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Aviation Solutions

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Performance Evaluation

User Guide

Version 5.5

DISCLAIMER

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BUSINESS PROCESS: PERFORMANCE EVALUATION

■   **Scenario 1 Details: Evaluation set up and initiating an evaluation process for a group of employees with common set of objectives.**

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
1.	User creates Appraisal Period	HR Manager	Evaluation Setup	Record Appraisal Period	Record Appraisal Period	▸ Select the Evaluation setup unit. ▸ Enter the Appraisal Period Details.
2.	User creates Evaluation Objectives	HR Manager	Evaluation Setup	Record Evaluation Objectives	Record Evaluation Objectives	▸ Select the Evaluation Setup Unit Select the goal category for which the objectives have to be defined. ▸ Enter the Objective Code, Key Performance Indicators, Performance Measurement Metrics and Remarks. ▸ Specify whether the objective is to be mapped to all the employees.
3.	User Creates Performance Grades	HR Manager	Evaluation Setup	Record Performance Grades	Record Performance Grades	▸ Select the Evaluation Setup Unit Select performance grades for objectives. ▸ Enter the lower limit and the upper limit.

Sl. #	Flow of Events	Primary Actor(s)	Business Component	Activity	Page	Functional Steps
4.	User Creates an Evaluation Template	HR Manager	Evaluation Setup	Record Evaluation Template	Record Evaluation Template	▶ Select the Evaluation set up unit . ▶ Select the evaluation period for which template has to be created. ▶ Enter the details of the template. ▶ Specify the goal category, objective code, key performance indicators, performance measurement metrics and Weightage. ▶ Compute the Weightage in percentage. ▶ Specify the Employment Unit, Process code, Job code, Gradeset and Grade code to which the template has to be mapped. ▶ Save the details entered.

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
5.	User initiates the Evaluation process in bulk	HR Manager	Evaluation Administration	Initiate Evaluation (Bulk)	Initiate Evaluation (Bulk)	▸ Select the Evaluation Processing Unit for which Evaluation has to be carried out. ▸ Select the appraisal period for which evaluation template has been created and evaluation process has to be initiated. ▸ Select the panel of evaluators as self and/or Supervisor and/or rule. ▸ Specify the cut off date or a rule specifying the cut off date till which the evaluation has to be initiated. ▸ Select the Process, Gradeset and Grade for which the evaluation process has to be initiated. ▸ Initiate the process. ▸ View error log ▸ Take necessary action for error if any logged.

■ **Scenario 2 Details: Evaluation set up and initiating an evaluation process for an employee with different set of objectives.**

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
1.	User creates Appraisal Period	HR Manager	Evaluation Setup	Record Appraisal Period	Record Appraisal Period	▶ Select the Evaluation set up Unit ▶ Enter the Appraisal Period Details.
2.	User creates Evaluation Objectives	HR Manager	Evaluation Setup	Record Evaluation Objectives	Record Evaluation Objectives	▶ Select the Evaluation Setup Unit ▶ Select the goal category for which the objectives have to be defined. ▶ Enter the Objective Code, Key Performance Indicators, Performance Measurement Metrics and Remarks. ▶ Specify whether the objective is to be mapped to all the employees.
3.	User Creates Performance Grades	HR Manager	Evaluation Setup	Record Performance Grades	Record Performance Grades	▶ Select the Evaluation Setup Unit ▶ Select performance grades for skills or objectives. ▶ Enter the lower limit and the upper limit.

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
4.	User Creates an Evaluation Template	HR Manager	Evaluation Setup	Record Evaluation Template	Record Evaluation Template	▸ Select the Evaluation Setup Unit . ▸ Select the evaluation period for which template has to be created. ▸ Enter the details of the template. ▸ Specify the goal category, objective code, key performance indicators, performance measurement metrics and Weightage. ▸ Compute the Weightage in percentage. ▸ Specify the Employment Unit, Process code, Job code, Gradeset and Grade code to which the template has to be mapped. ▸ Save the details entered.

Sl. #	Flow of Events	Primary Actor(s)	Business Component	Activity	Page	Functional Steps
5.	User initiates the Evaluation process in bulk	HR Manager	Evaluation Administration	Initiate Evaluation (Bulk)	Initiate Evaluation (Bulk)	▶ Select the Appraisal Processing Unit for which Evaluation has to be carried out. ▶ Select the appraisal period for which evaluation template has been created and evaluation process has to be initiated. ▶ Select the panel of evaluators as self and/or Supervisor and/or rule. ▶ Specify the cut off date or a rule specifying the cut off date till which the evaluation has to be initiated. ▶ Select the Process, Gradeset and Grade for which the evaluation process has to be initiated. ▶ Initiate the process. ▶ View error log ▶ Take necessary action for error if any logged.

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
6.	User records a different set of objectives for a particular employee	HR Manager	Evaluation Administration	Record Employee Objectives	Record Employee Objectives	▶ Select the Appraisal Processing Unit for which Evaluation has to be carried out. ▶ Select the Appraisal Code for the evaluation process has been initiated. ▶ Check the override facility to overwrite the evaluation objectives already set at template level. ▶ Specify the goal category, objective code, key performance indicators, performance measurement metrics and Weightage. ▶ Compute the Weightage in percentage. ▶ Specify the evaluation panel by entering the evaluator code, username and relationship with the employee. Relationship with the employee can be Self, Peer, Supervisor, and Customer. ▶ Save the details of the objectives created specifically for the employee for the evaluation to be carried out.

■   **Scenario 3 Details: Self evaluation as a draft version.**

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
1	User login is self.					
2	User selects appraisal code and appraisee to perform evaluation	Employee	Evaluation Self Service	Perform Evaluation	Perform Evaluation	▶ Select the evaluation period for which evaluation has to be carried out. ▶ Select the employee code for evaluation. In this case relationship with employee will be Self.
3	User performs evaluation	Employee	Evaluation Self Service	Perform Evaluation	Perform Evaluation	▶ Enter the self-assessment details. ▶ Select the save as Draft and save the entered details.

■   **Scenario 4 Details: Evaluation other than self evaluation as a draft version.**

Sl. #	Flow of Events	Primary Actor(s)	Business Component	Activity	Page	Functional Steps
1	User login is other than self, that is User login can be a Supervisor/Peer, Customer/Other.					
2	User selects appraisal code and appraisee to perform evaluation	Employee	Evaluation Self Service	Perform Evaluation	Perform Evaluation	▶ Select the evaluation period for which evaluation has to be carried out. ▶ Select the employee code for evaluation. In this case relationship with employee will be Peer/Supervisor/Customer/Others
3	User performs evaluation	Employee	Evaluation Self Service	Perform Evaluation	Perform Evaluation	▶ Enter the Appraiser's Rating, Appraiser's Remarks and Other Remarks. ▶ Compute the overall rating. ▶ Select save as Draft to save as draft version.

■   **Scenario 5 Details: Self evaluation as a final version.**

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
1	User login is self.					
2	User selects appraisal code and appraisee to perform evaluation	Employee	Evaluation Self Service	Perform Evaluation	Perform Evaluation	▶ Select the evaluation period for which draft version of evaluation has been saved or evaluation has to be carried out. ▶ Select the employee code for evaluation. In this case relationship with employee will be Self.
3	User performs evaluation	Employee	Evaluation Self Service	Perform Evaluation	Perform Evaluation	▶ Enter or edit the self-assessment details. ▶ Select the save as Final and save the entered details

■   **Scenario 6 Details: Evaluation other than self evaluation as a final version.**

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
1	User login is other than self, that is User login can be a Supervisor/Peer, Customer/Other.					
2	User selects appraisal code and appraisee to perform evaluation	Employee	Evaluation Self Service	Perform Evaluation	Perform Evaluation	▸ Select the evaluation period for which evaluation has to be carried out. ▸ Select the employee code for evaluation. In this case relationship with employee will be Peer/Supervisor/Customer/Others
3	User performs evaluation	Employee	Evaluation Self Service	Perform Evaluation	Perform Evaluation	▸ Enter the Appraiser's Rating, Appraiser's Remarks and Other Remarks. ▸ Compute the overall rating. ▸ Select save as Draft to save as Final version.

■   **Scenario 7 Details: Consolidating appraisal rating.**

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
1	User consolidates Evaluation Ratings	HR Manager / Supervisor	Evaluation Administration	Consolidate Appraisal Rating	Consolidate Appraisal Rating	‣ Select the Evaluation Administration Unit for which Evaluation has been performed. ‣ Select the appraisal code for which evaluation has been carried out. ‣ Select the employee for whom ratings are to consolidated. ‣ Click on employee code to view the Appraisal done by all evaluators. ‣ Enter the Revised consolidated evaluation rating for the selected employee. ‣ Save the final ratings.

■   **Scenario 8 Details: Recording employee feedback for self.**

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
1	User records employee feedback.	HR Manager / Supervisor	Evaluation Administration	Record Employee Feedback	Record Employee Feedback	▶ Select the Evaluation Administration Unit for which Evaluation has been performed. ▶ Select the Appraisal code for which evaluation feedback has to be entered. ▶ Select the self-employee code for which the feedback has to be recorded.
2	User records employee feedback.	HR Manager / Supervisor	Evaluation Administration	Record Employee Feedback	Record Employee Feedback	▶ Select the Employee acceptance as Accepted/Accepted with reservations/Not accepted. ▶ Save the details entered.

■   **Scenario 9 Details: Recording employee feedback for other than self.**

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
1	User records employee feedback.	HR Manager / Supervisor	Evaluation Administration	Record Employee Feedback	Record Employee Feedback	▶ Select the Evaluation Administration Unit for which Evaluation has been performed. ▶ Select the Appraisal code for which evaluation feedback has to be entered. ▶ Select the employee code for which the feedback has to be recorded.
2	User records employee feedback.	HR Manager / Supervisor	Evaluation Administration	Record Employee Feedback	Record Employee Feedback	▶ Enter the Date of Discussion, Employee feedback, Reporting Manager feedback. ▶ Save the details entered.

■   **Scenario 10 Details: Viewing the Performance History**

SL. #	FLOW OF EVENTS	PRIMARY ACTOR(S)	BUSINESS COMPONENT	ACTIVITY	PAGE	FUNCTIONAL STEPS
1	User Views Performance History	HR Manager / Supervisor	Evaluation Administration	View Performance History	Select employee to View Performance History	▶ Select the Evaluation Administration Unit ▶ Select the Appraisal code ▶ Search for the required employees.
2	User Views Performance History	HR Manager / Supervisor	Evaluation Administration	Record Employee Feedback	View Performance History	▶ Specify the Evaluator to view evaluation details