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:

Initialize Appraisal consists of 3 steps:
-Provide Appraisal details and add Ratings
-Choose Line Managers
-Configure Parameters & Questions

Initialize Appraisal

Management, HR
(Only Specific Dept)

Enable to Managers

Enable to Employees

Initialize Appraisal

Management, HR
(Only Specific Dept)

Eligible Employees Provide Self-Appraisal Details and Send it to L1 Manager

Managers Give Ratings & Comments Against Employee's Self Appraisal Inputs

The L1 Manager can provide ratings/comments and add skills. The L2/L3 Managers can only provide the **overall** ratings/comments.

Close Appraisal Cycle

Management, HR
(Only Specific Dept)

Initialize Feedforward for Appraisal Employees/All Employees in the organization

Management

Employees provide feedback about their Managers

View Feedback and Close Feedforward

Management

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

Figure 1

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

Please refer Figure 2
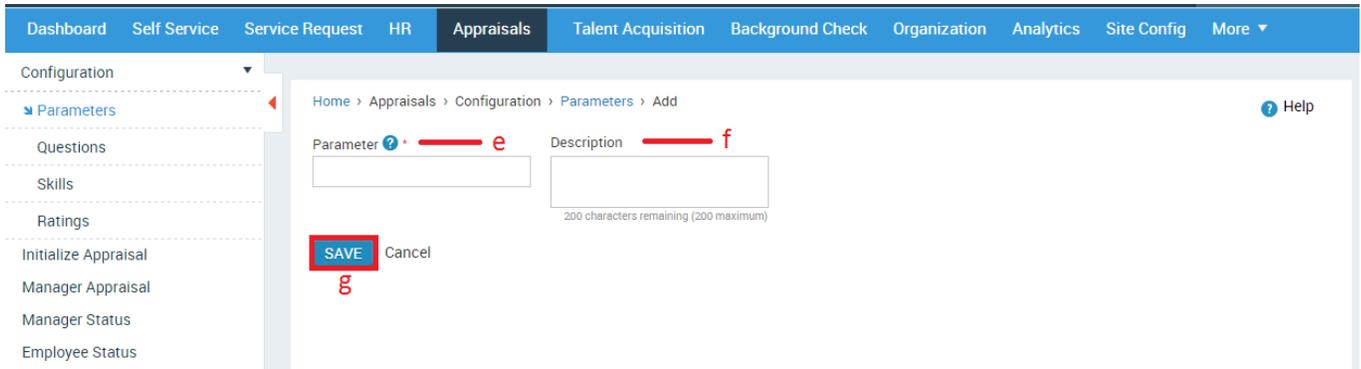
Figure 2

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
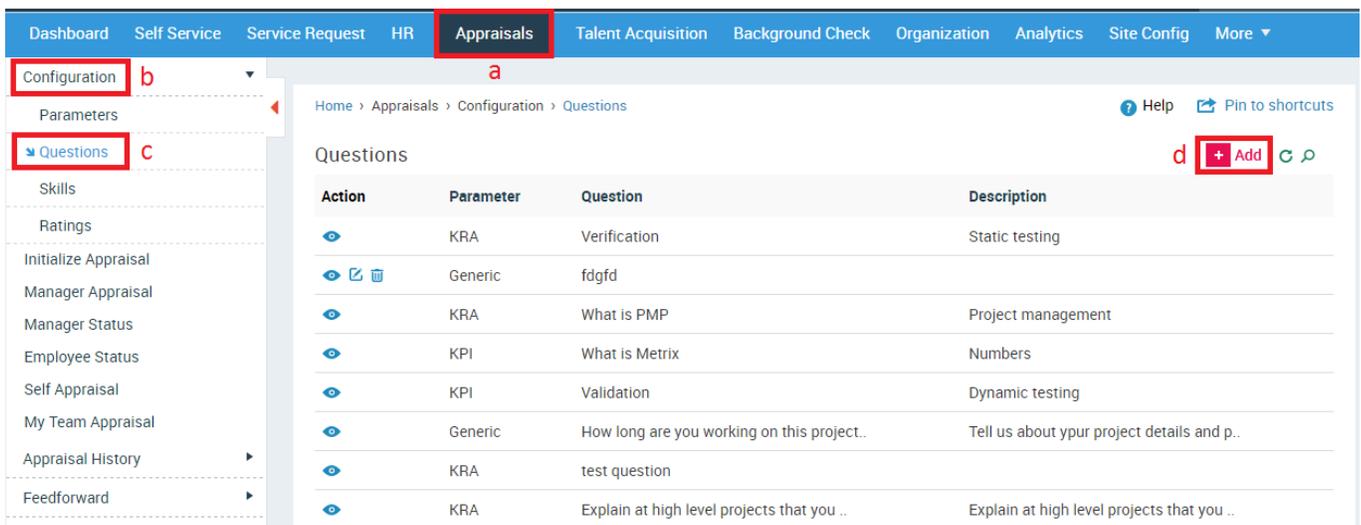
Figure 3

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
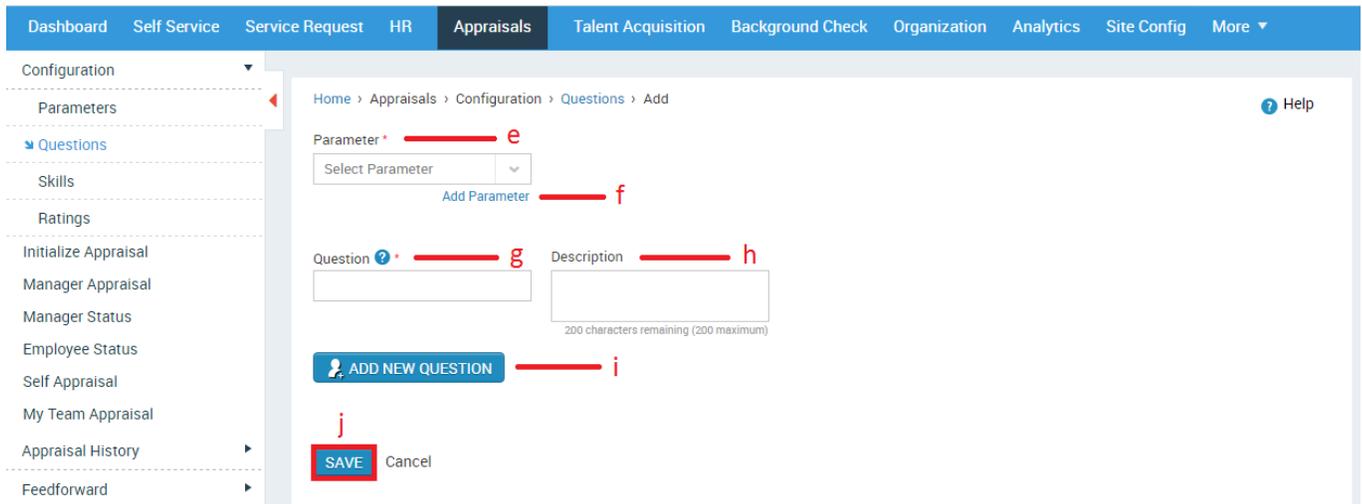
Figure 4

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
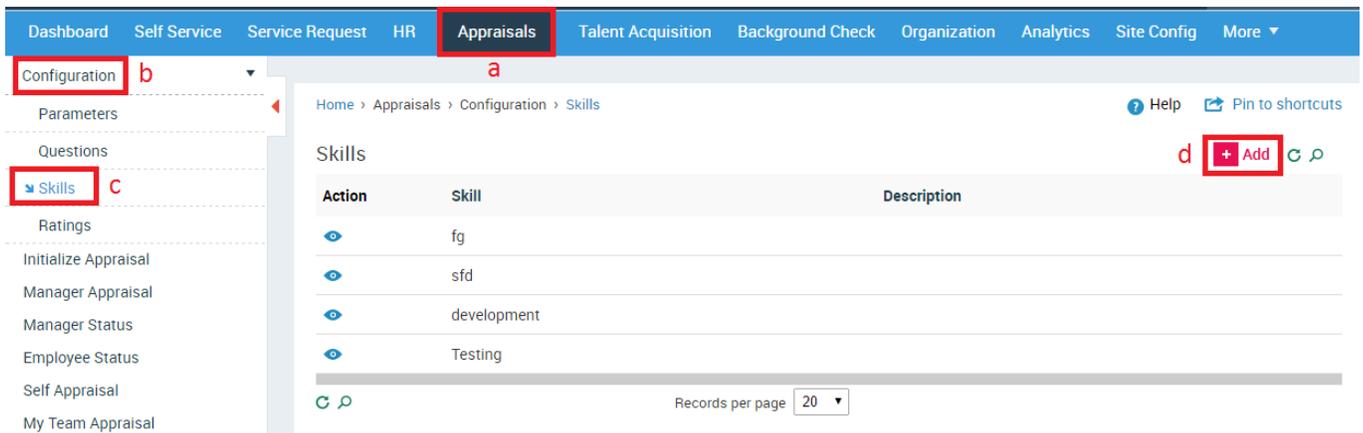
Figure 5

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
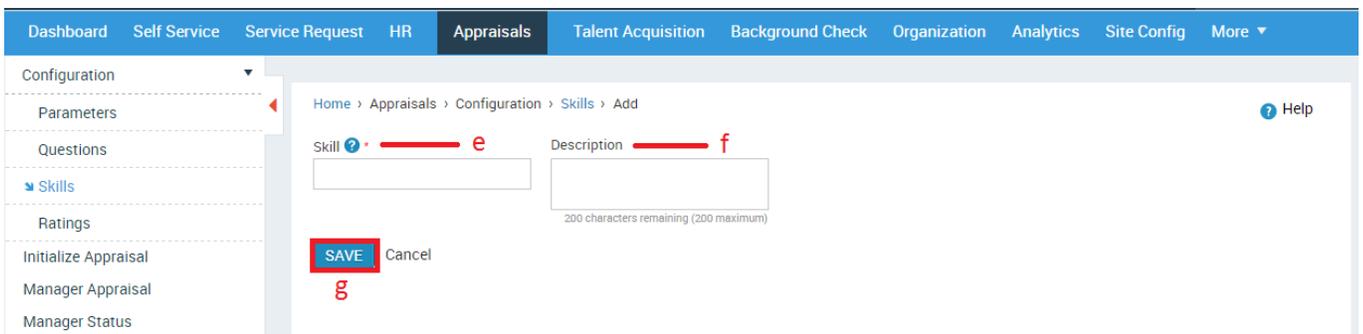
Figure 6

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
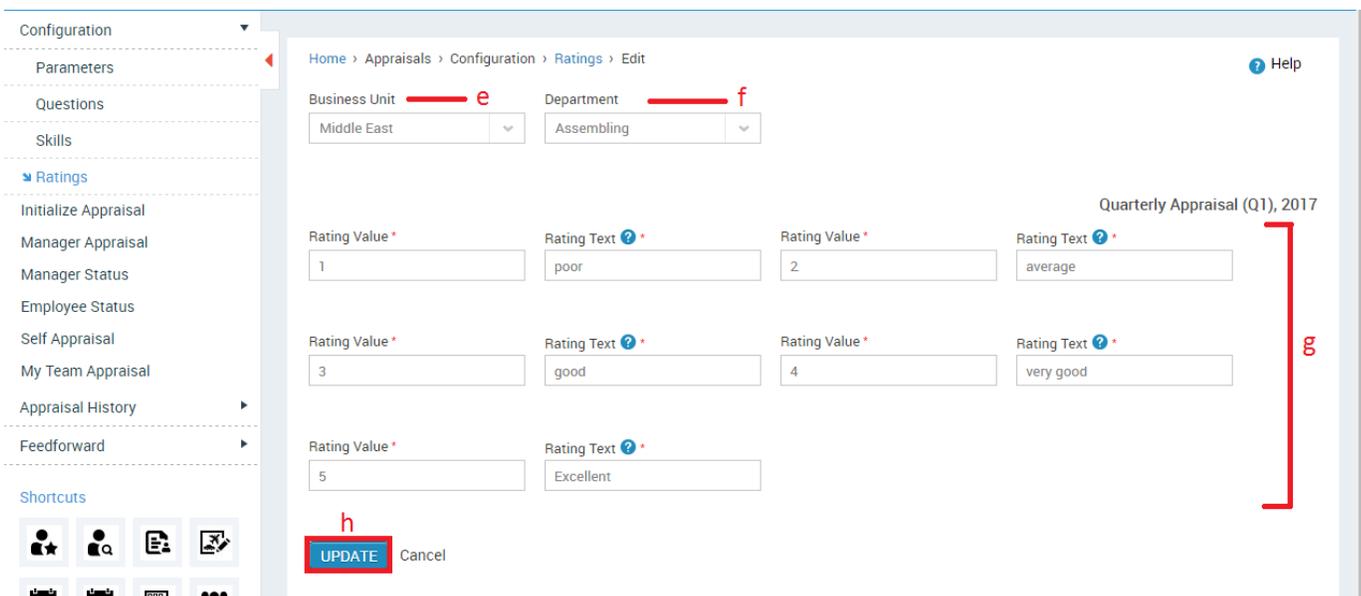
Figure 8

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

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
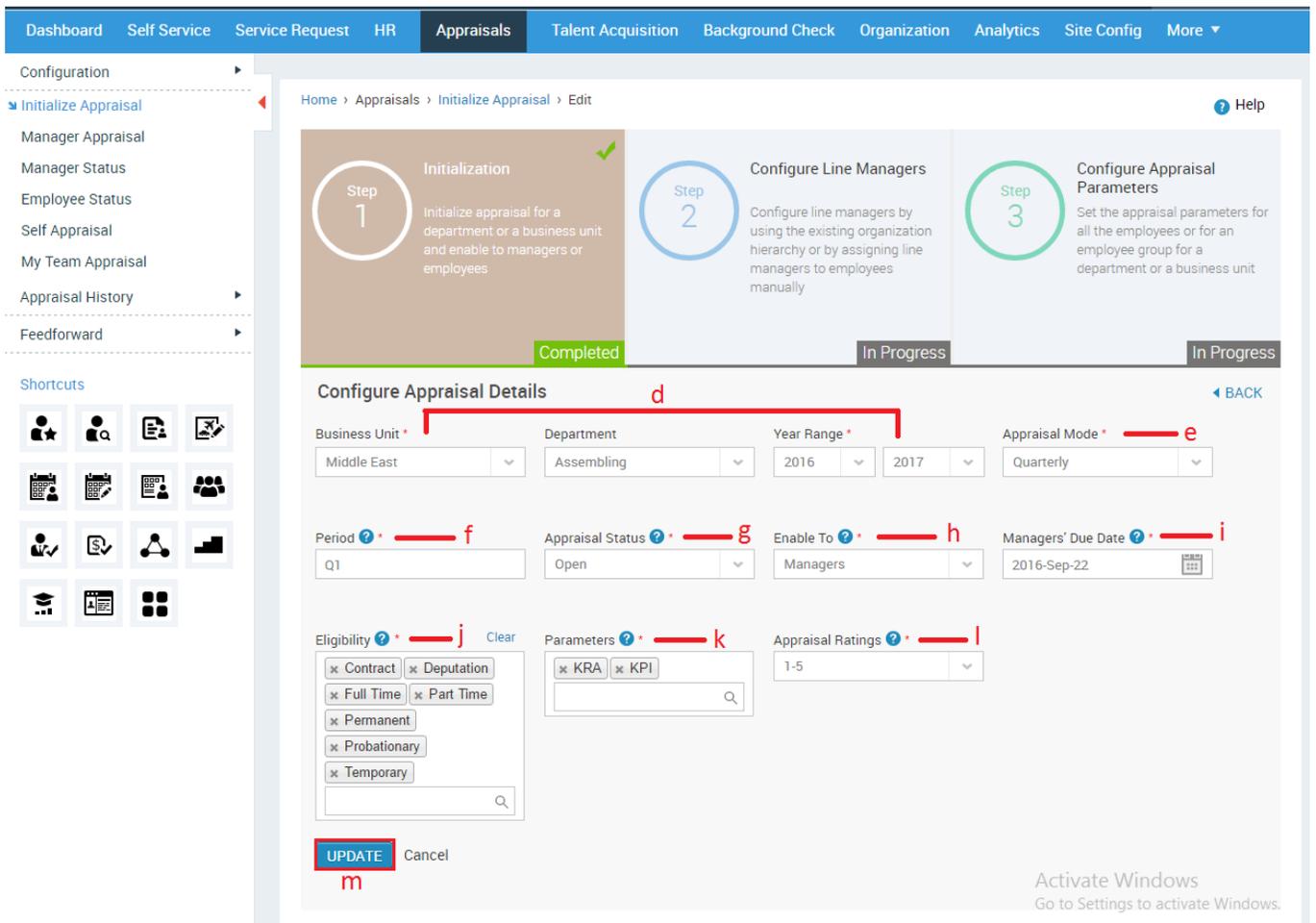
Figure 10

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

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
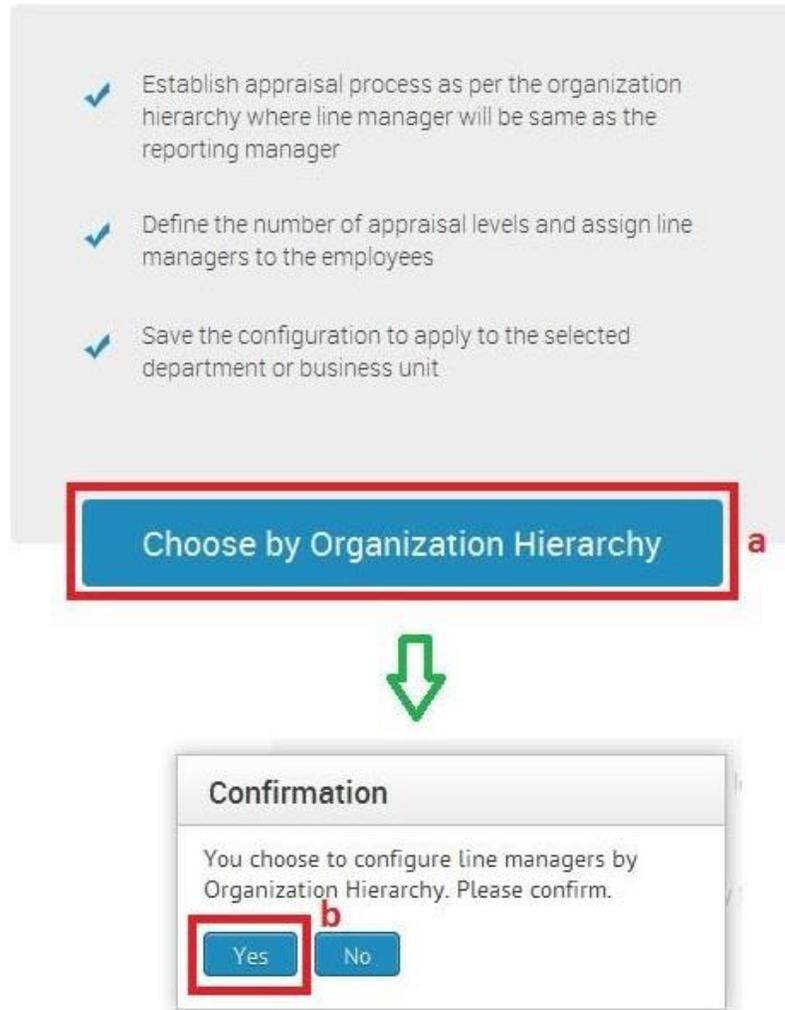
Figure 12

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

A small confirmation window will appear.

b. Click **Yes** button

Please refer Figure 13

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

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
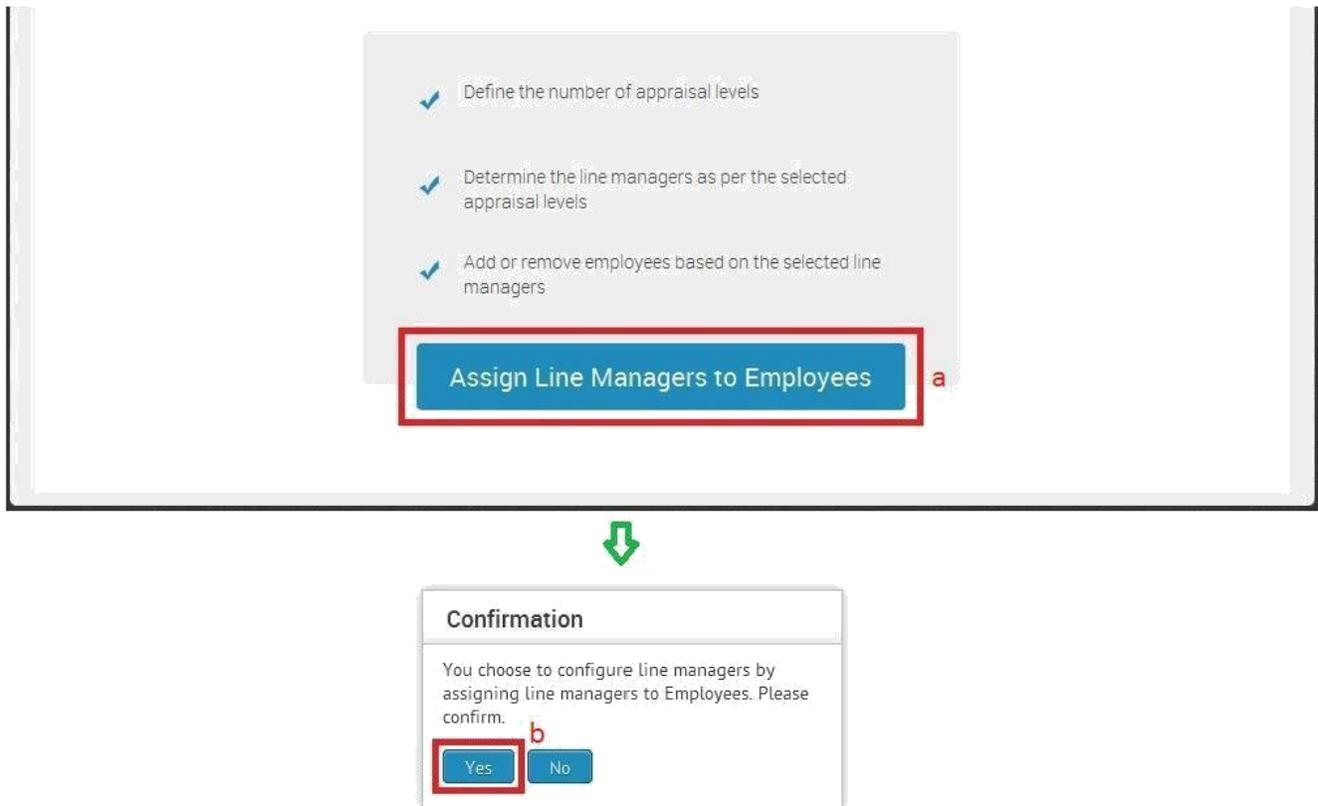
Figure 15

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

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 16
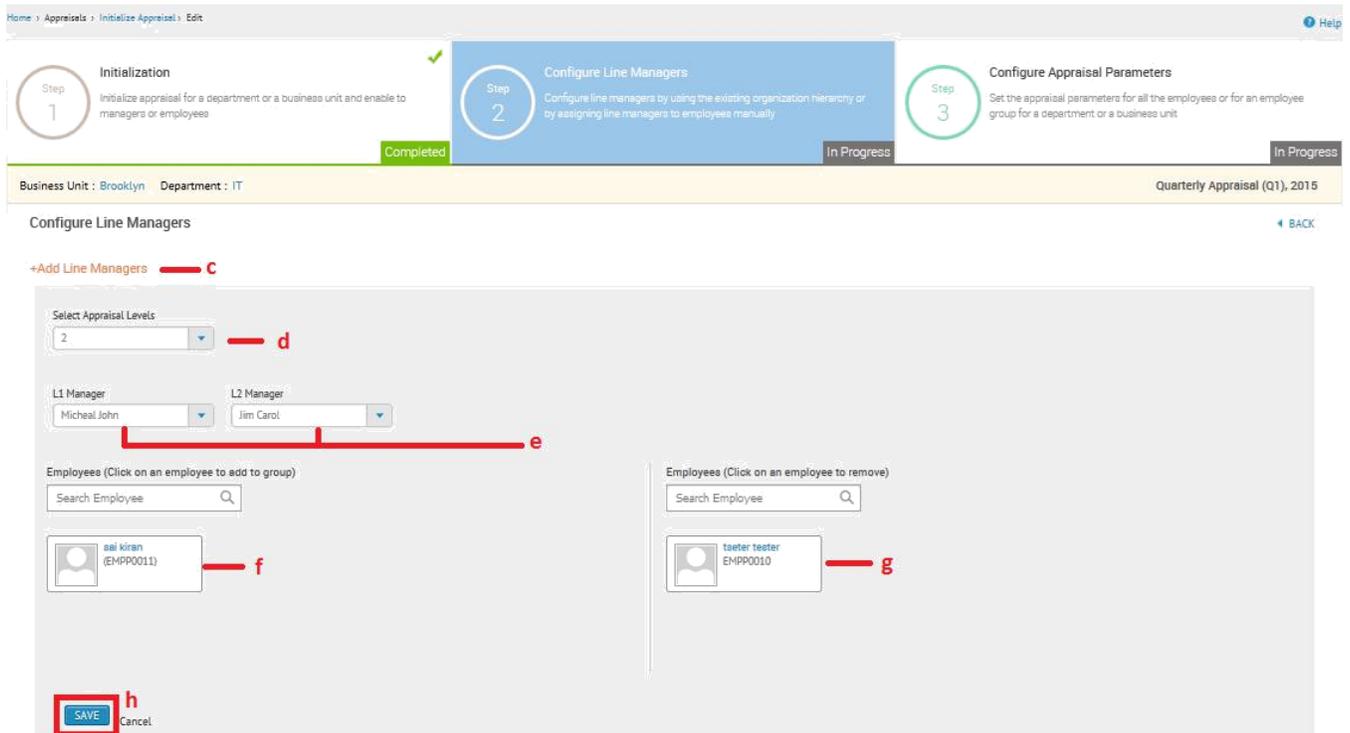
Figure 16

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
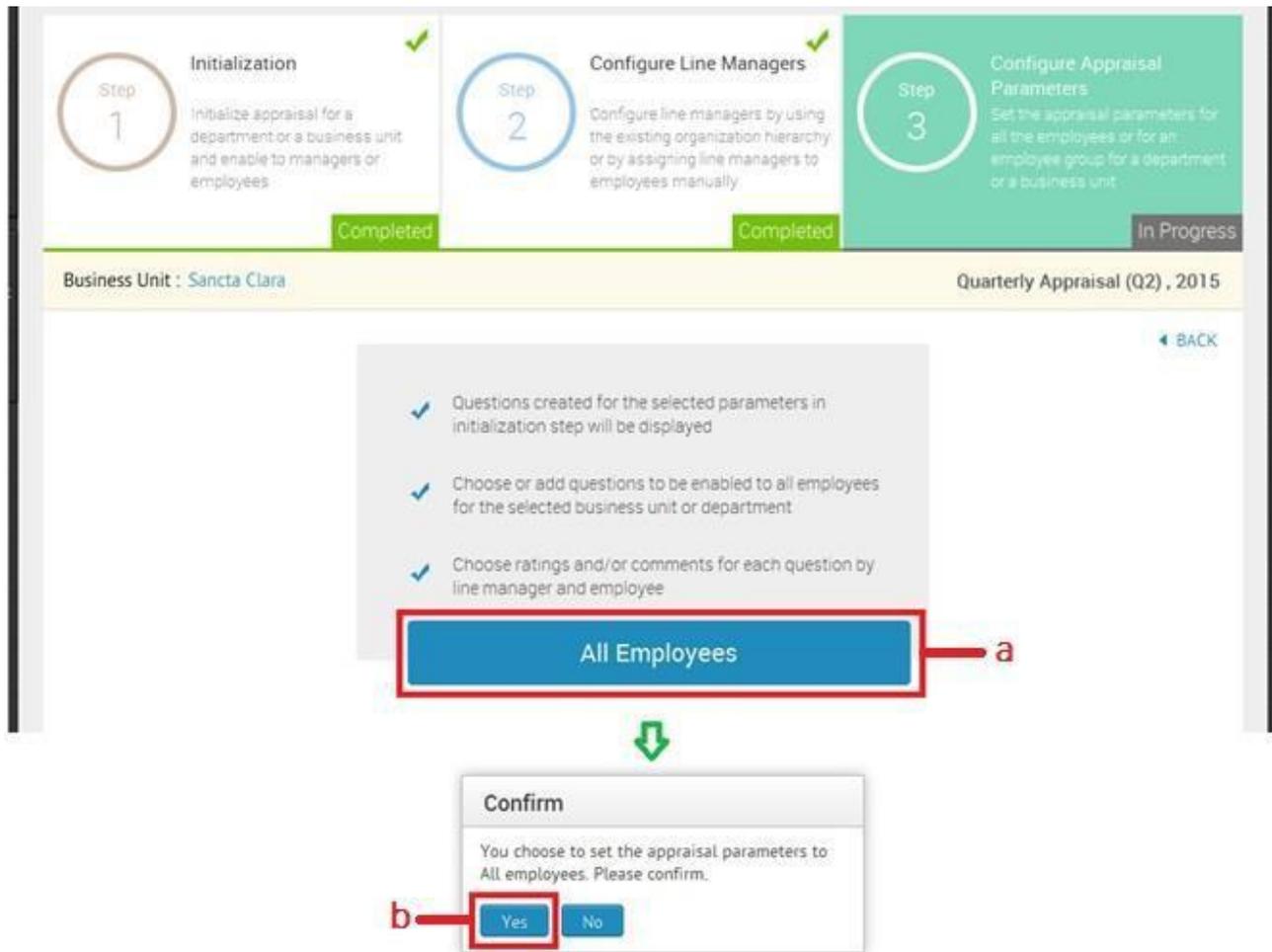
Figure 17

a.   Click **All Employees**

A small confirmation window will open

b.   Click **Yes** button

Please refer Figure 18
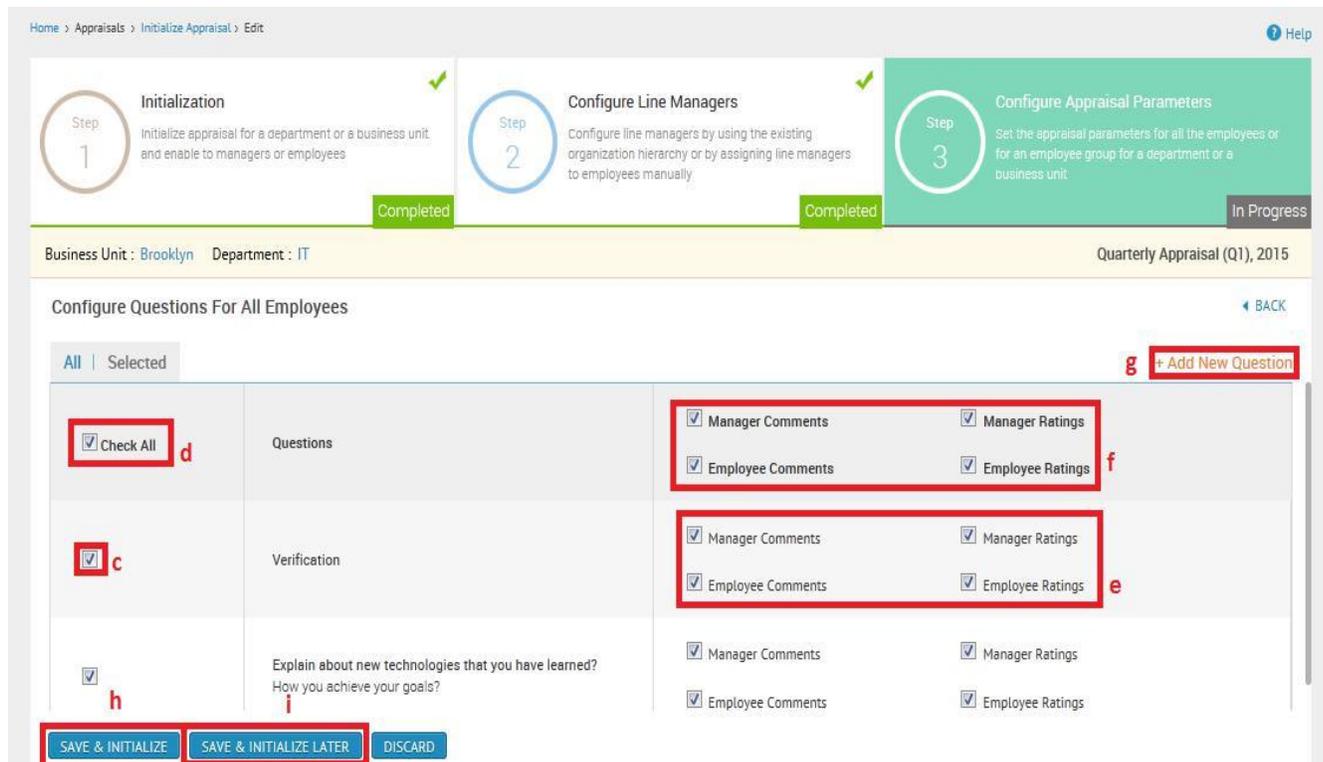
Figure 18

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
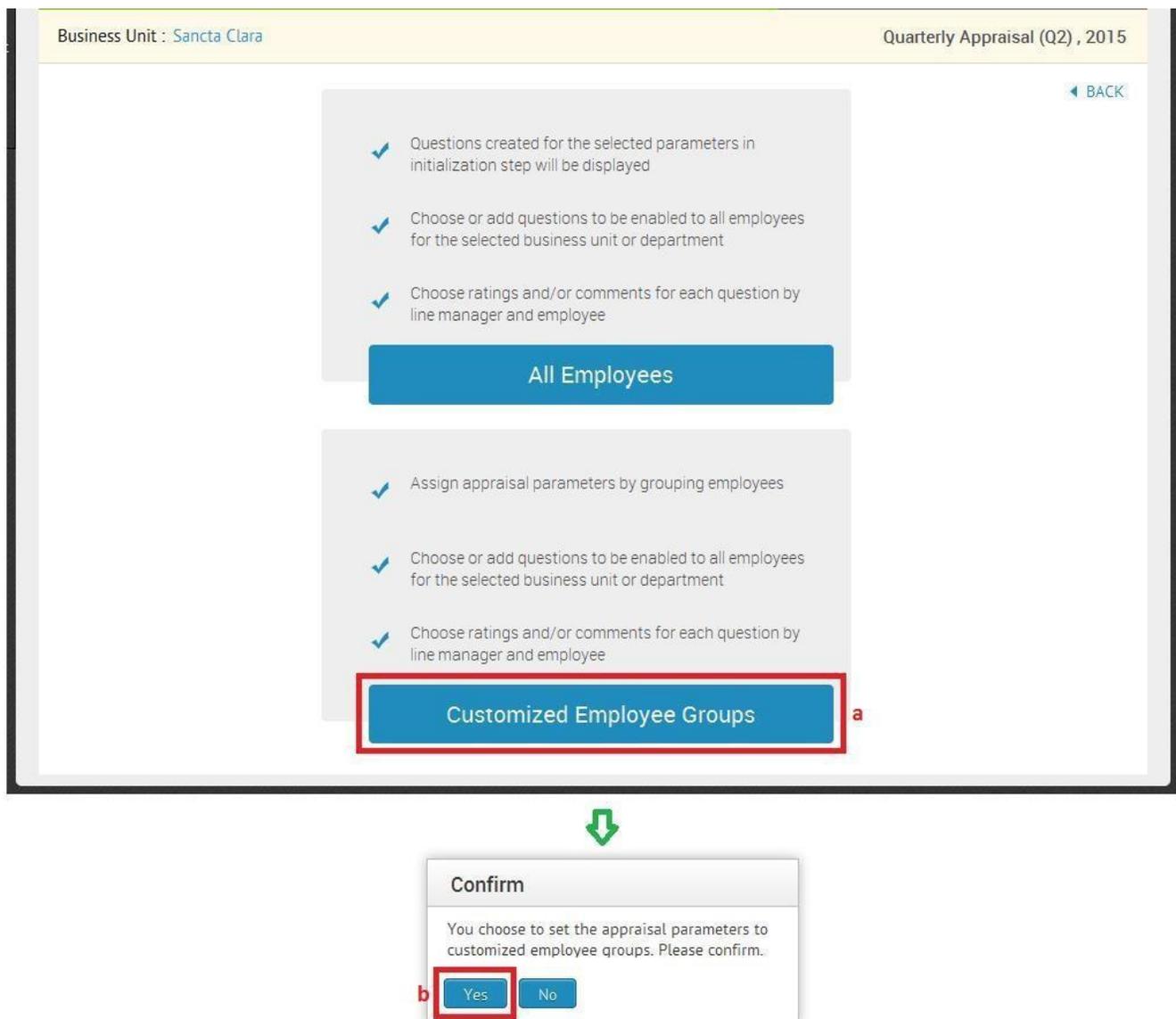
Figure 19

a. Click **Customized Employee Groups**

A small confirmation window will open

b. Click **Yes** button

Please refer Figure 20

Figure 20

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

<p style="text-align:center;">**Or**</p>

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.

<p style="text-align:center;">**Or**</p>

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

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
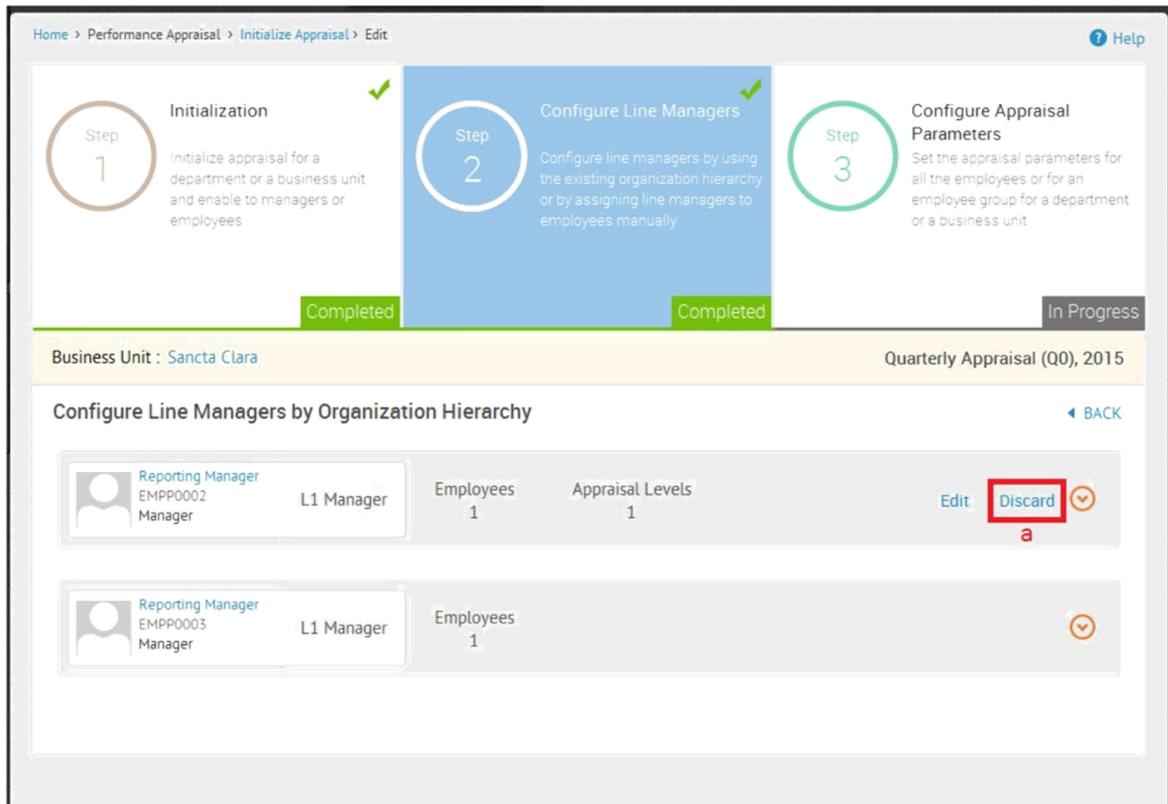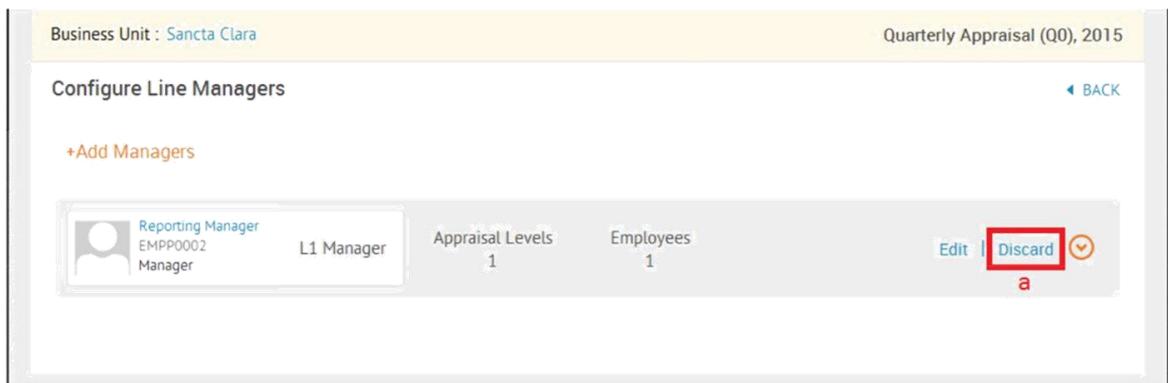
Figure 22

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

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

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

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

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
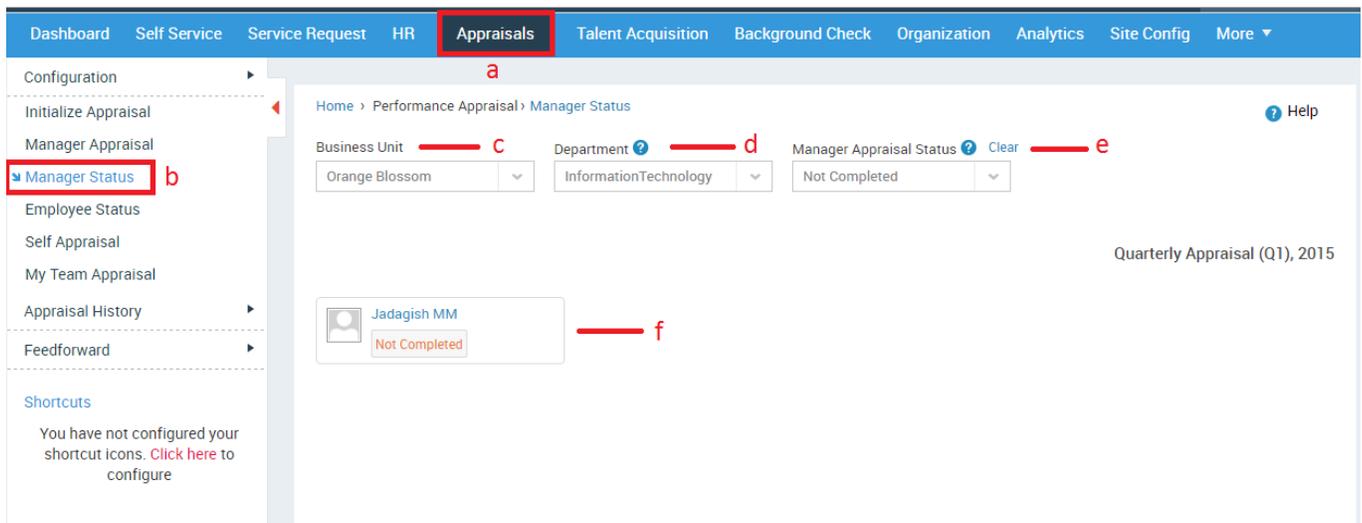
Figure 27

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
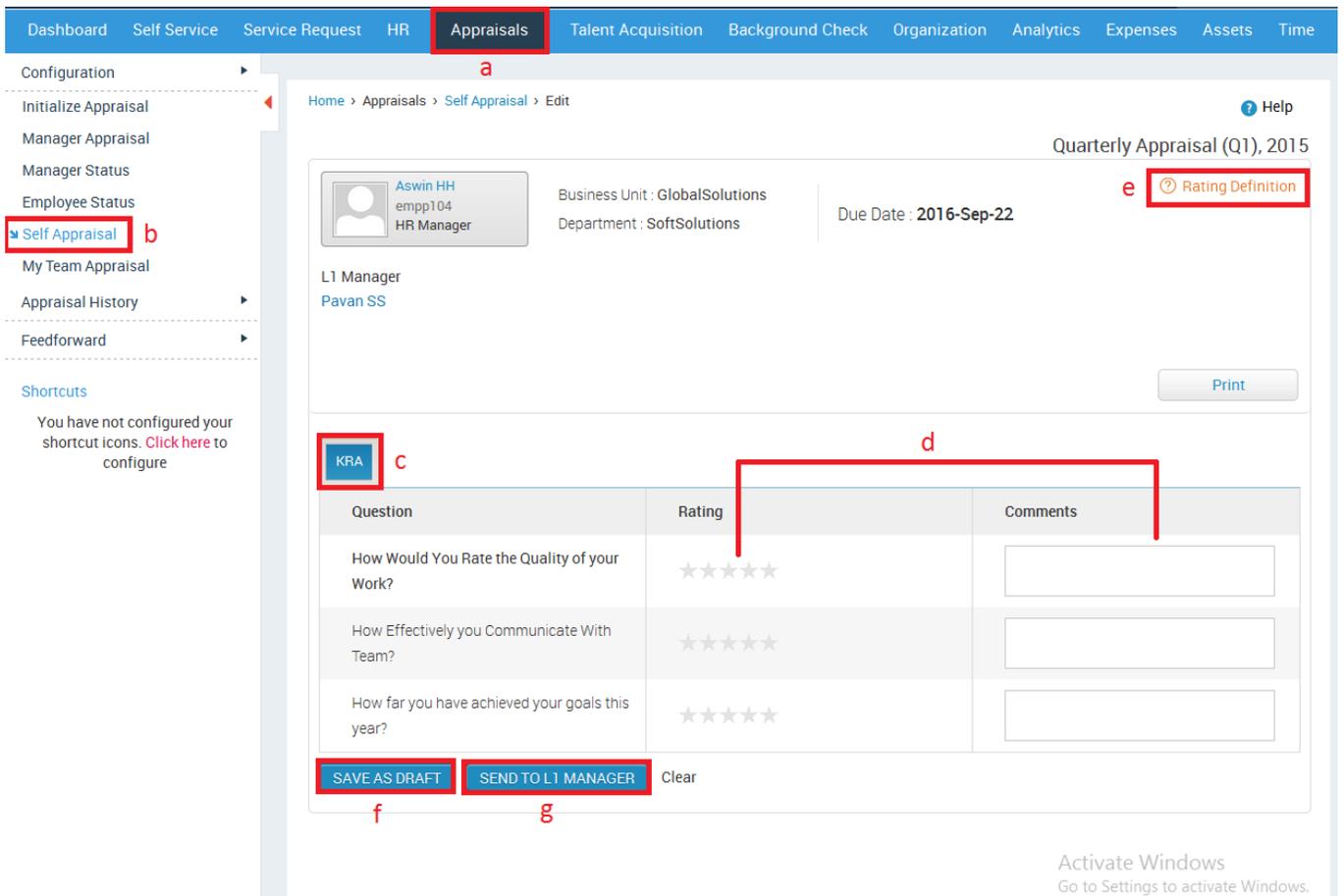
Figure 28

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

Figure 29

a. Click **Appraisals** in the top menu
b. Click **My Team Appraisal** on the left menu panel
c. All the Employees in the Manager's team will be displayed
d. The status of each Employee's appraisal is displayed
e. Click **Expand** option to provide Manager's rating
f. Provide overall rating and comment for an Employee
g. Provide the rating and comments for each question
h. Click **SUBMIT** button
i. 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
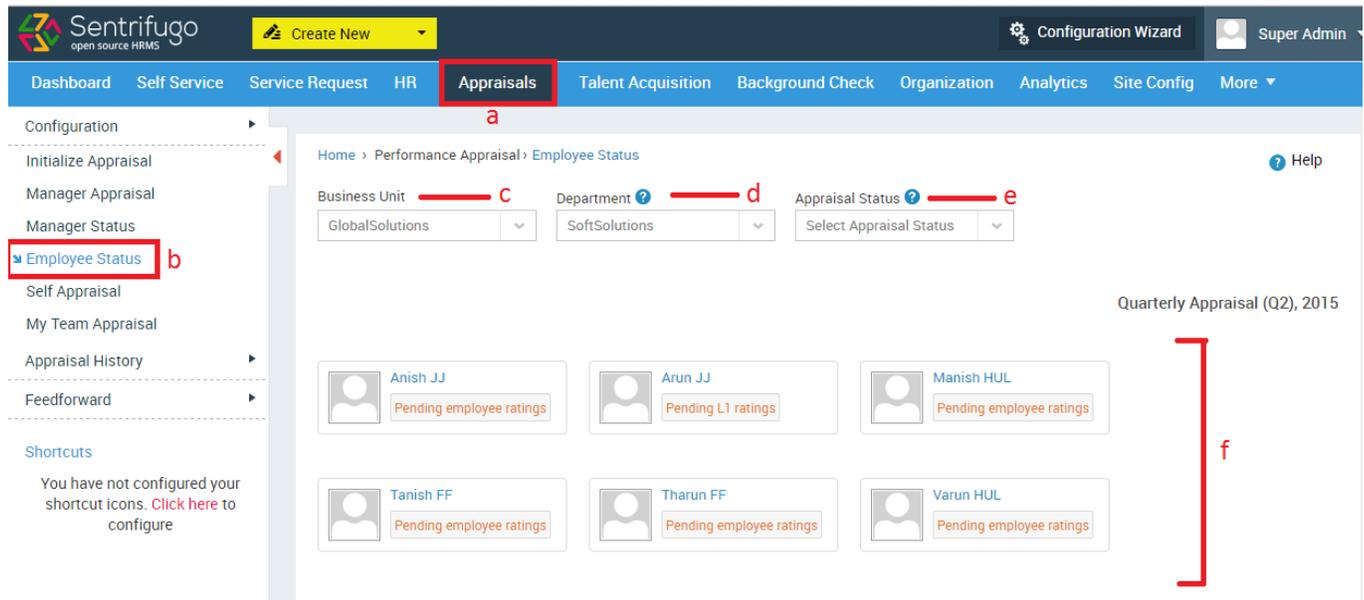
Figure 30

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.

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.
  - o **Show**: Employee names and their feedbacks will be displayed
  - o **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
  - o **Appraisal Employees**: All the Employees eligible for appraisal process can appraise their Managers
  - o **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
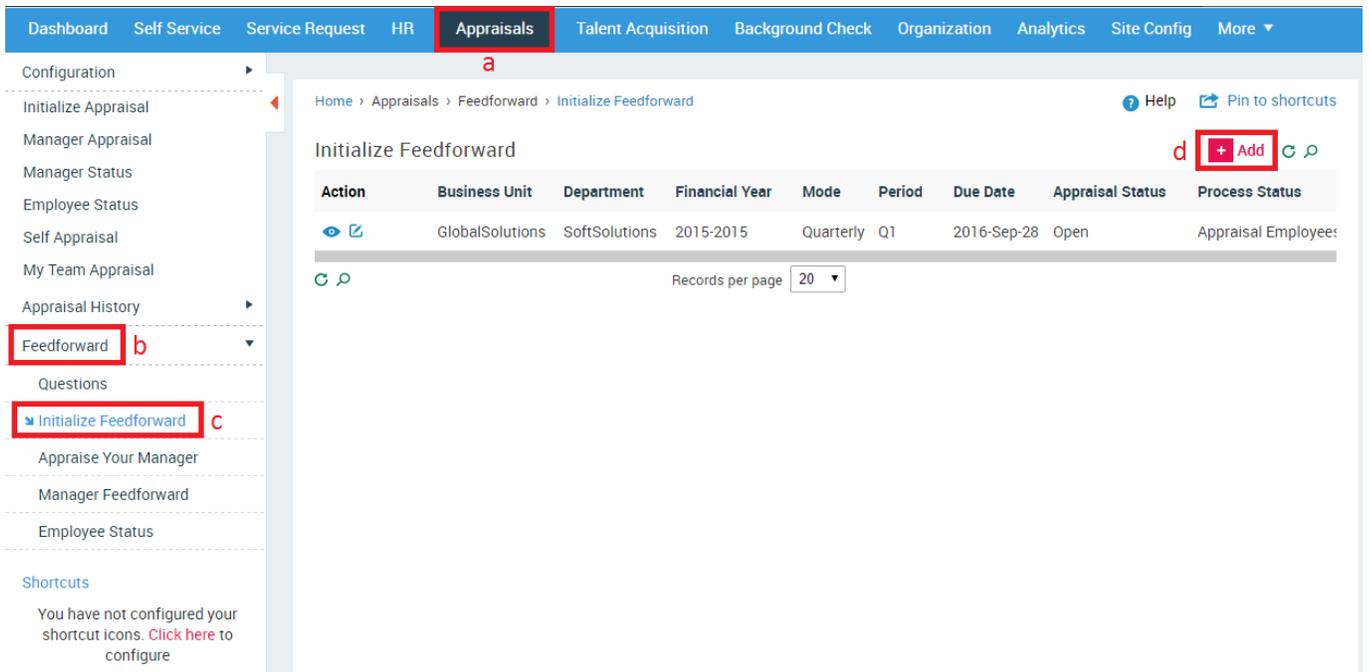
Figure 33

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
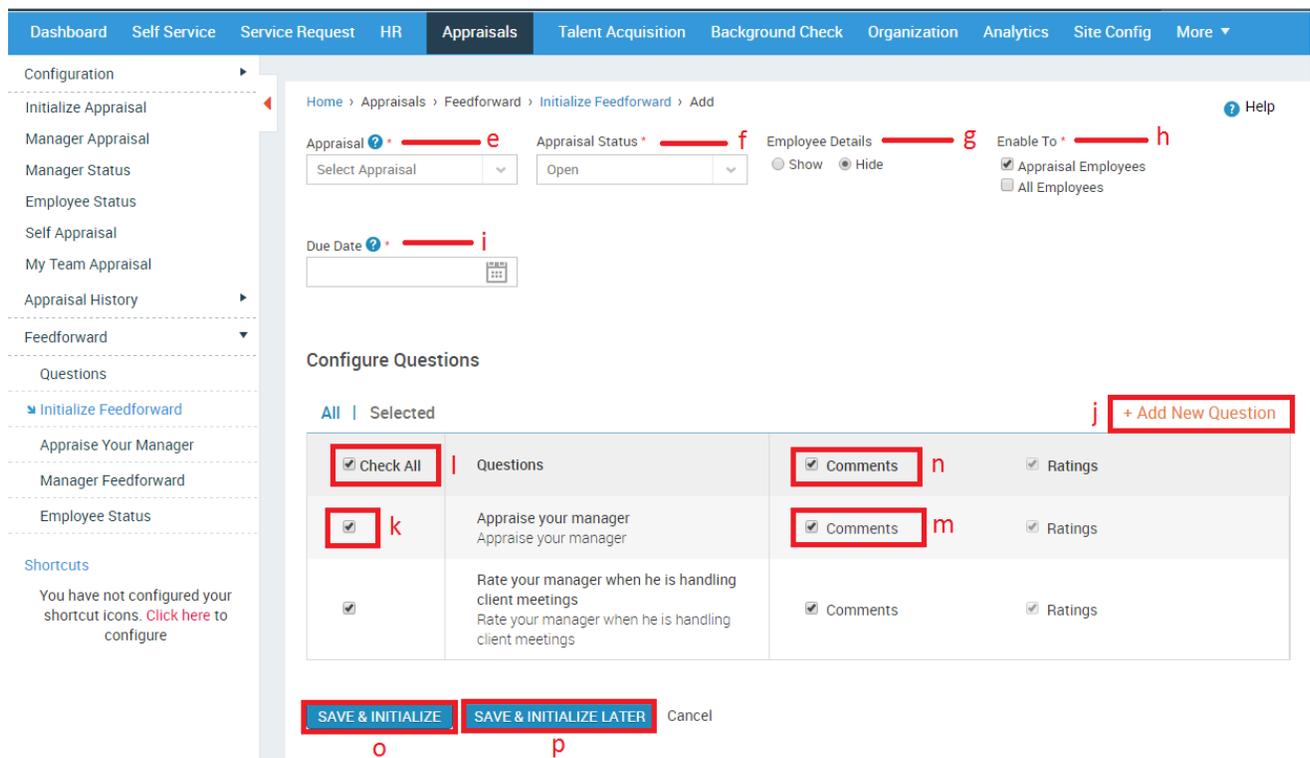
Figure 34

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

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
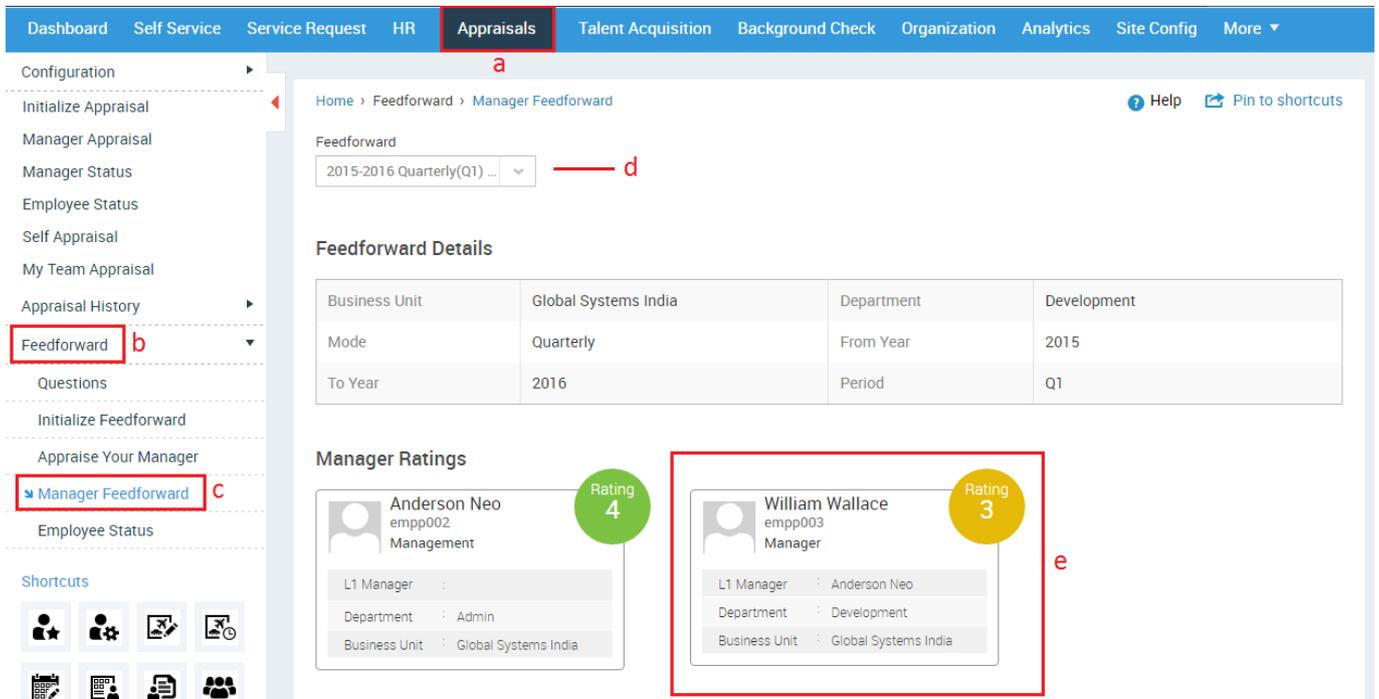
Figure 36

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

Please refer Figure 37

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
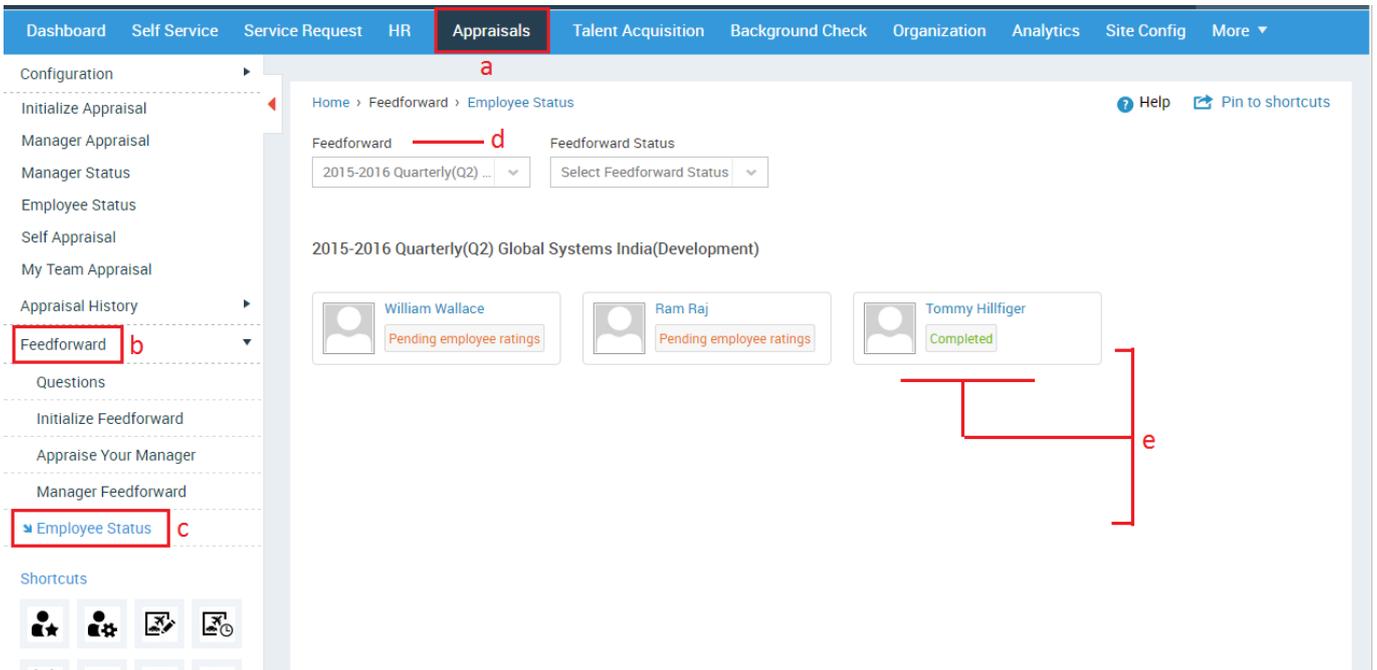
Figure 38

a. Click **Appraisals** in the top menu
b. Click **Feedforward** on the left menu panel
c. Click **Employee Status** in the submenu
d. Select a process to view Feedforward details in the dropdown
e. 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
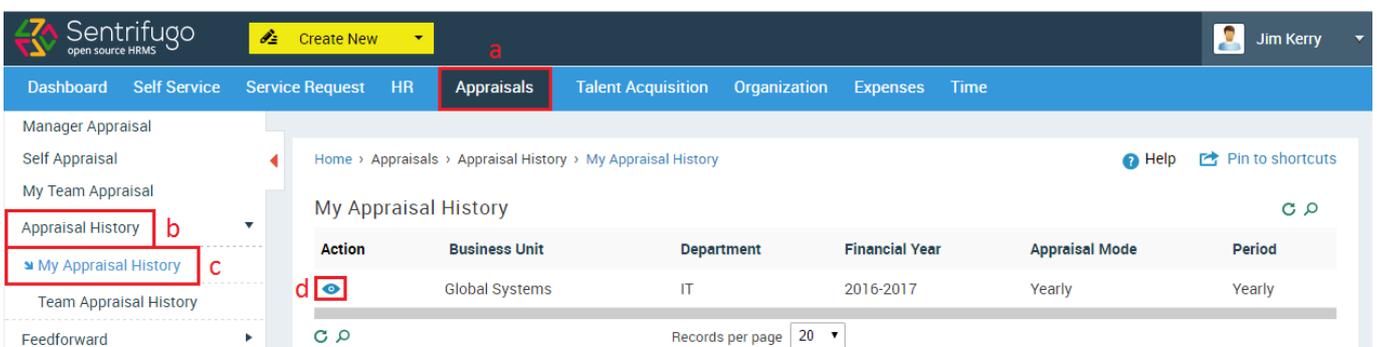
Figure 39

a. 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

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
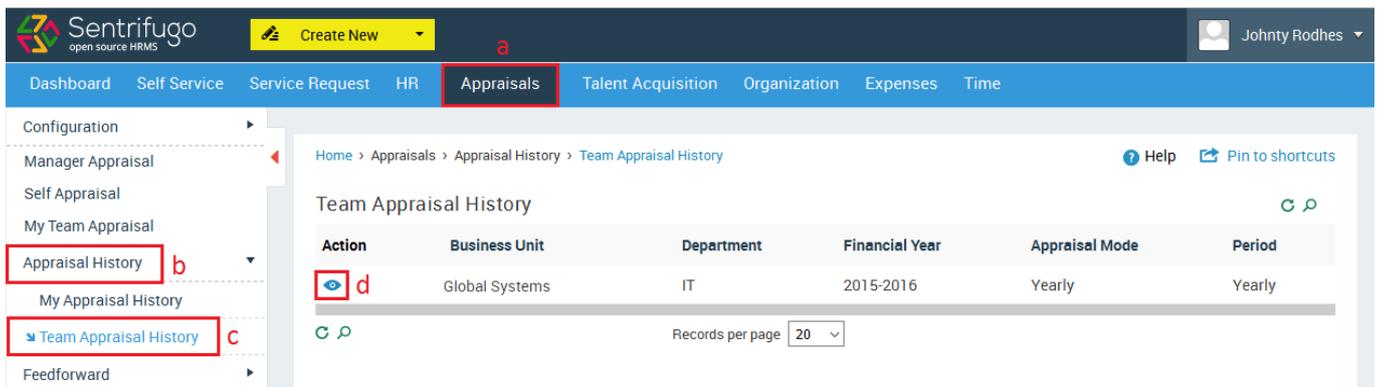
Figure 41

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
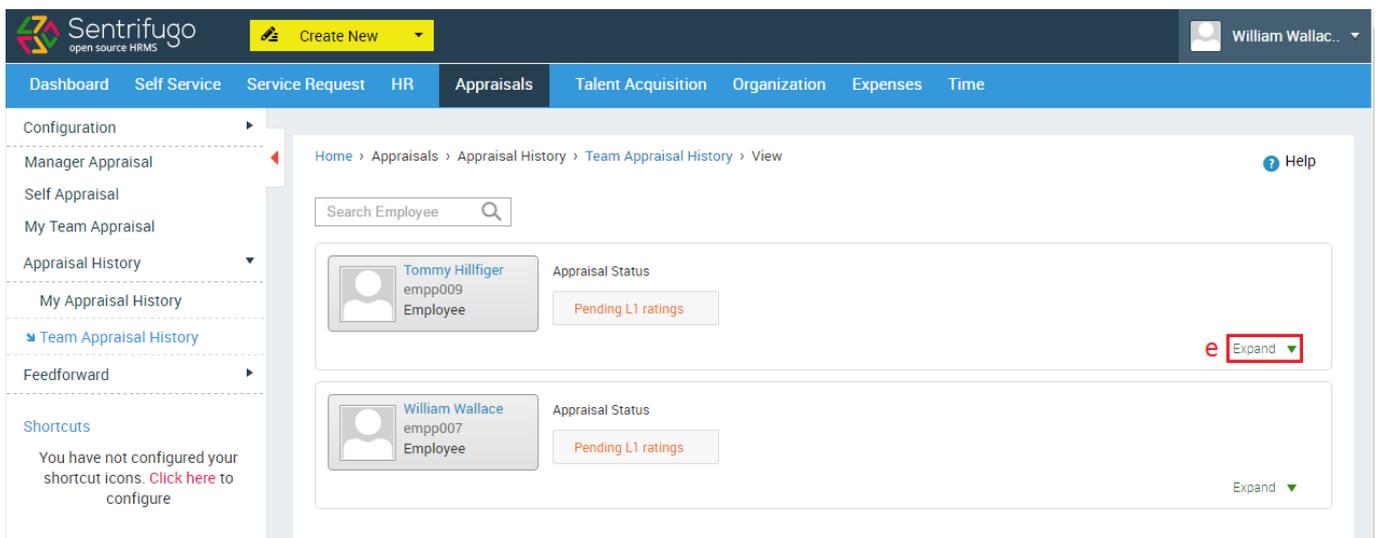
Figure 42

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

Please refer Figure 43

Figure 43

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