
- j. Click **Add New Question** to add new questions for Feedforward
- k. Select Questions individually

Or

- l. Select all the questions
- m. Select comments individually for all the questions

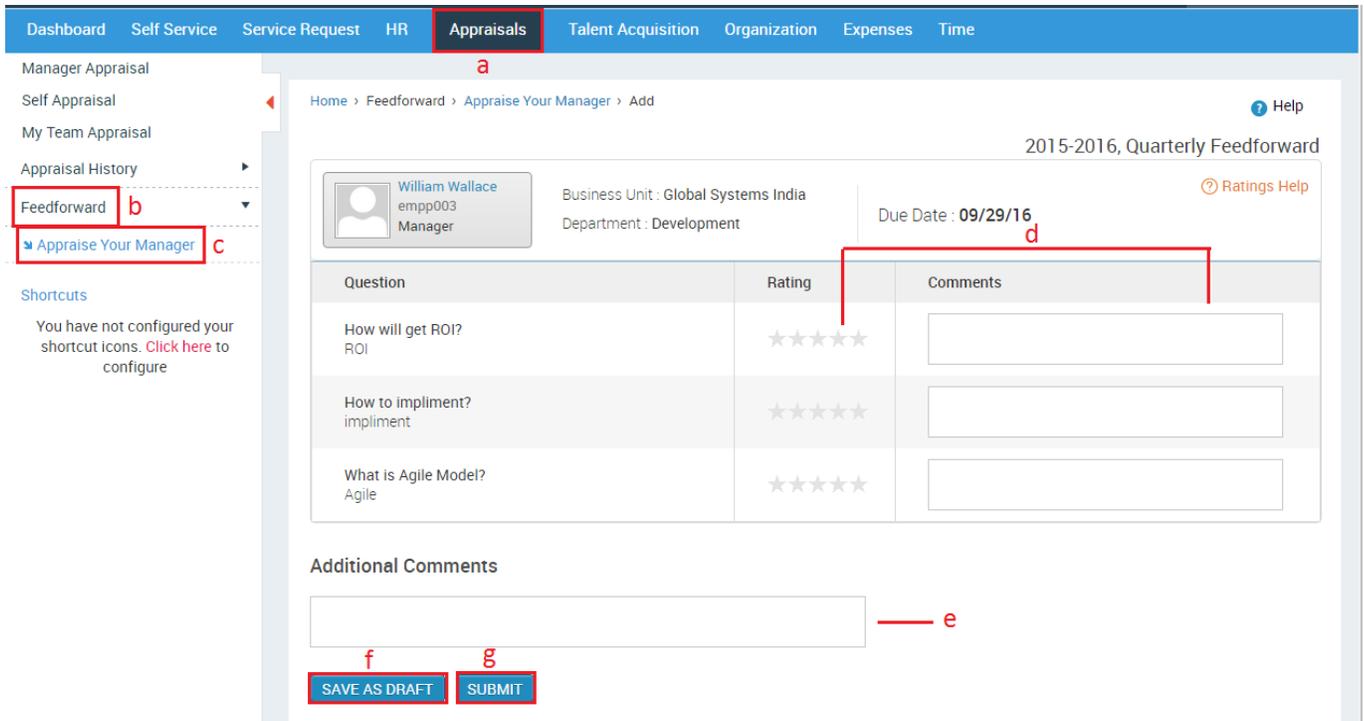
Or

- n. Select comments for all questions
- o. Click **SAVE & INITIALIZE** button to initialize the Feed Forward process
- p. Click on **SAVE & INITIALIZE LATER** button to only save the Feed Forward process

How do I Appraise my Manager?

You will be able to view the questions defined to appraise your Line Managers. You can provide ratings and comments for each question and submit the feedforward.

Please refer Figure 35



The screenshot shows the 'Appraisals' section of the Sentrifugo HRMS. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Talent Acquisition', 'Organization', 'Expenses', and 'Time'. The left sidebar menu has 'Manager Appraisal', 'Self Appraisal', 'My Team Appraisal', 'Appraisal History', 'Feedforward', and 'Appraise Your Manager'. The main content area displays the '2015-2016, Quarterly Feedforward' form for 'William Wallace' (emp003, Manager). The form includes a table with columns for 'Question', 'Rating', and 'Comments'. Below the table is an 'Additional Comments' section and two buttons: 'SAVE AS DRAFT' and 'SUBMIT'.

Question	Rating	Comments
How will get ROI? ROI	★★★★★	<input type="text"/>
How to impliment? impliment	★★★★★	<input type="text"/>
What is Agile Model? Agile	★★★★★	<input type="text"/>

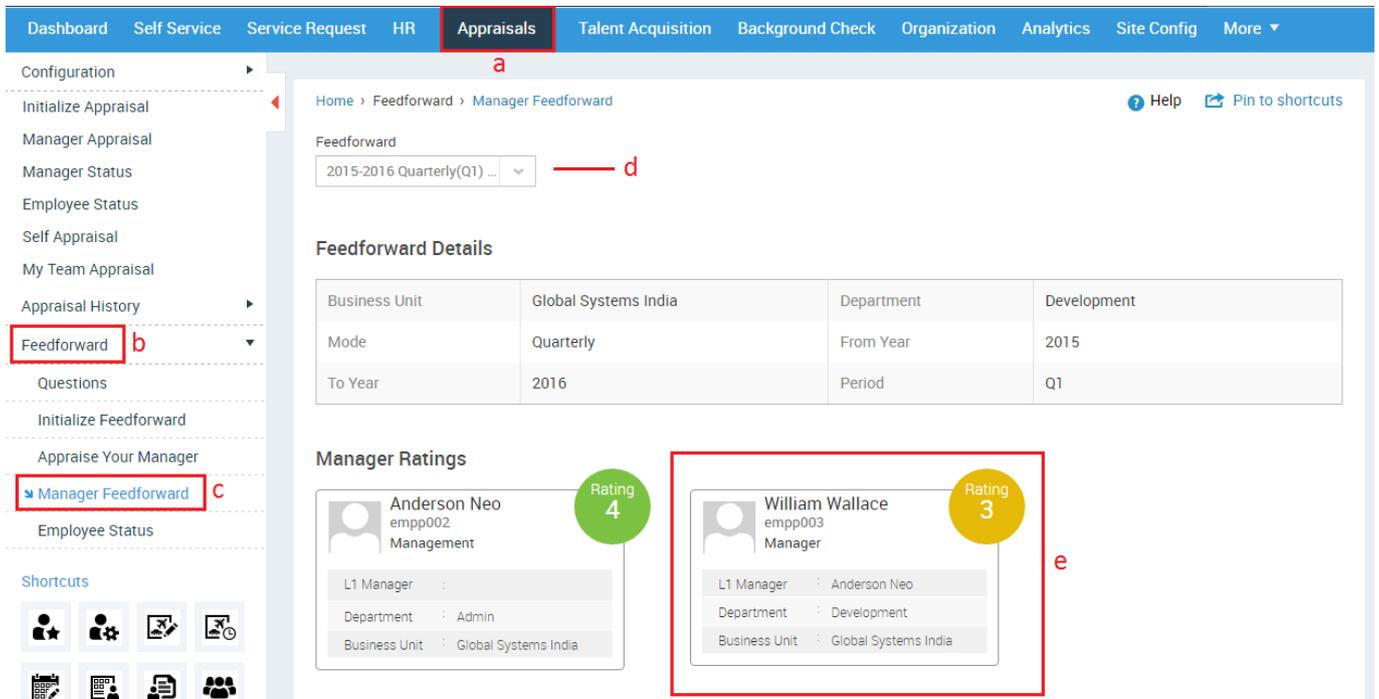
Figure 35

- a. Click **Appraisals** in the top menu
- b. Click **Feedforward** on the left menu panel
- c. Click **Appraise Your Manager** in the submenu
- d. Provide ratings and comments
- e. Enter additional comments (not mandatory)
- f. Click **SAVE AS DRAFT** button to make changes later
- g. Click **SUBMIT** button

How do I view Managers' Feedforward details?

You (Management) will be able to view Managers feedforward details. Upon selection of appraisal from the dropdown, feed forward details along with the Manager ratings are displayed. The average ratings of all the Employees will be highlighted. A detailed description of comments and ratings of Employees are displayed by question or by Employee.

Please refer Figure 36



The screenshot displays the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals' (highlighted with 'a'), 'Talent Acquisition', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar contains a menu with 'Configuration', 'Initialize Appraisal', 'Manager Appraisal', 'Manager Status', 'Employee Status', 'Self Appraisal', 'My Team Appraisal', 'Appraisal History', 'Feedforward' (highlighted with 'b'), 'Questions', 'Initialize Feedforward', 'Appraise Your Manager', 'Manager Feedforward' (highlighted with 'c'), and 'Employee Status'. The main content area shows the 'Feedforward' details for '2015-2016 Quarterly(Q1)' (highlighted with 'd'). Below this is a table with the following data:

Feedforward Details			
Business Unit	Global Systems India	Department	Development
Mode	Quarterly	From Year	2015
To Year	2016	Period	Q1

Below the table is the 'Manager Ratings' section, which includes two manager profiles:

- Anderson Neo** (empp002, Management) with a Rating of 4.
- William Wallace** (empp003, Manager) with a Rating of 3.

The 'Manager Ratings' section is highlighted with 'e'.

Figure 36

- Click **Appraisals** in the top menu
- Click **Feedforward** on the left menu panel
- Click **Manager Feedforward** in the submenu
- Select an appraisal process to view the Feedforward details
- Click on individual Manager section to view the ratings and comments provided by Employees

Please refer Figure 37

Manager Feedforward

x



Anderson Neo
empp002
Management

🔍

4.7

Advance

★★★★★

Department : Admin

Business Unit : Global Systems India

L1 Manager :

By Question

By Employee

Click on the Employee to view his/her comments



Johnty Rodhes
empp004
Manager

How will get ROI? ★★★★★

good

How to impliment? ★★★★★

Good

What is Agile Model? ★★★★★

Super

Figure 37

The below options will only be available if you have selected **'Show'** for the option **Employee Details** during feedforward initialization.

- f. Select 'By Questions' to view the ratings and comments based on questions
- g. Select 'By Employee' to view the ratings and comments of each Employee

How do I view Employee Feedforward Status?

You (Management) will be able to view the feed forward status of all Employees.

Please refer Figure 38

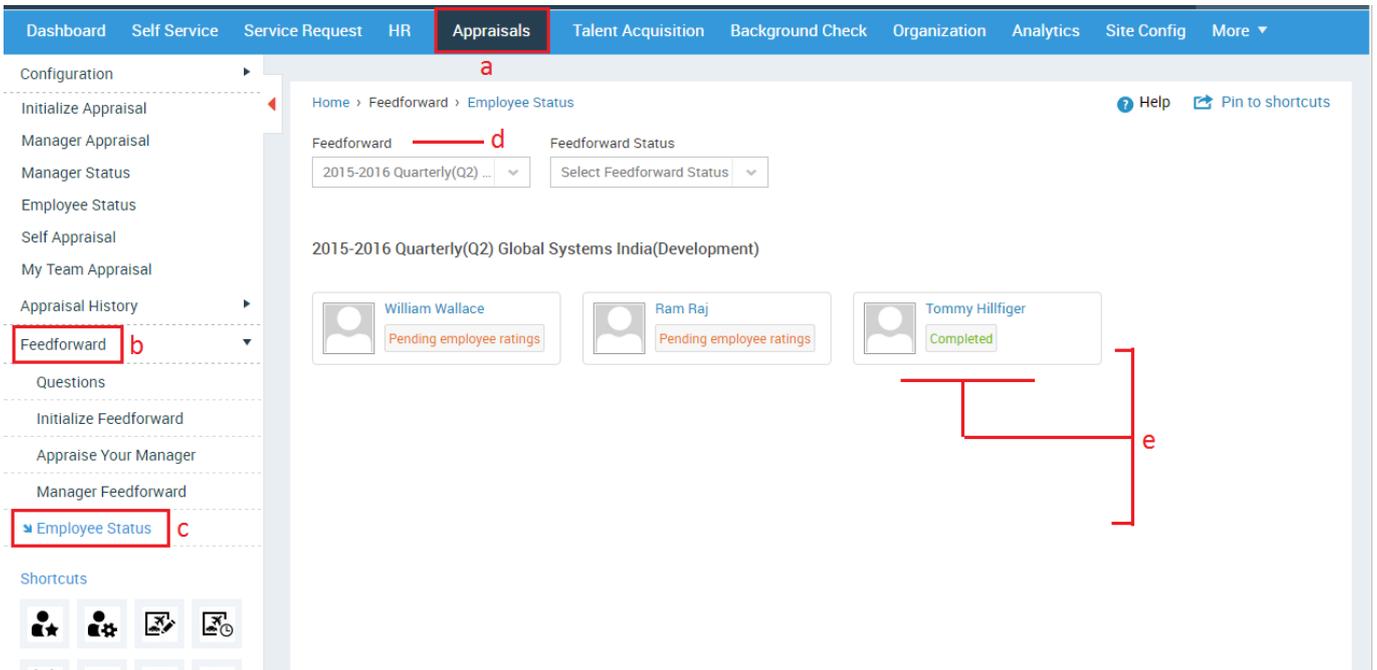


Figure 38

- Click **Appraisals** in the top menu
- Click **Feedforward** on the left menu panel
- Click **Employee Status** in the submenu
- Select a process to view Feedforward details in the dropdown
- The Employees of the selected process along with their Feed Forward status will be displayed

How do I view my Appraisal History?

Please refer Figure 39

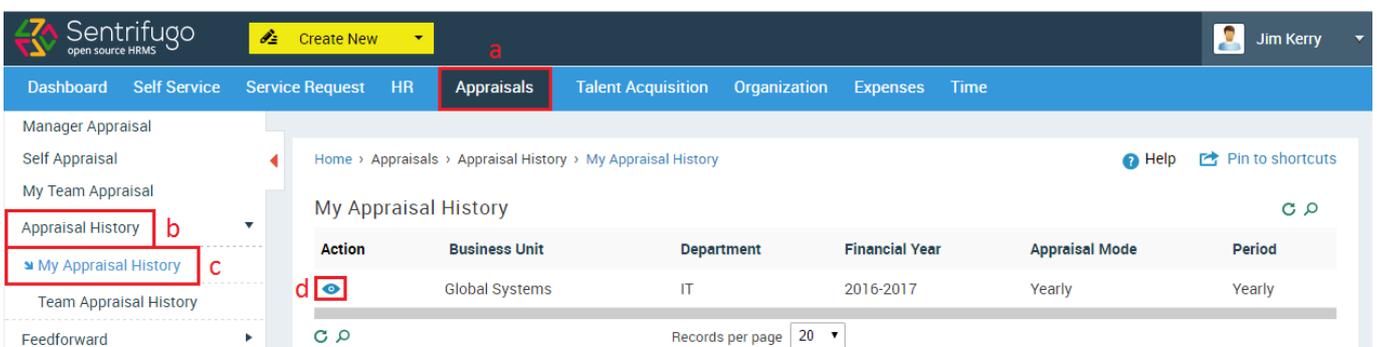
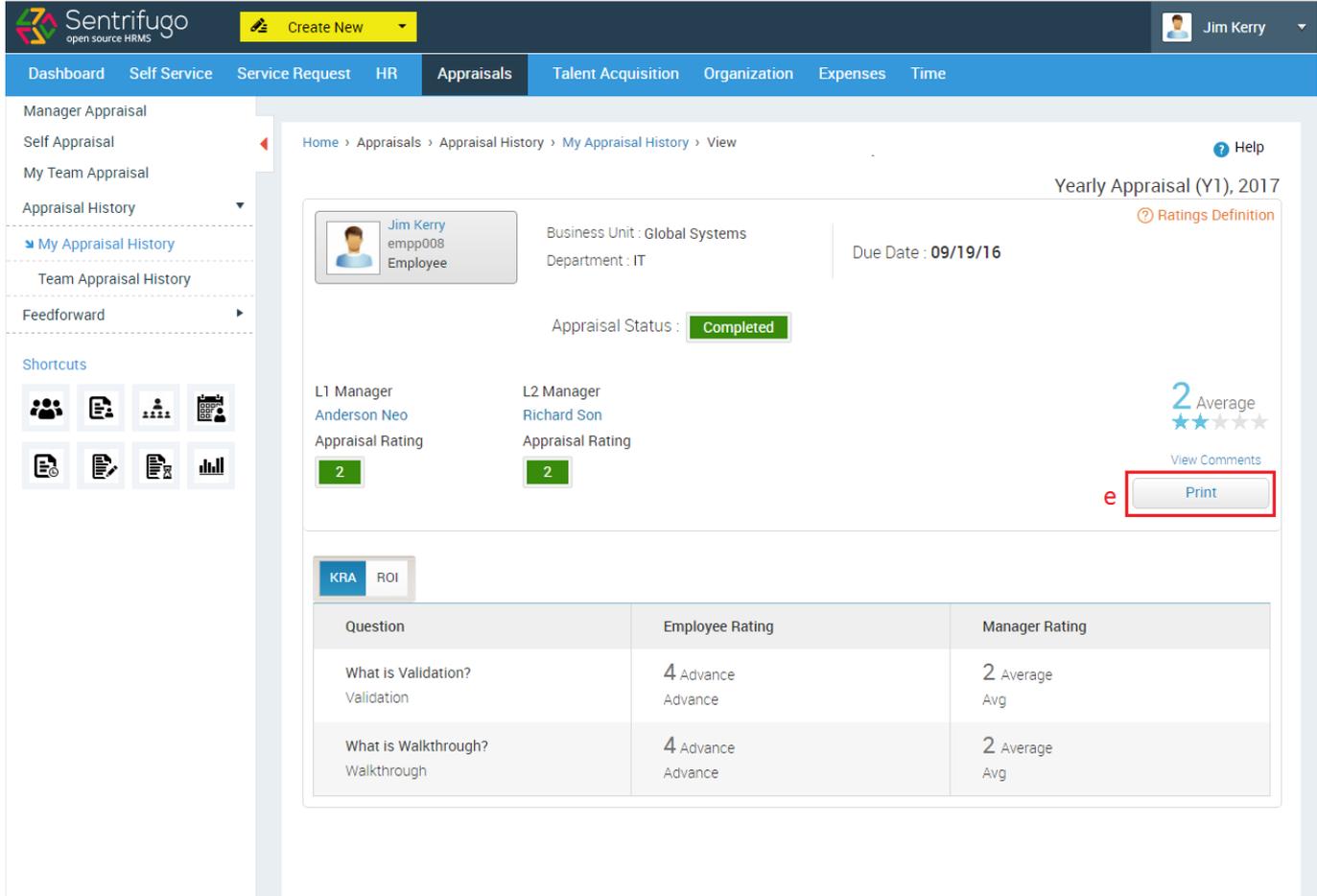


Figure 39

- Click **Appraisals** in the top menu

- b. Click **Appraisal History** on the left menu panel
- c. Click **My Appraisal History** in the submenu
- d. Click **View** icon

Please refer Figure 40



Home > Appraisals > Appraisal History > My Appraisal History > View

Yearly Appraisal (Y1), 2017

Jim Kerry
empp008
Employee

Business Unit : Global Systems
Department : IT
Due Date : 09/19/16

Appraisal Status : **Completed**

L1 Manager: Anderson Neo
Appraisal Rating: **2**

L2 Manager: Richard Son
Appraisal Rating: **2**

2 Average
★★★★★
View Comments

Print

Question	Employee Rating	Manager Rating
What is Validation? Validation	4 Advance Advance	2 Average Avg
What is Walkthrough? Walkthrough	4 Advance Advance	2 Average Avg

Figure 40

You can view your closed appraisal details here.

- e. Click **Print** button to print your appraisal details

How do I view my team's Appraisal History?

Please refer Figure 41

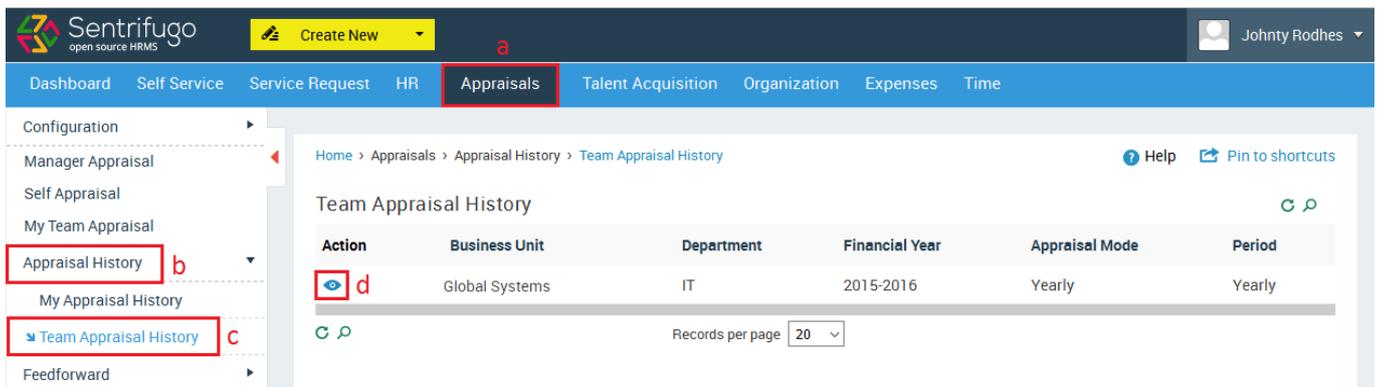


Figure 41

- a. Click **Appraisals** in the top menu
- b. Click **Appraisal History** on the left menu panel
- c. Click **Team Appraisal History** in the submenu
- d. Click **View** icon

Please refer Figure 42

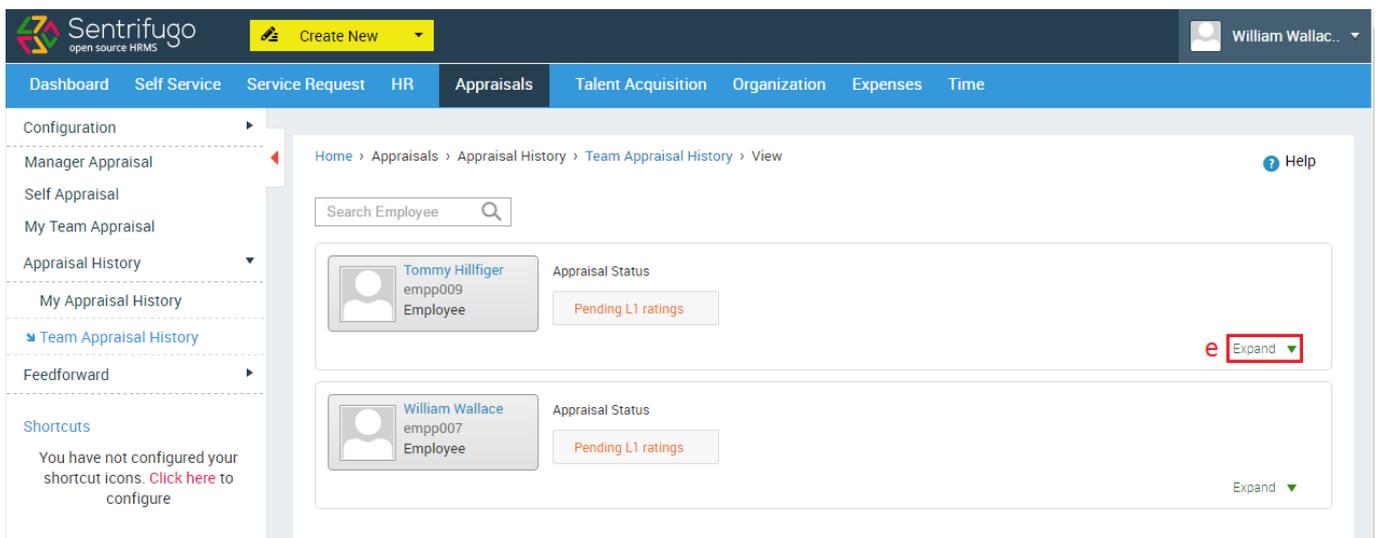
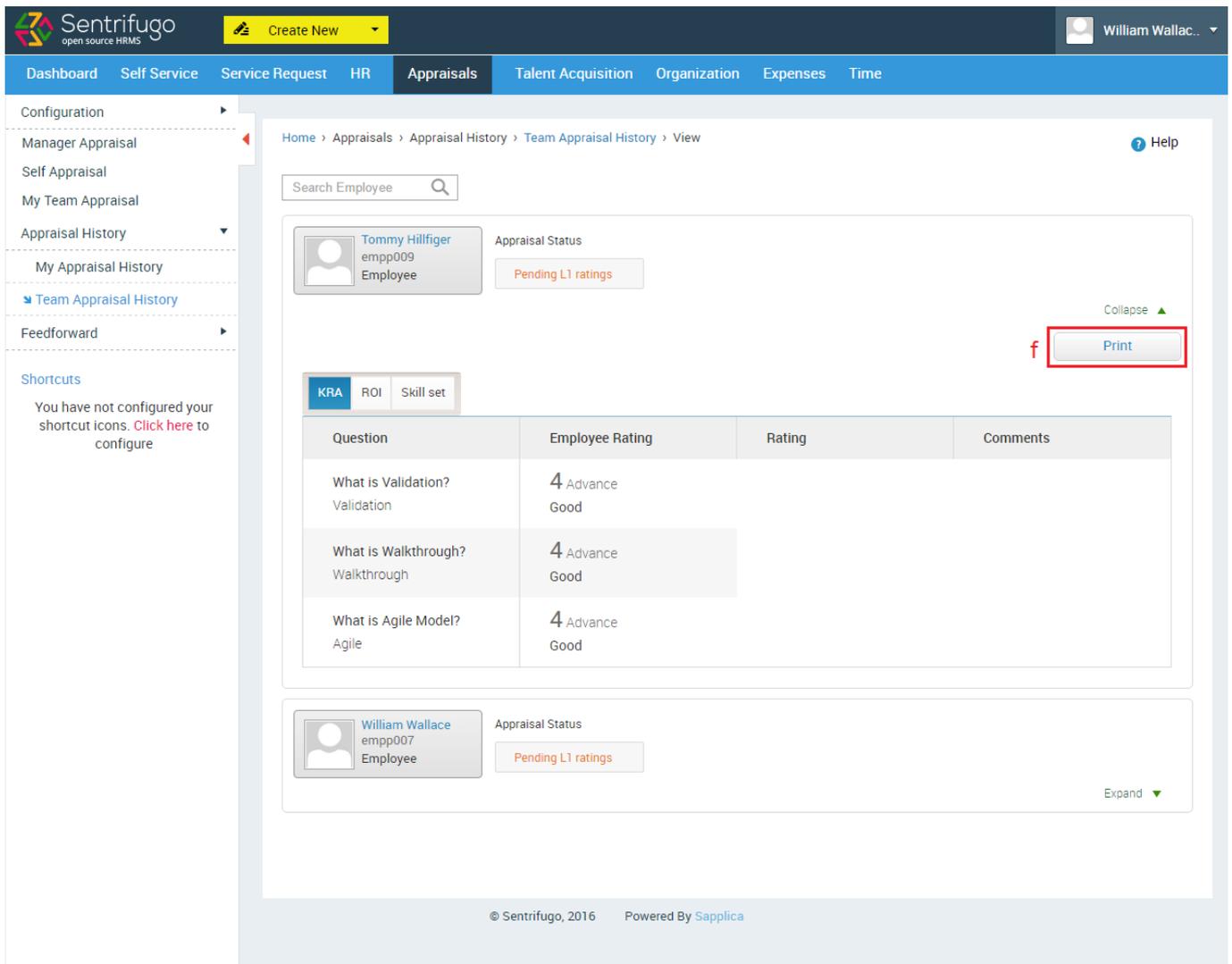


Figure 42

- e. Click **Expand** for any employee to view more details

Please refer Figure 43



Sentrifugo open source HRMS | Create New | William Wallac...

Dashboard | Self Service | Service Request | HR | **Appraisals** | Talent Acquisition | Organization | Expenses | Time

Configuration | Manager Appraisal | Self Appraisal | My Team Appraisal | Appraisal History | My Appraisal History | **Team Appraisal History** | Feedforward | Shortcuts

You have not configured your shortcut icons. [Click here to configure](#)

Home > Appraisals > Appraisal History > Team Appraisal History > View

Search Employee

Tommy Hillfiger
 empp009
 Employee

Appraisal Status
 Pending L1 ratings

Collapse ▲ | **f** Print

Question	Employee Rating	Rating	Comments
What is Validation? Validation	4 Advance Good		
What is Walkthrough? Walkthrough	4 Advance Good		
What is Agile Model? Agile	4 Advance Good		

William Wallace
 empp007
 Employee

Appraisal Status
 Pending L1 ratings

Expand ▼

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Figure 43

f. Click **Print** to print your employee's closed appraisal form