ERP - PROJECT

SUGAMYA

END USER DOCUMENT

FOR

HUMAN CAPITAL MANAGEMENT

PERFORMANCE MANAGEMENT SYSTEM

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1 DOCUMENT CONTROL

This is a controlled document and will be maintained on UJVNL portal.

Changes to this document will be recorded below and must be published to all interested parties.

1.1 DOCUMENT HISTORY

Version	Date	Author	VERSION DETAILS
V01	15.02.2018	Vinay Kumar	First ISSUE

1.2 DISTRIBUTION

Date	Name	Purpose

2 CREATE APPRAISAL DOCUMENT

2.1 PURPOSE

UJVN Process appraisals for employees annually from July to Jun month. There will be three phases of the appraisal process, within each phase of the cycle, we will create further sub stages (statuses and sub statuses) in the system to track the process and pending list of employees with the activity in the reports. As PMS Administrator creates appraisal forms during start of year, system will read controlling, reviewing and final authority from the organogram and maintain data in the forms automatically.

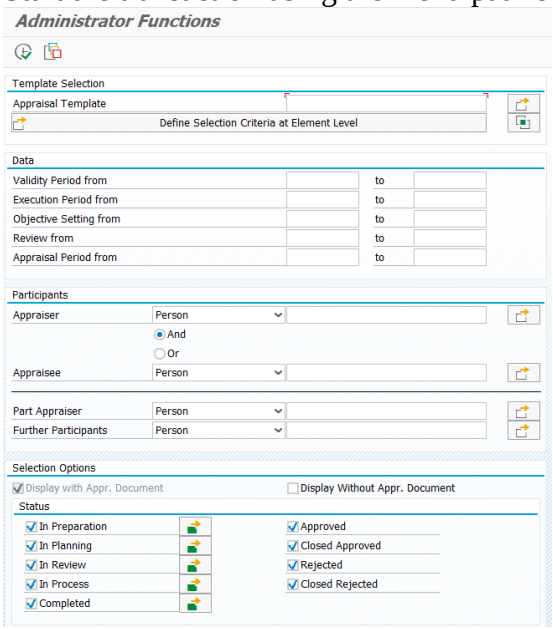
2.2 HELPFUL HINTS

- Press F1 for help
- Press F4 for getting input values
- R – Required
- O – Optional
- C – Conditional

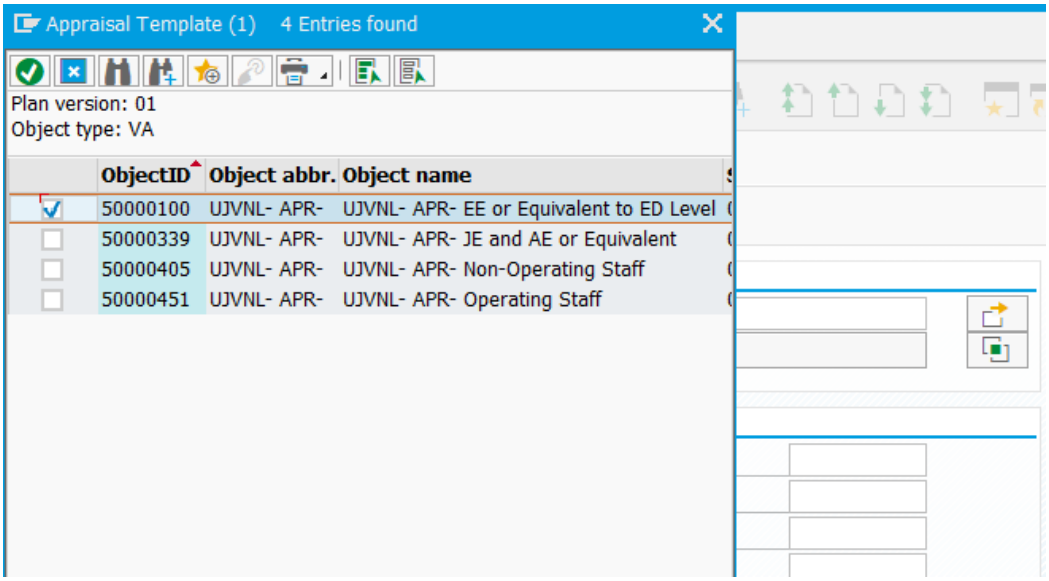
2.3 PROCEDURAL STEPS

Menu Path	ZHR_PMS-> Create Appraisal Document
Transaction Code	PHAP_ADMIN

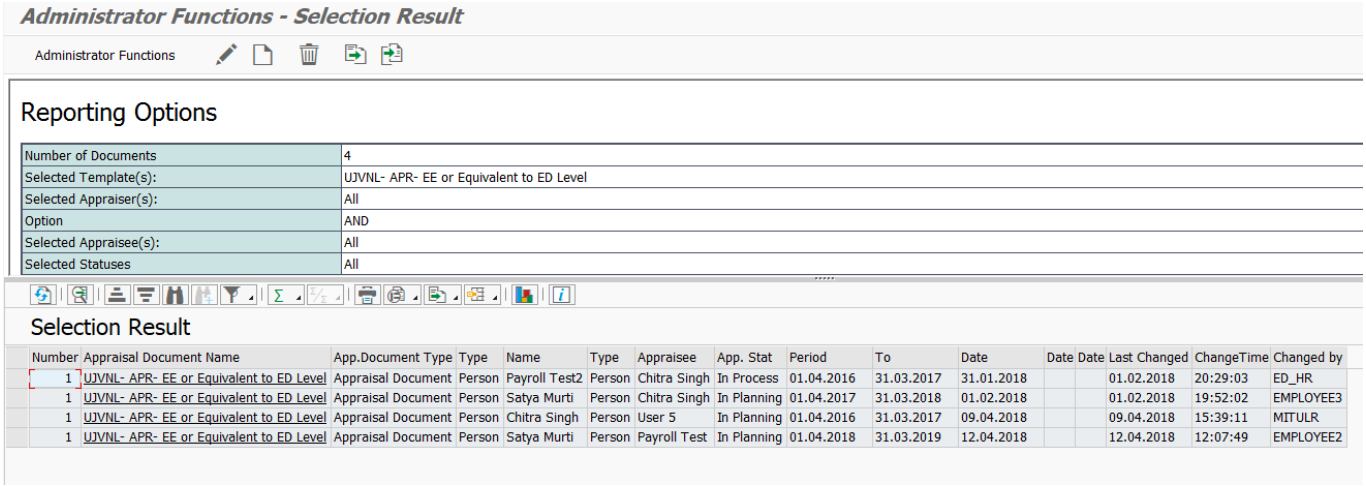
Start the transaction using the menu path or transaction code below screen will appear -



Select form from help as per the requirement -

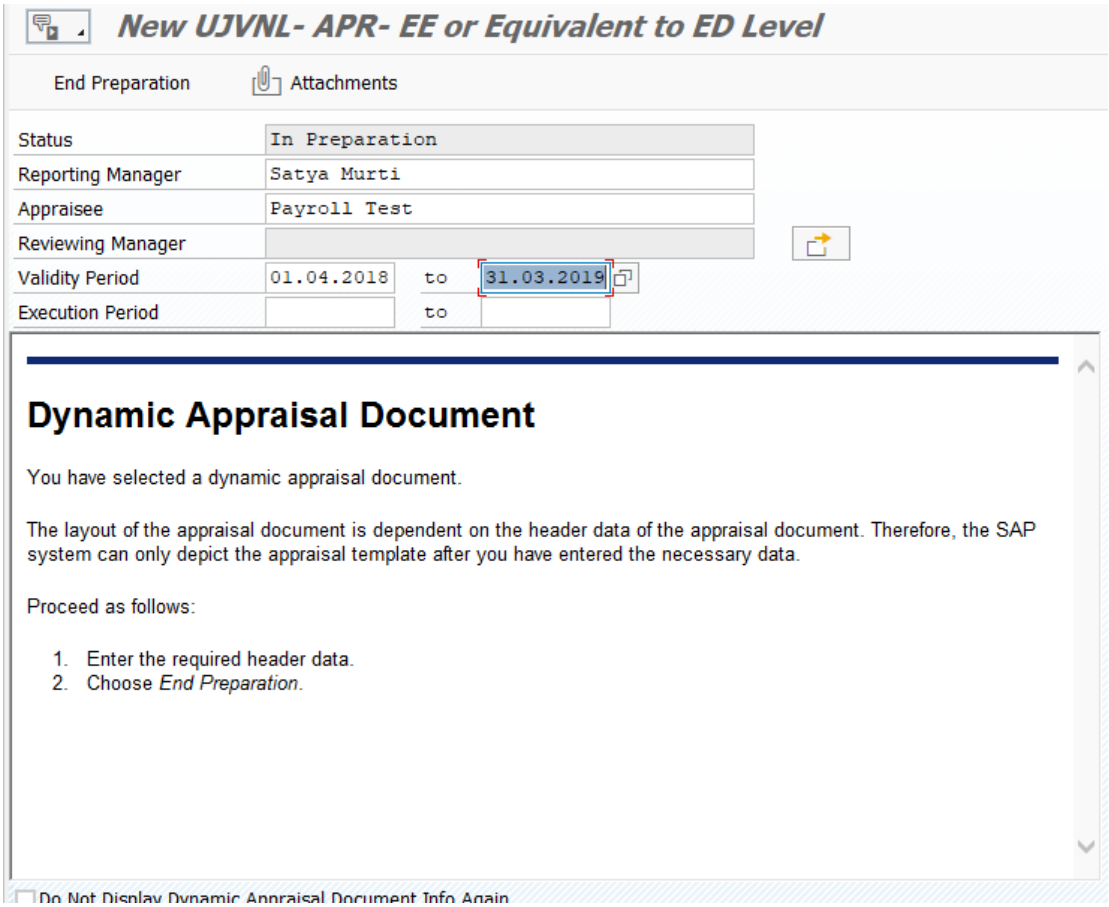


Below report will appear -

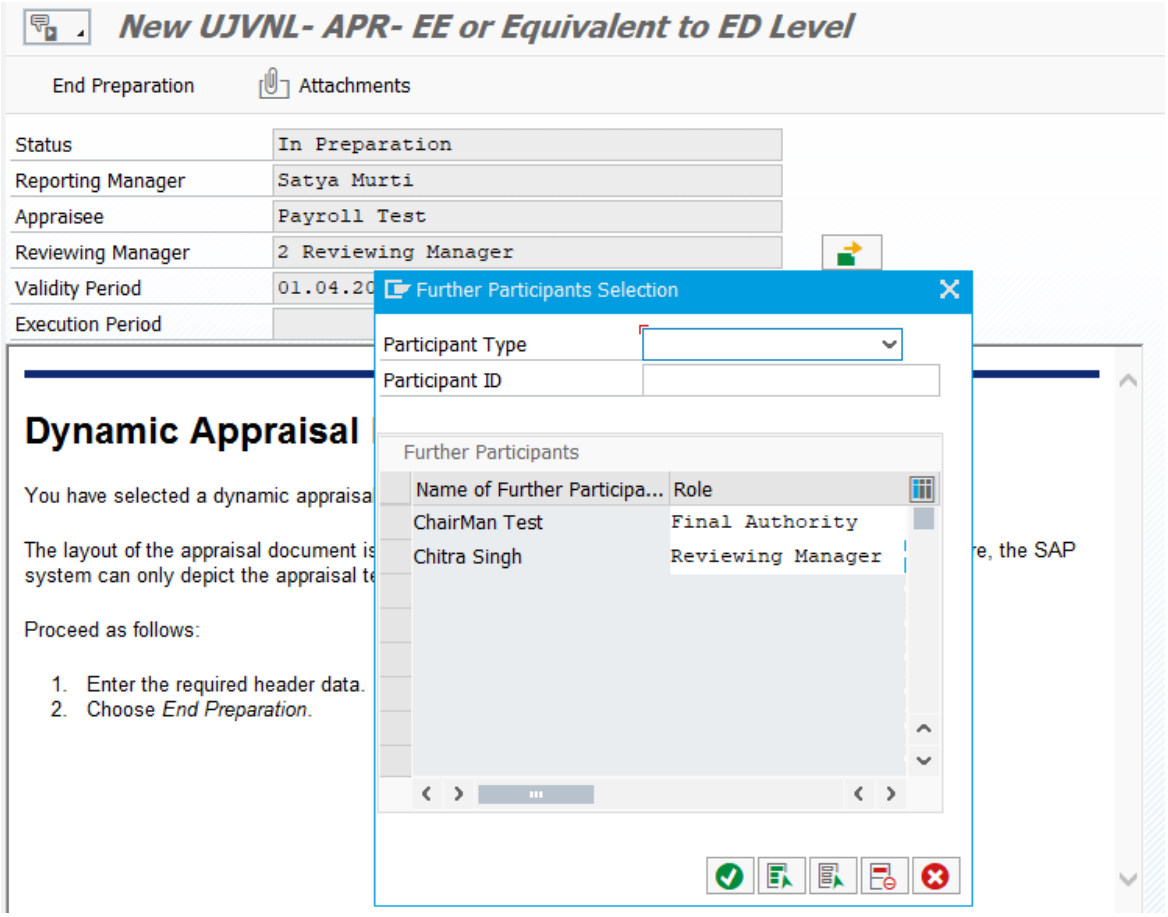


Click on create button to create appraisal document -

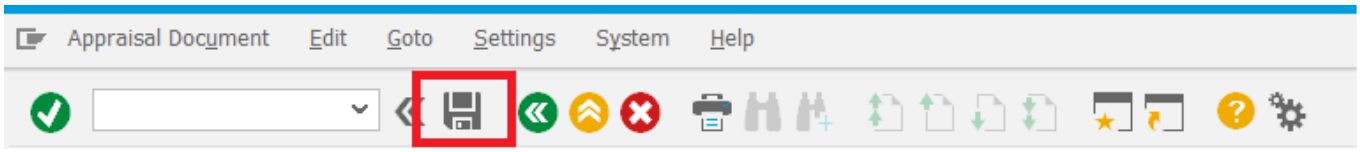
Enter Reporting Manager, Appraisee and appraisal period –



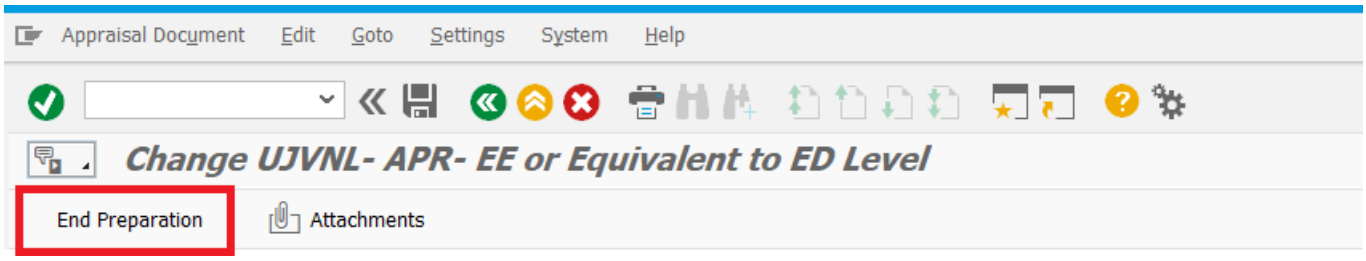
Enter Reviewing officer and final authority



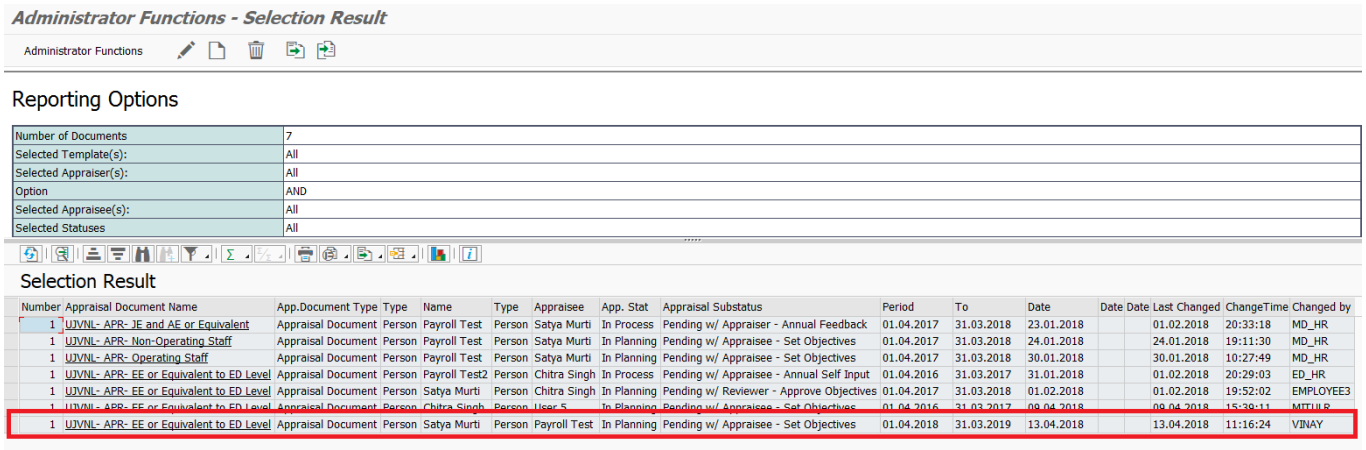
Click on save button to save the appraisal document -



Click on End Preparation button to release the document for employee objective setting -



Report will show the sub status as “In planning Pending w/ Appraisee – Set Objectives” –



Administrator Functions - Selection Result

Administrator Functions

Reporting Options

Number of Documents	7
Selected Template(s):	All
Selected Appraiser(s):	All
Option	AND
Selected Appraisee(s):	All
Selected Statuses	All

Selection Result

Number	Appraisal Document Name	App.Document Type	Type	Name	Type	Appraisee	App. Stat	Appraisal Substatus	Period	To	Date	Date	Date	Last Changed	ChangeTime	Changed by
1	UJVNL- APR- JE and AE or Equivalent	Appraisal Document	Person	Payroll Test	Person	Satya Murti	In Process	Pending w/ Appraiser - Annual Feedback	01.04.2017	31.03.2018	23.01.2018			01.02.2018	20:33:18	MD_HR
1	UJVNL- APR- Non-Operating Staff	Appraisal Document	Person	Payroll Test	Person	Satya Murti	In Planning	Pending w/ Appraisee - Set Objectives	01.04.2017	31.03.2018	24.01.2018			24.01.2018	19:11:30	MD_HR
1	UJVNL- APR- Operating Staff	Appraisal Document	Person	Payroll Test	Person	Satya Murti	In Planning	Pending w/ Appraisee - Set Objectives	01.04.2017	31.03.2018	30.01.2018			30.01.2018	10:27:49	MD_HR
1	UJVNL- APR- EE or Equivalent to ED Level	Appraisal Document	Person	Payroll Test2	Person	Chitra Singh	In Process	Pending w/ Appraisee - Annual Self Input	01.04.2016	31.03.2017	31.01.2018			01.02.2018	20:29:03	ED_HR
1	UJVNL- APR- EE or Equivalent to ED Level	Appraisal Document	Person	Satya Murti	Person	Chitra Singh	In Planning	Pending w/ Reviewer - Approve Objectives	01.04.2017	31.03.2018	01.02.2018			01.02.2018	19:52:02	EMPLOYEE3
1	UJVNL- APR- EE or Equivalent to ED Level	Appraisal Document	Person	Chitra Singh	Person	User 5	In Planning	Pending w/ Appraisee - Set Objectives	01.04.2016	31.03.2017	09.04.2018			09.04.2018	15:39:11	MITULR
1	UJVNL- APR- EE or Equivalent to ED Level	Appraisal Document	Person	Satya Murti	Person	Payroll Test	In Planning	Pending w/ Appraisee - Set Objectives	01.04.2018	31.03.2019	13.04.2018			13.04.2018	11:16:24	VINAY

2.4 RESULT

Appraisal document is released for objective setting for employee.

2.5 COMMENTS

None.

3 SUBMIT OBJECTIVES

3.1 PURPOSE

This process allows employees to set objective for their Annual workplan.

3.2 HELPFUL HINTS

- Press F1 for help
- Press F4 for getting input values
- R – Required
- O – Optional
- C – Conditional

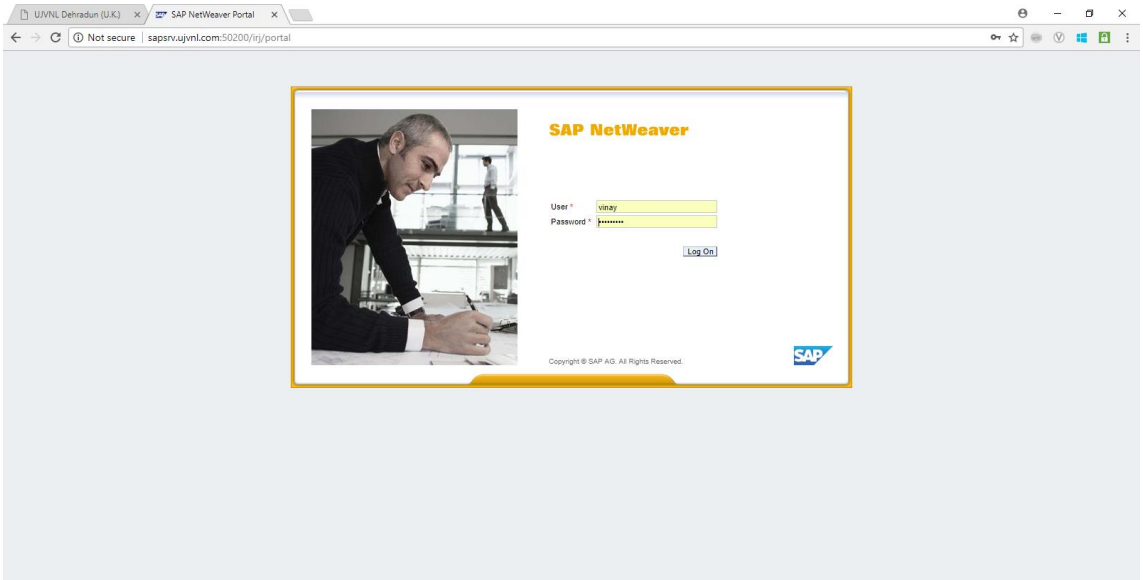
3.3 PROCEDURAL STEPS

Menu Path	Employee Self Service - > Career Development - > Appraisal Documents
Transaction Code	NA

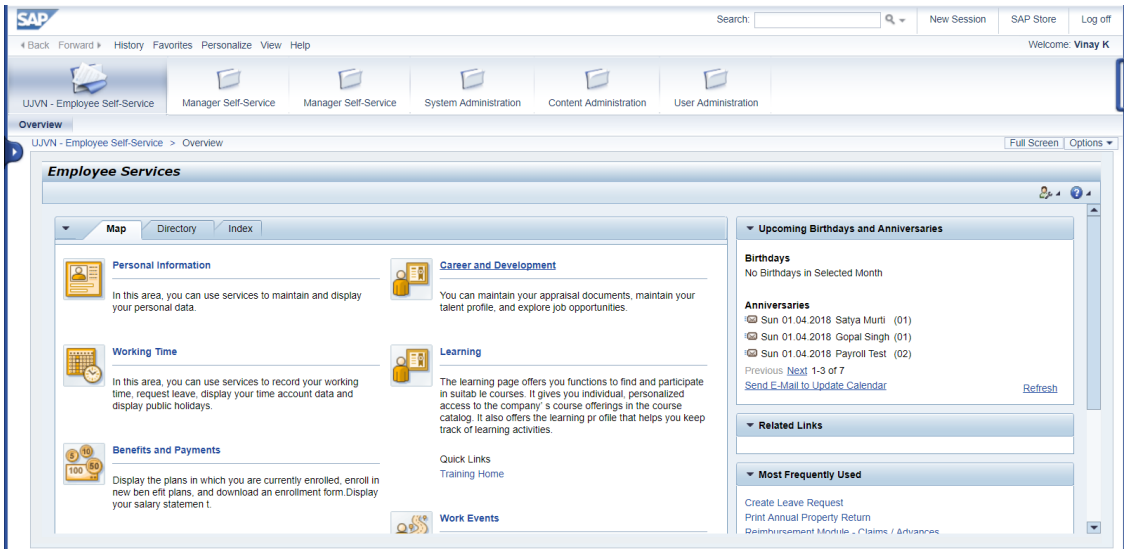
LOGON TO PORTAL:

The Employee should follow the steps below to enter into portal

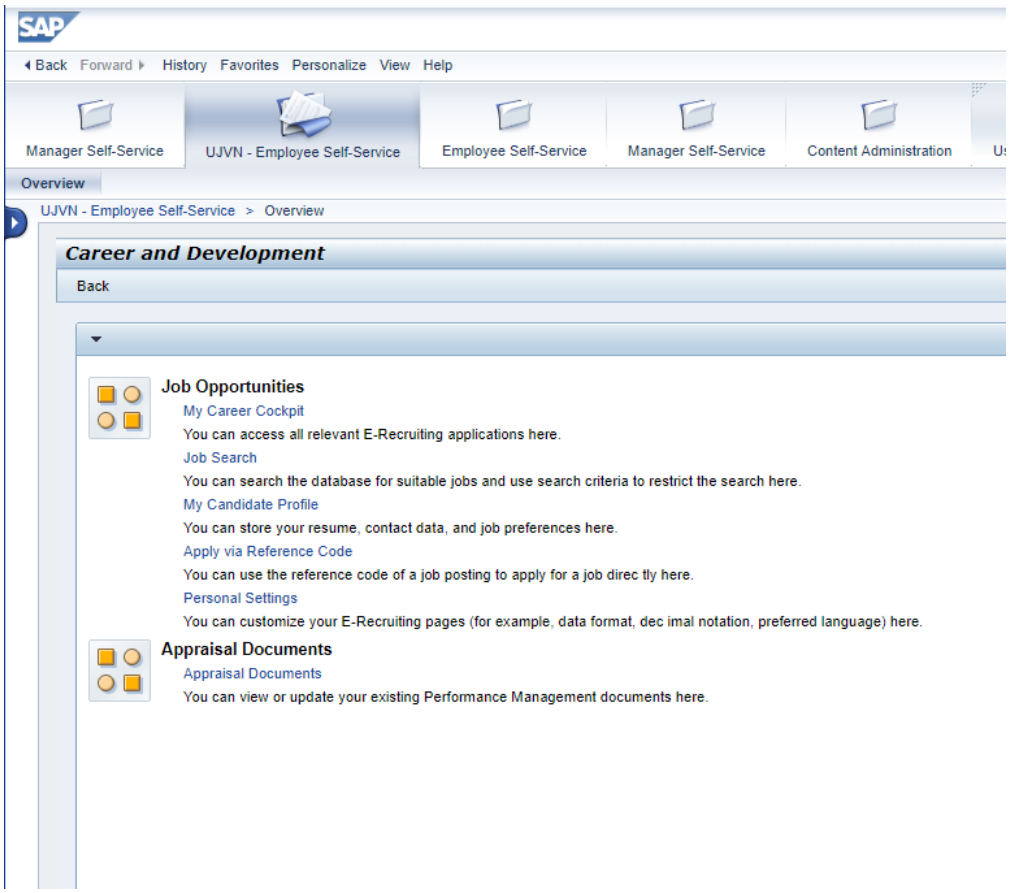
- Select internet explorer icon and double click on it.
- Enter the site address http://sapsrv.ujvnl.com:50200/irj/portal, the system will display the screen as follows:



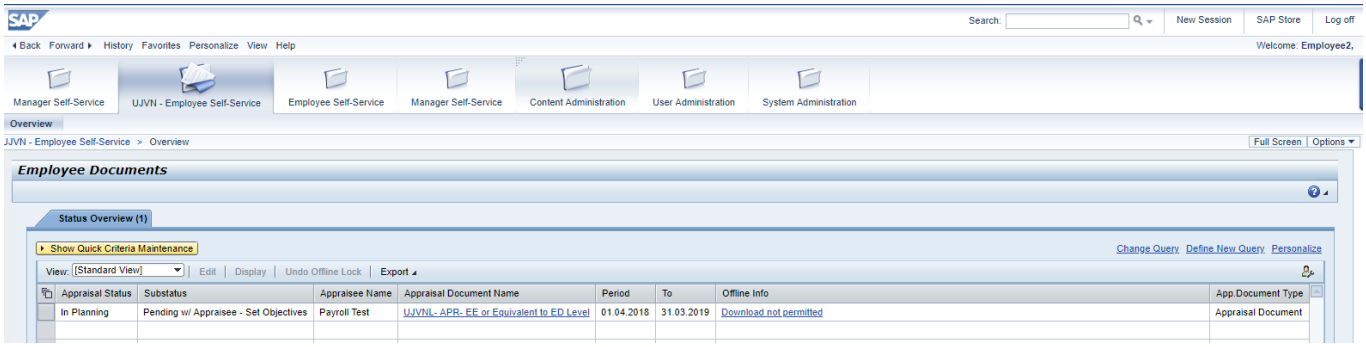
- Enter the EP user ID given (Ex: vinay), password and click on Log On Icon.
- Now system will take you to the home page of your Portal as shown below.



Click on Career and Development –

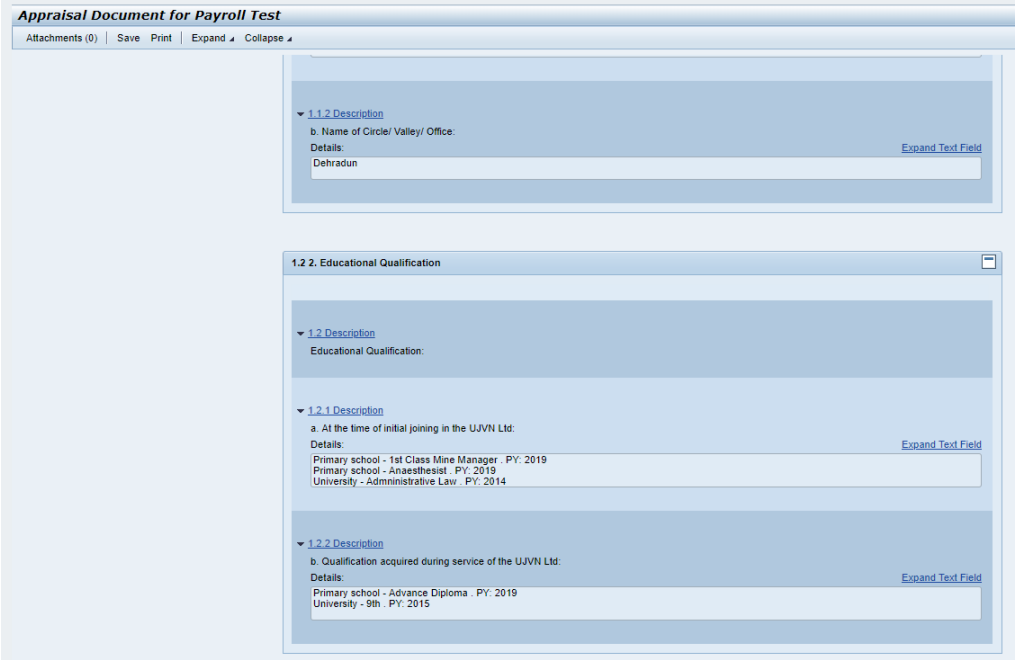


Click on Appraisal Document, below screen will appear –



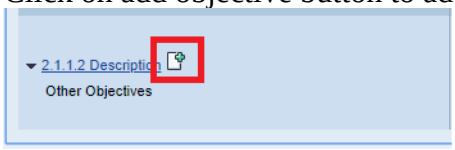
Click on Appraisal document name to submit the objectives -

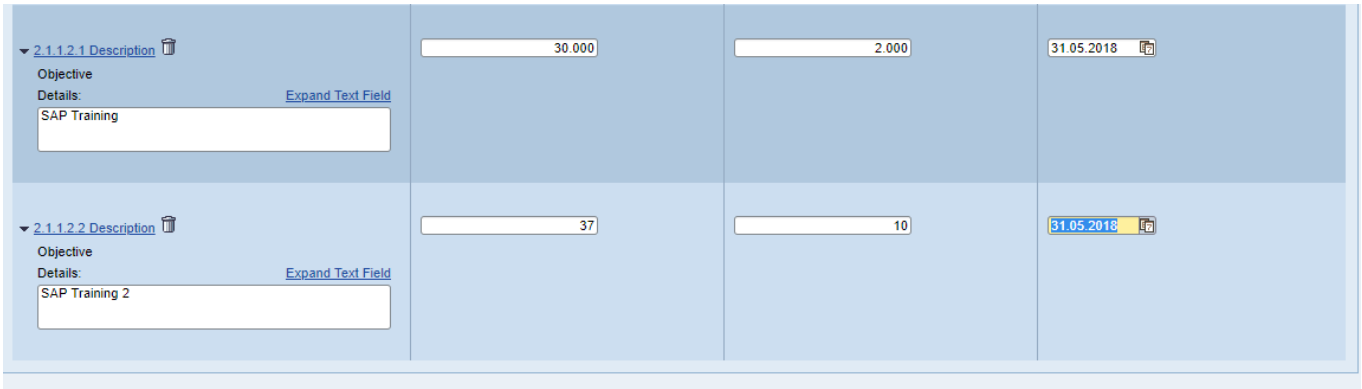
Section – I details –



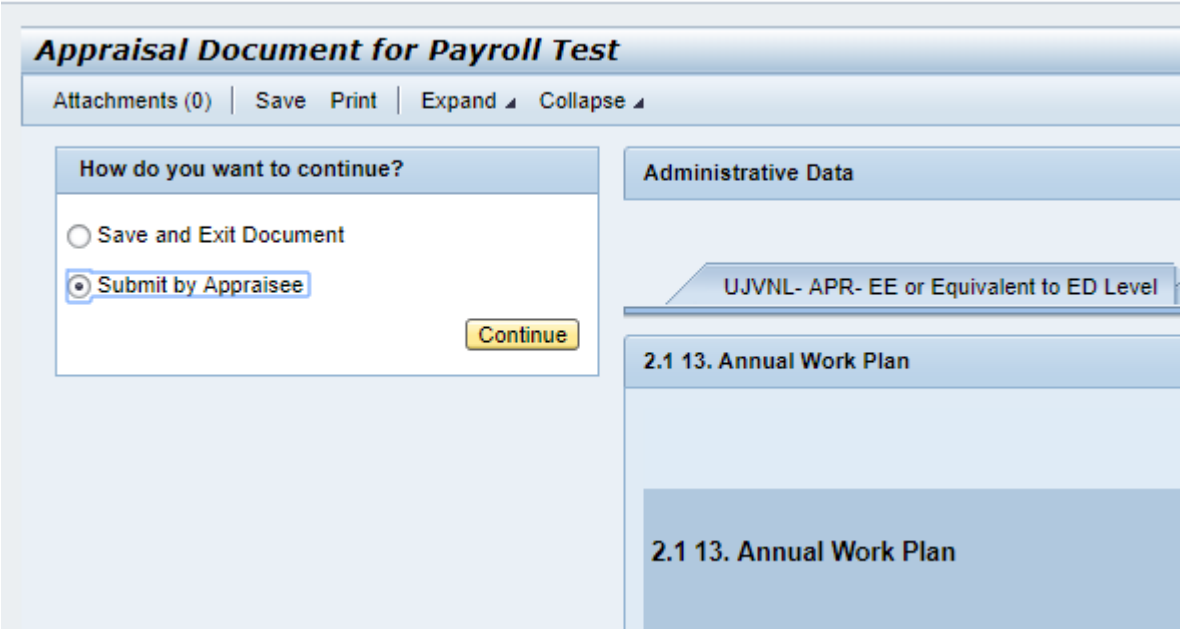
Create Annual Workplan –

Click on add objective button to add new objective –



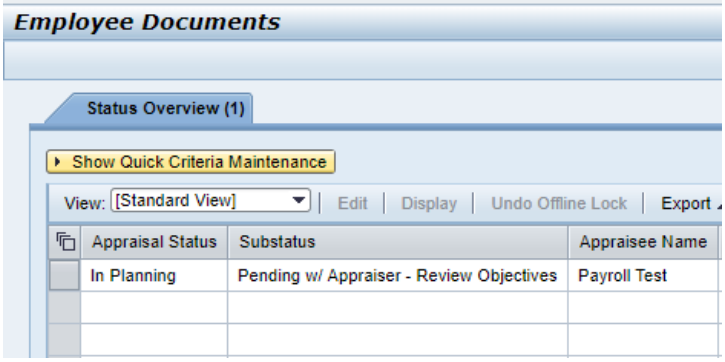


Click on Submit by apraisee and click on continue –



3.4 RESULT

Objective submitted and status set to Pending with appraiser –



3.5 COMMENTS

None.

4 REVIEW OBJECTIVES

4.1 PURPOSE

4.2 HELPFUL HINTS

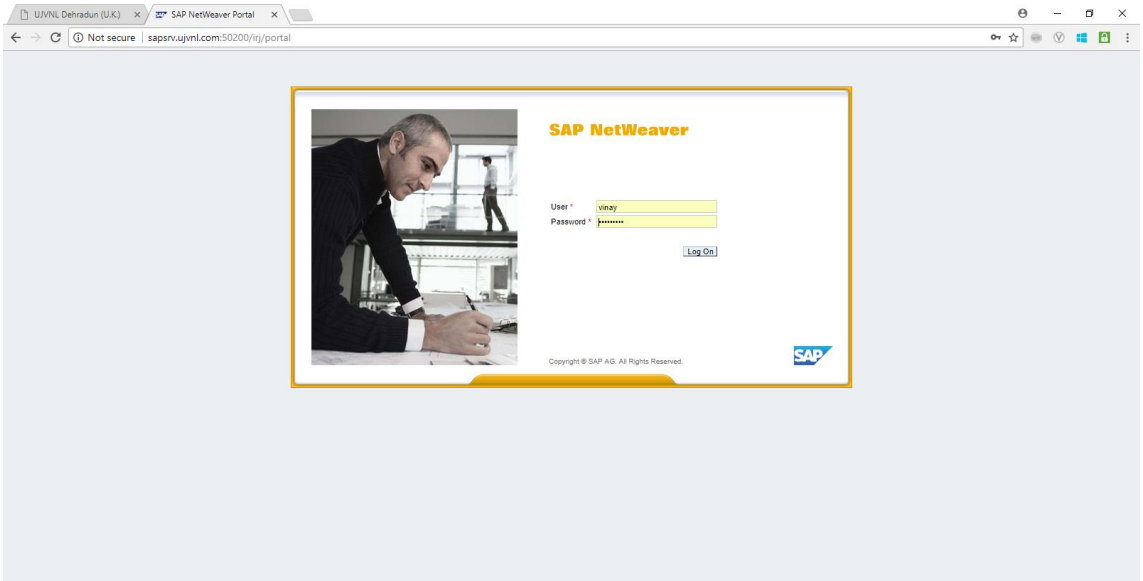
- Press F1 for help
- Press F4 for getting input values
- R – Required
- O – Optional
- C – Conditional

4.3 PROCEDURAL STEPS

LOGON TO PORTAL:

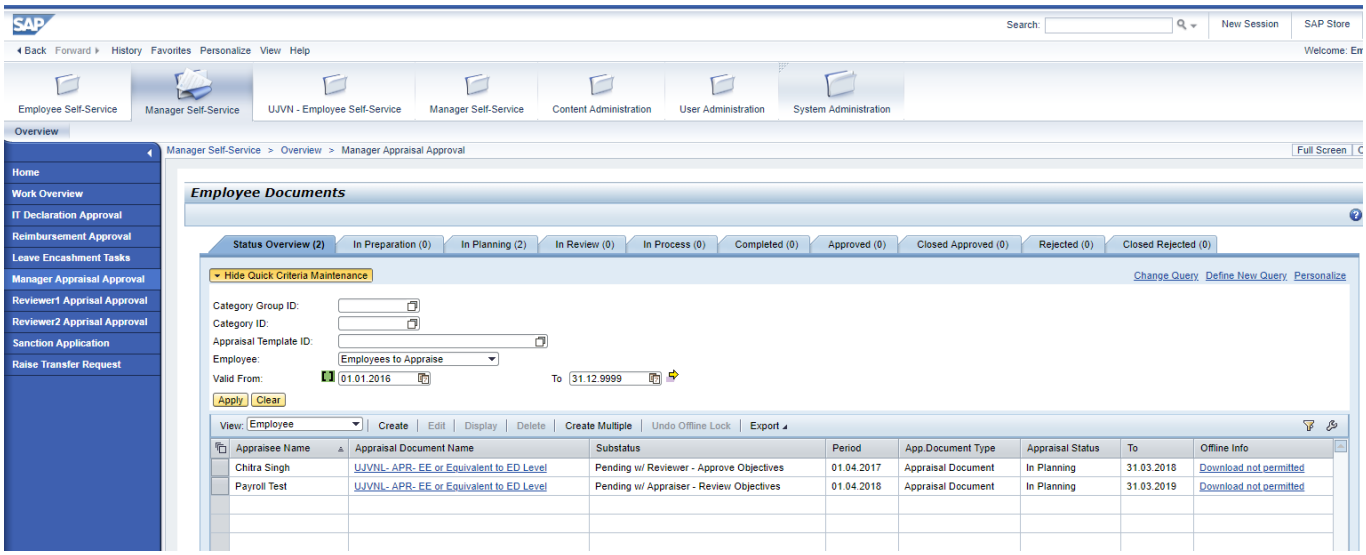
The Employee should follow the steps below to enter portal

- Select internet explorer icon and double click on it.
- Enter the site address http://sapsrv.ujvnl.com:50200/irj/portal, the system will display the screen as follows:

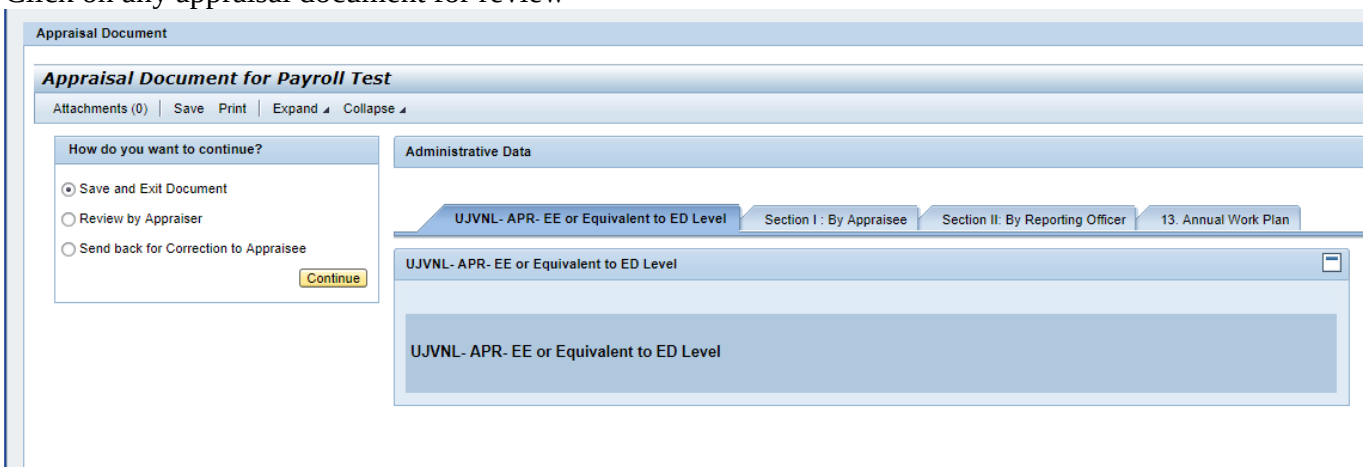


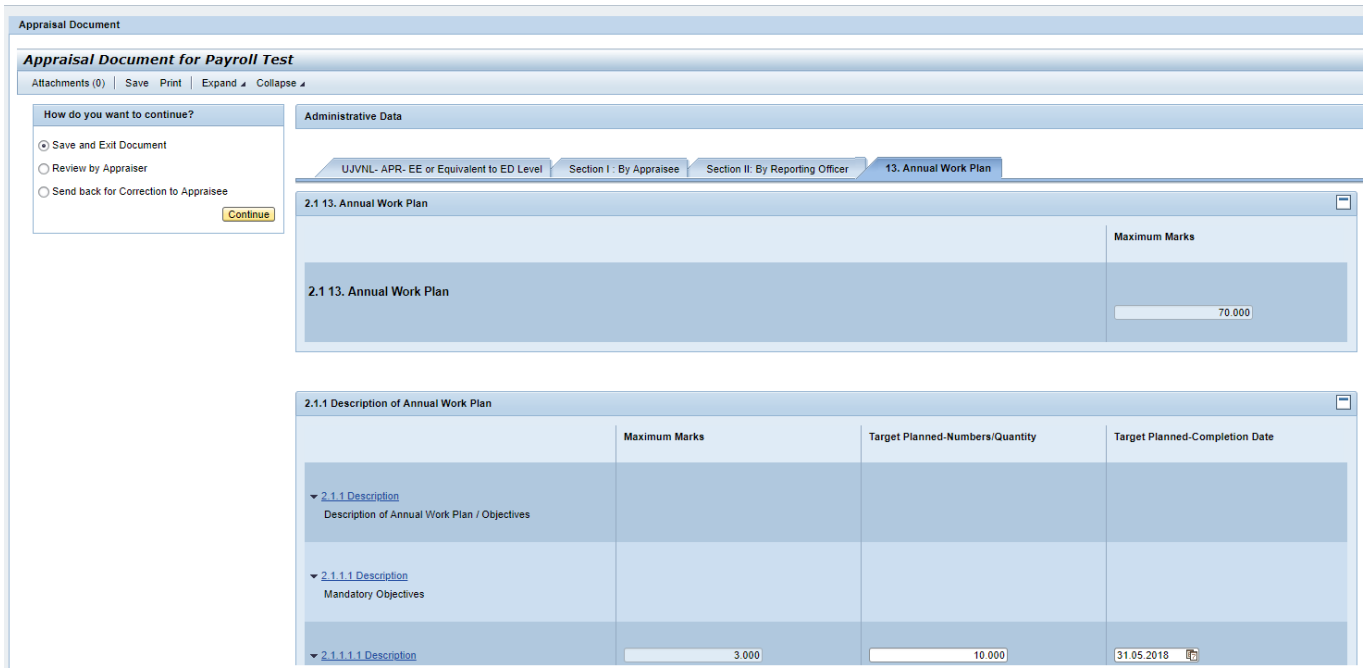
- Enter the EP user ID given (Ex: employee3), password and click on Log On Icon.
- Now system will take you to the home page of your Portal as shown below.

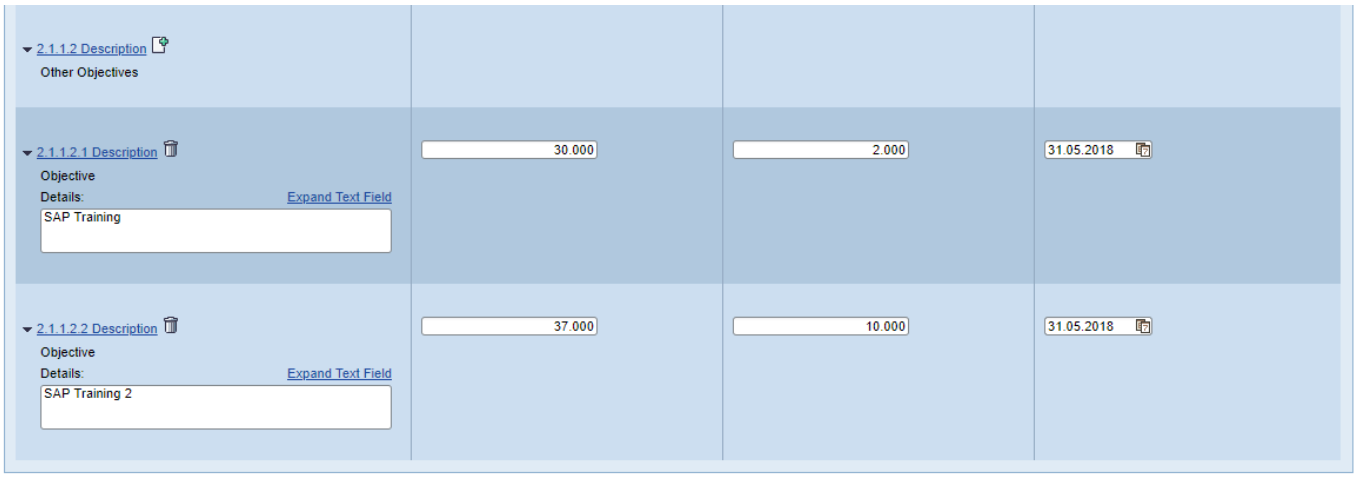
Click on Manager Self-Service and Manager Appraisal Approval, below screen will appear –



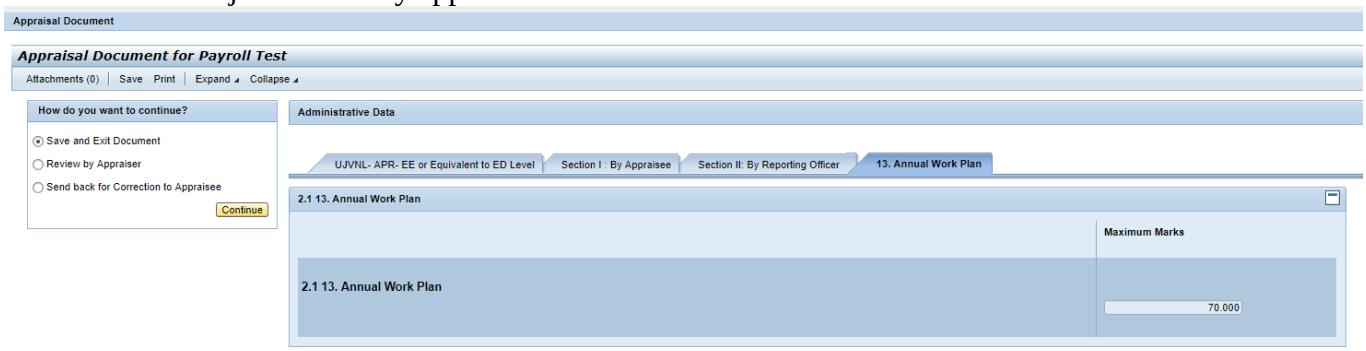
System will show all the pending appraisal document to be reviewed -
Click on any appraisal document for review –





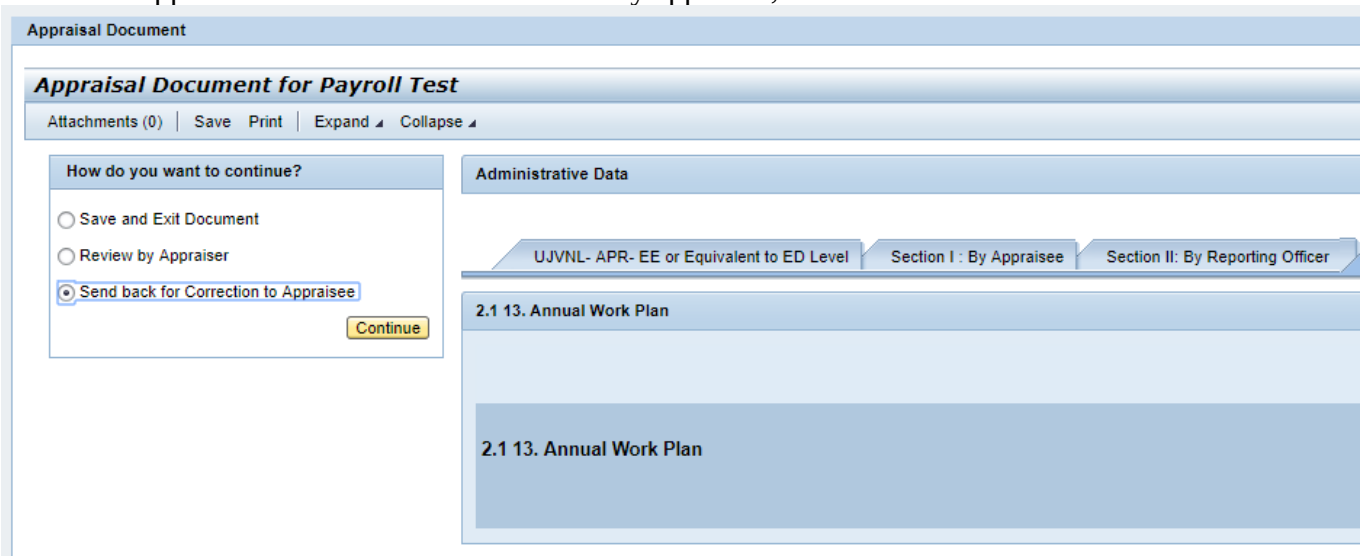


Review all the objectives set by appraisee –



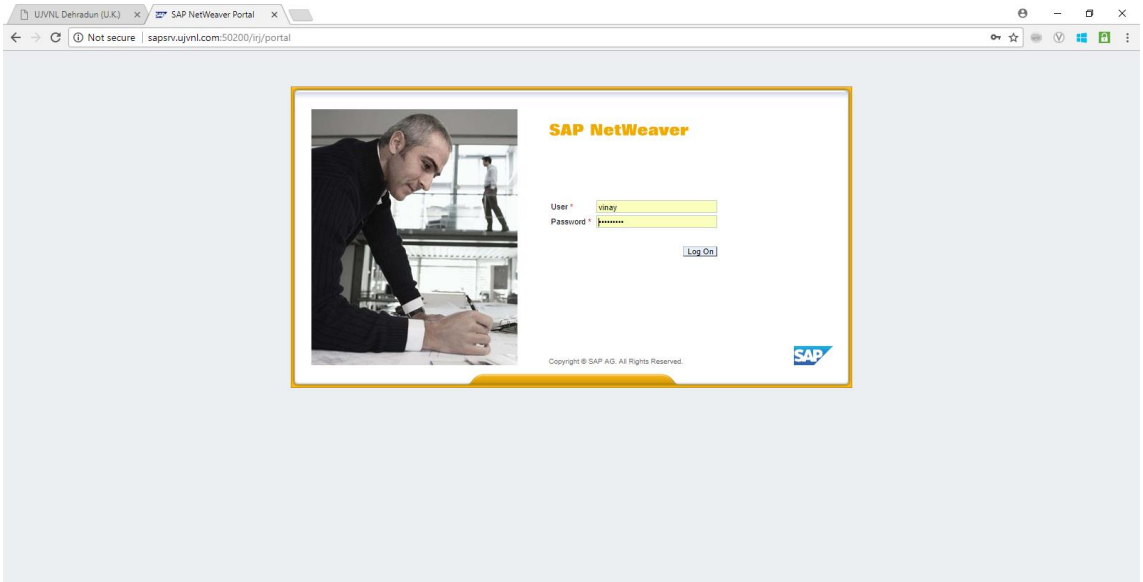
Appraiser can send back the appraisal documen for any modification,if required.

To review appraisal document click on Review by appraiser, and click on continue –



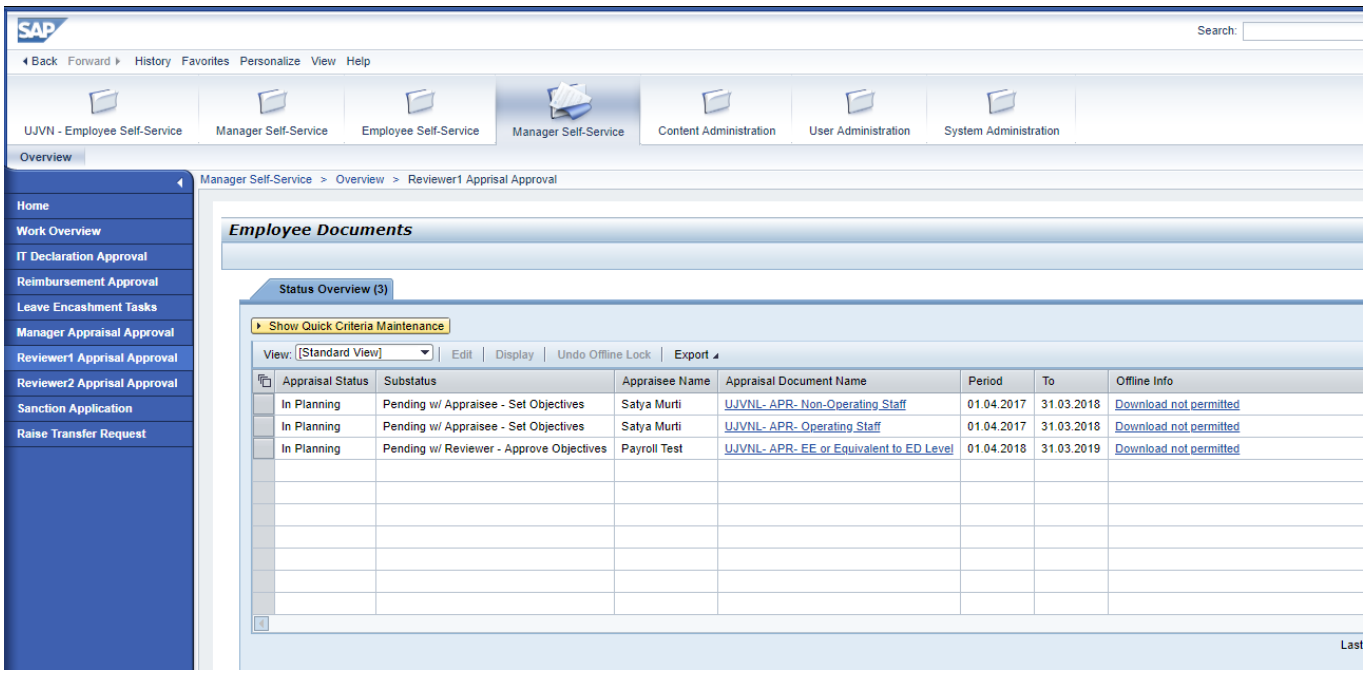
The Employee should follow the steps below to enter portal

- Select internet explorer icon and double click on it.
- Enter the site address http://sapsrv.ujvnl.com:50200/irj/portal, the system will display the screen as follows:

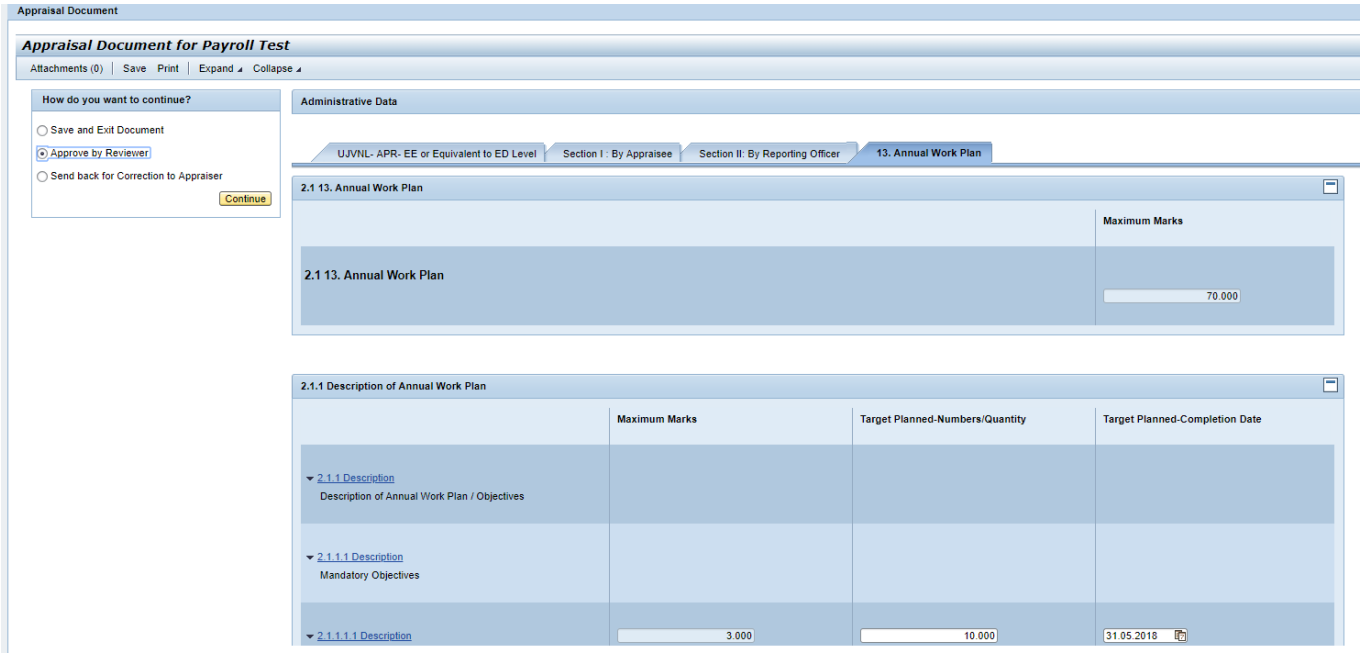


- Enter the EP user ID given (Ex: employee3), password and click on Log On Icon.
- Now system will take you to the home page of your Portal as shown below.

Click on Manager Self-Service and Reviewer1 Appraisal Approval to approve the objective set by appraisee, below screen will appear. Select the appraisal document to approve the objectives –



C



Click on Approve by Reviewer.

4.4 RESULT

Appraisal document is successfully reviewed by the appraiser and forwarded for reviewer. Objective set by appraisee is approved by the Reporting officer and the Reviewing authority.

4.5 COMMENTS

None.

5 CHANGE APPRAISAL DOCUMENT STATUS

5.1 PURPOSE

This process is used to change the status for appraisal document for various status.

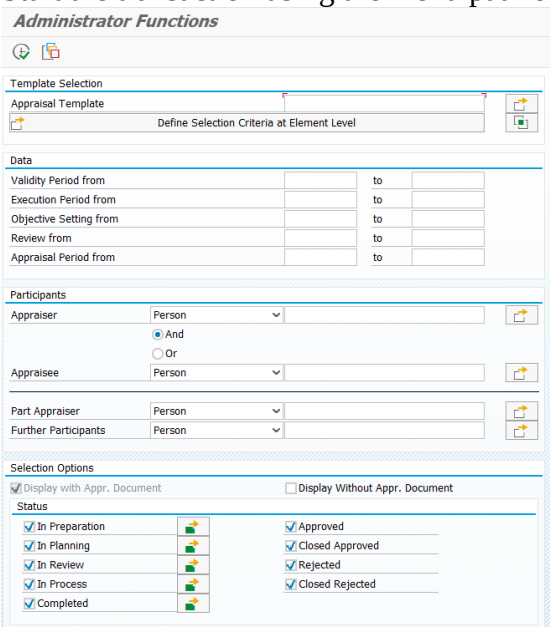
5.2 HELPFUL HINTS

- Press F1 for help
- Press F4 for getting input values
- R – Required
- O – Optional
- C – Conditional

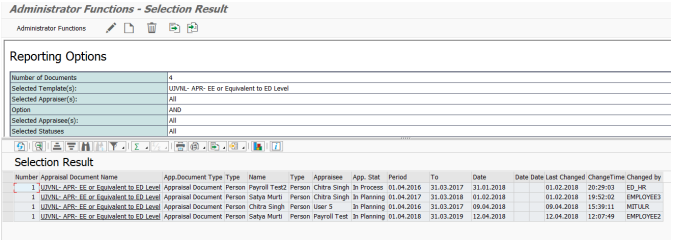
5.3 PROCEDURAL STEPS

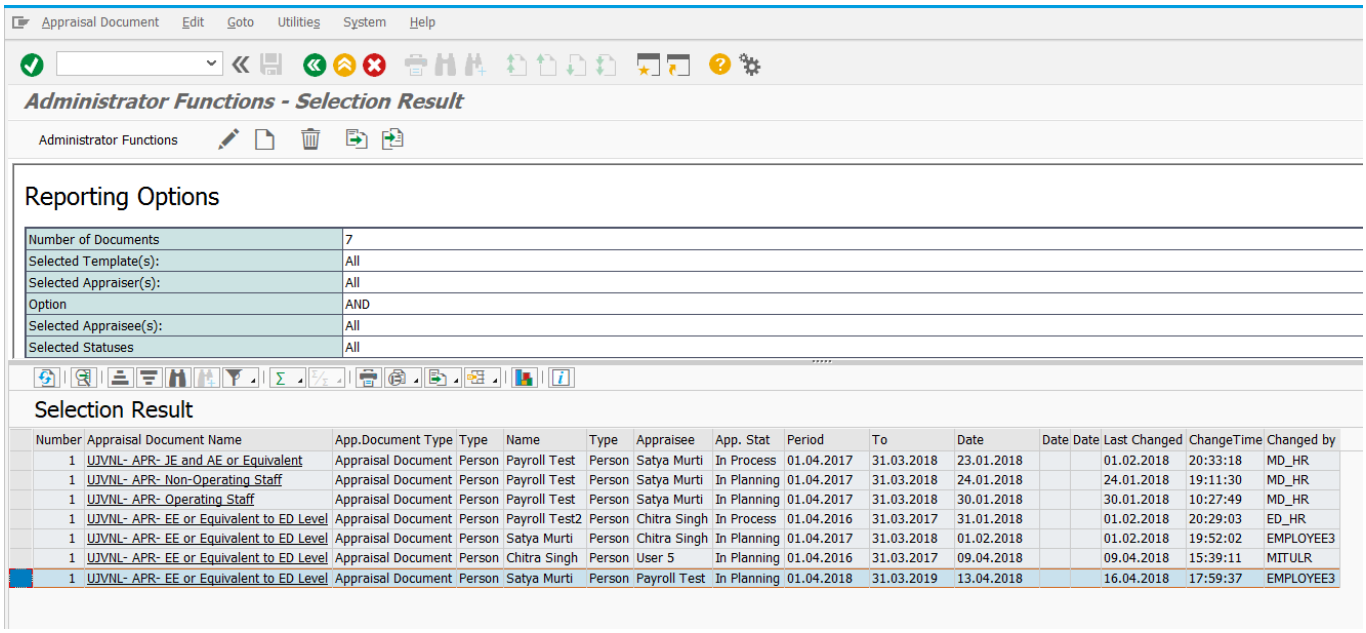
Menu Path	Phap_admin
Transaction Code	Phap_admin

Start the transaction using the menu path or transaction code below screen will appear -

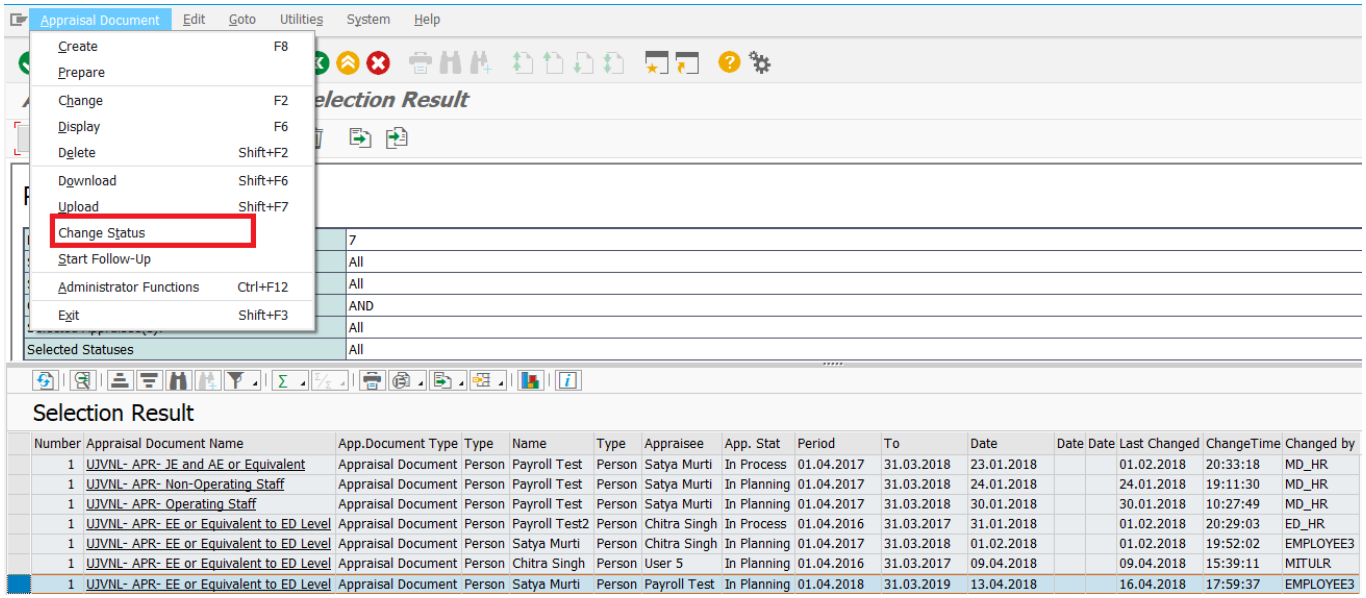


Below report will appear -

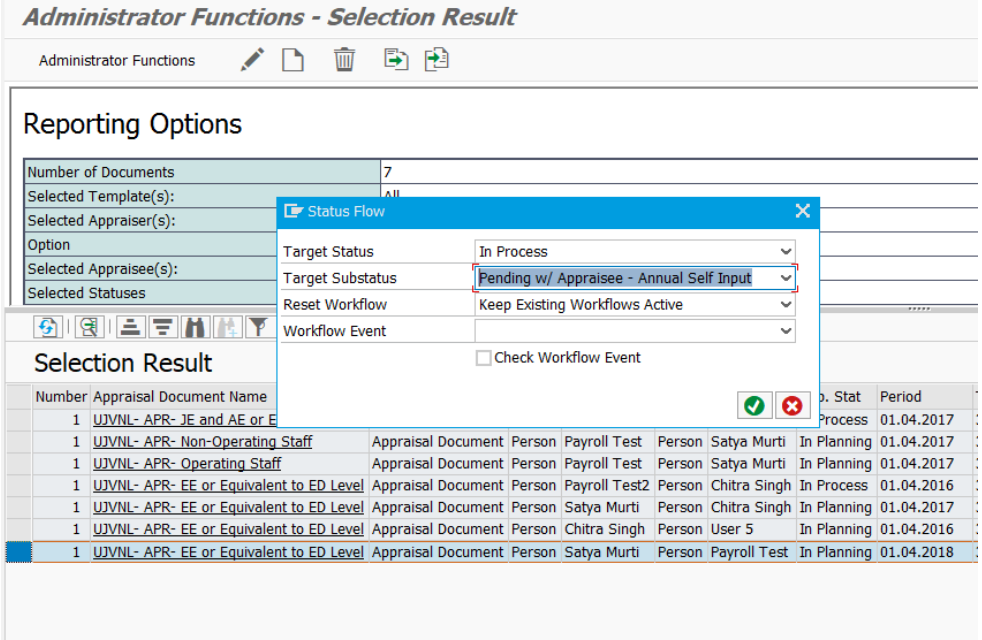




Select the appraisal document, and click on appraisal doument from the top menu bar



Click on change status and Select the status as shown below –



5.4 RESULT

Status updated as Pending with Appraisee for Annual Self input submission.

5.5 COMMENTS

None.

6 SUBMIT SELF INPUTS

6.1 PURPOSE

6.2 HELPFUL HINTS

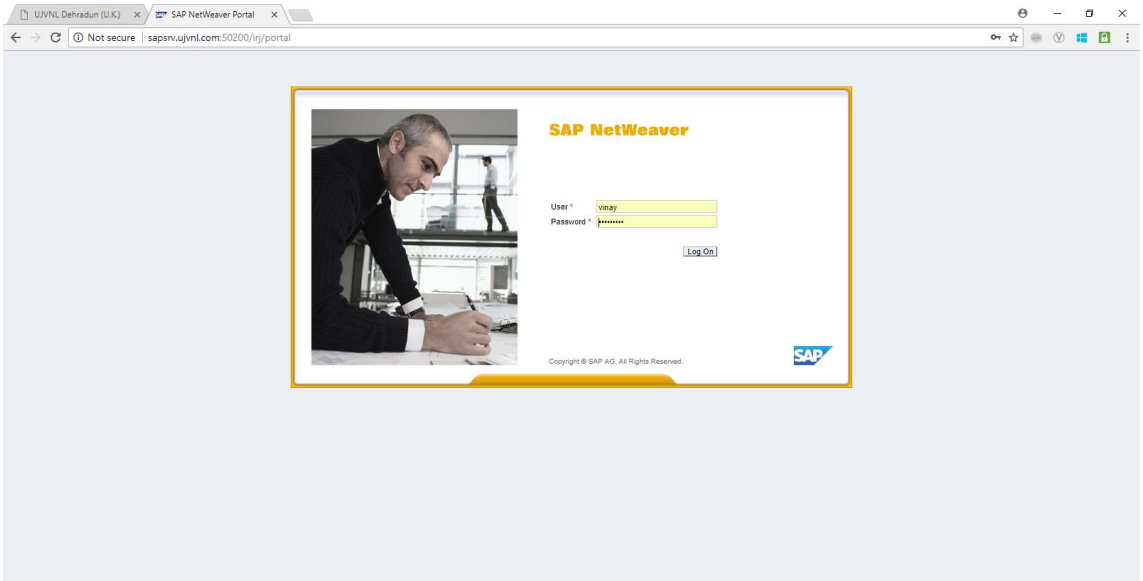
- Press F1 for help
- Press F4 for getting input values
- R – Required
- O – Optional
- C – Conditional

6.3 PROCEDURAL STEPS

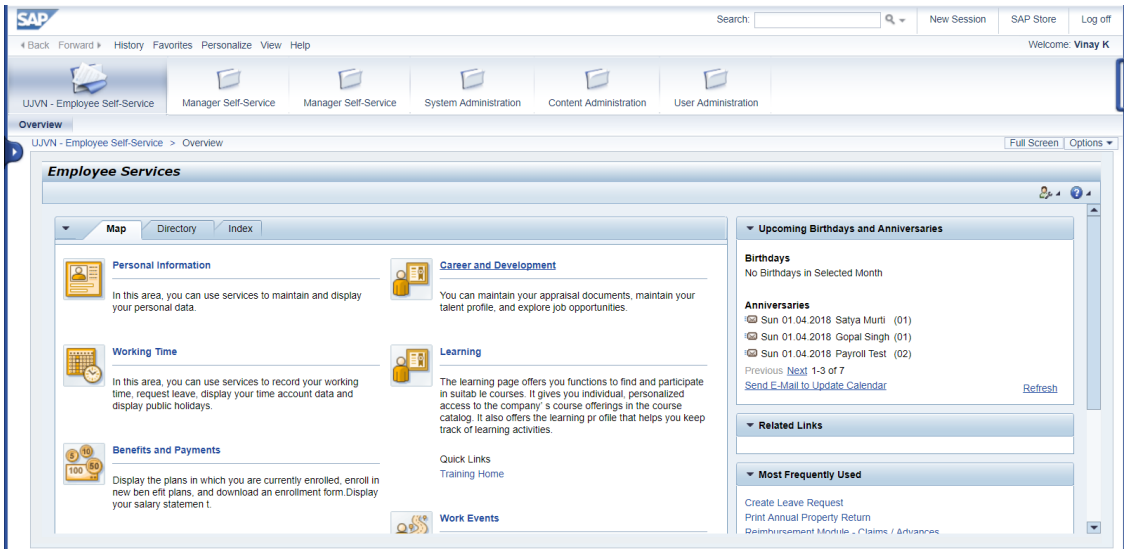
LOGON TO PORTAL:

The Employee should follow the steps below to enter into portal

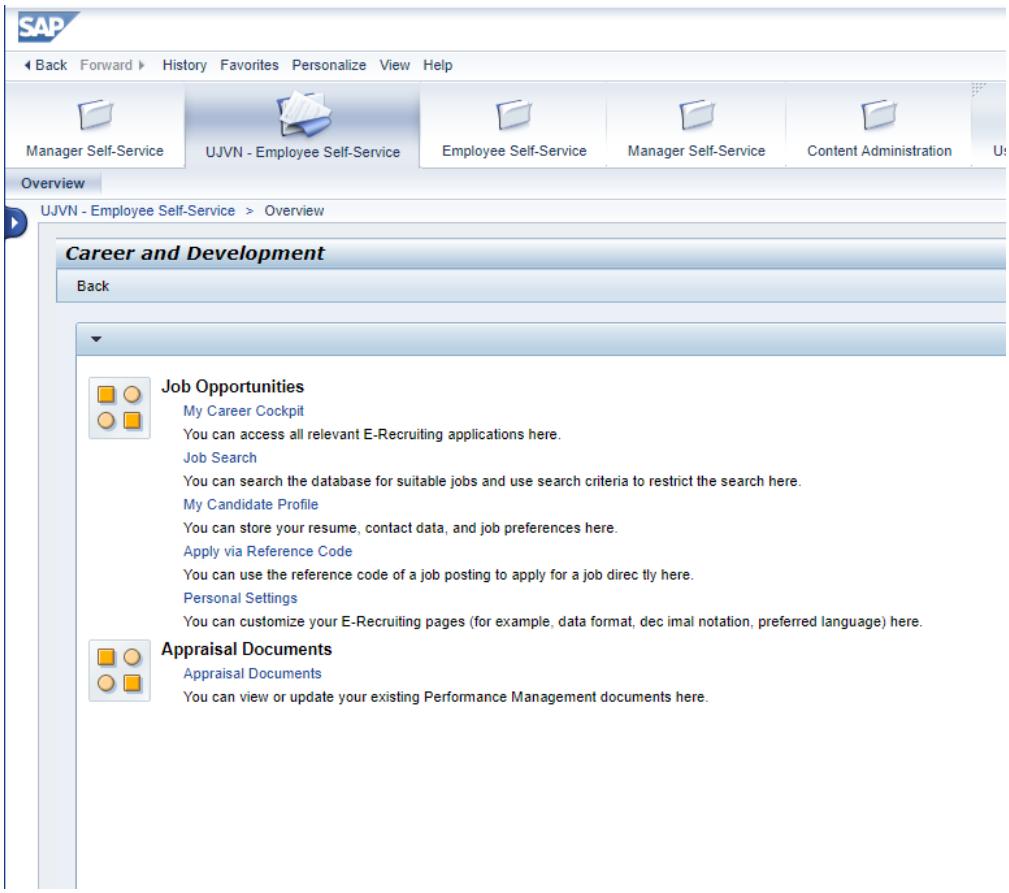
- Select internet explorer icon and double click on it.
- Enter the site address http://sapsrv.ujvnl.com:50200/irj/portal, the system will display the screen as follows:



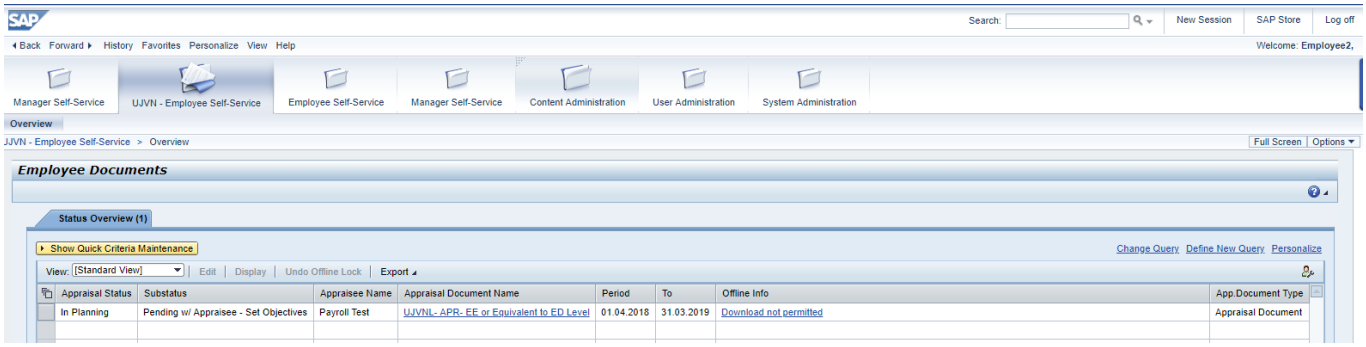
- Enter the EP user ID given (Ex: vinay), password and click on Log On Icon.
- Now system will take you to the home page of your Portal as shown below.



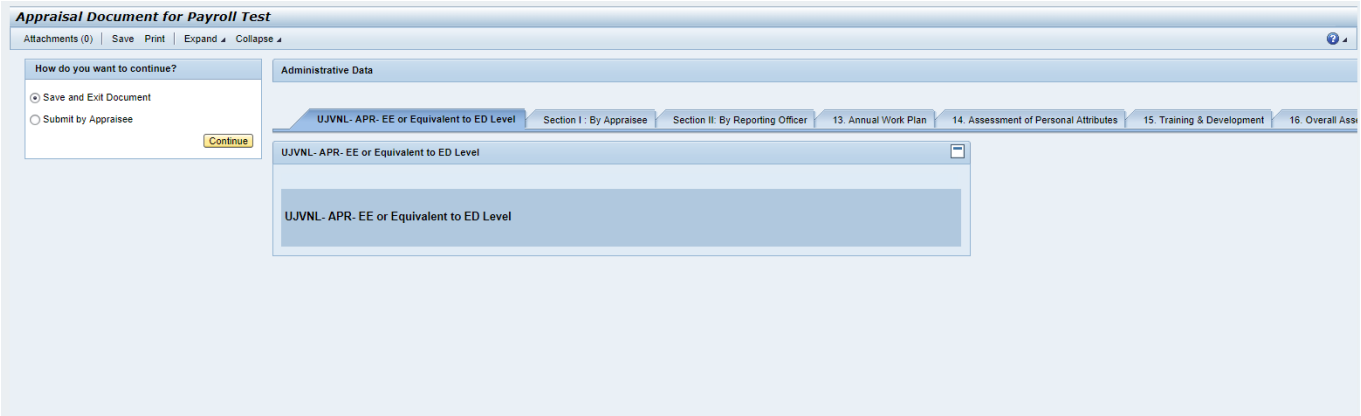
Click on Career and Development –

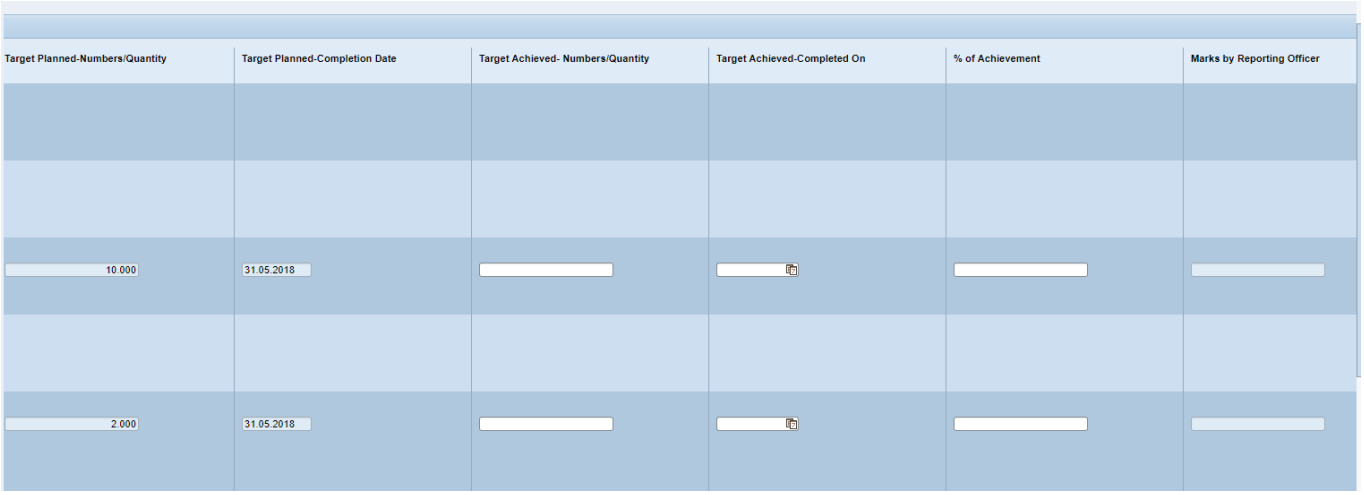


Click on Appraisal Document, below screen will appear –

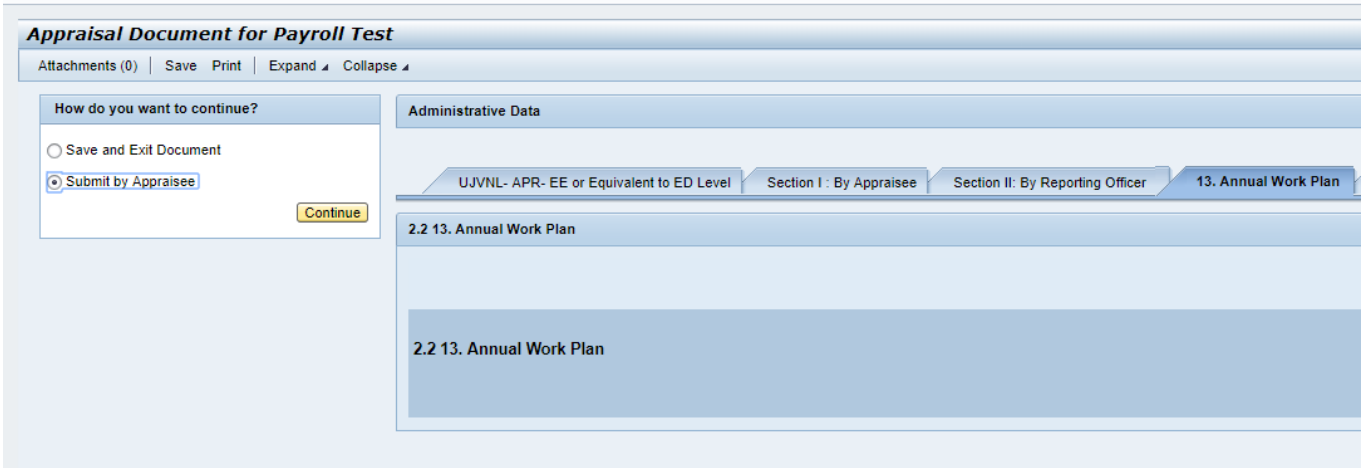


Click on Appraisal document name to submit the Self Input -





Enter the Self input against all the objective set.



Press on Continue.

6.4 RESULT

Self-input submitted by the Appraisal document.

6.5 COMMENTS

None.

7 REVIEW SELF INPUTS

7.1 PURPOSE

7.2 HELPFUL HINTS

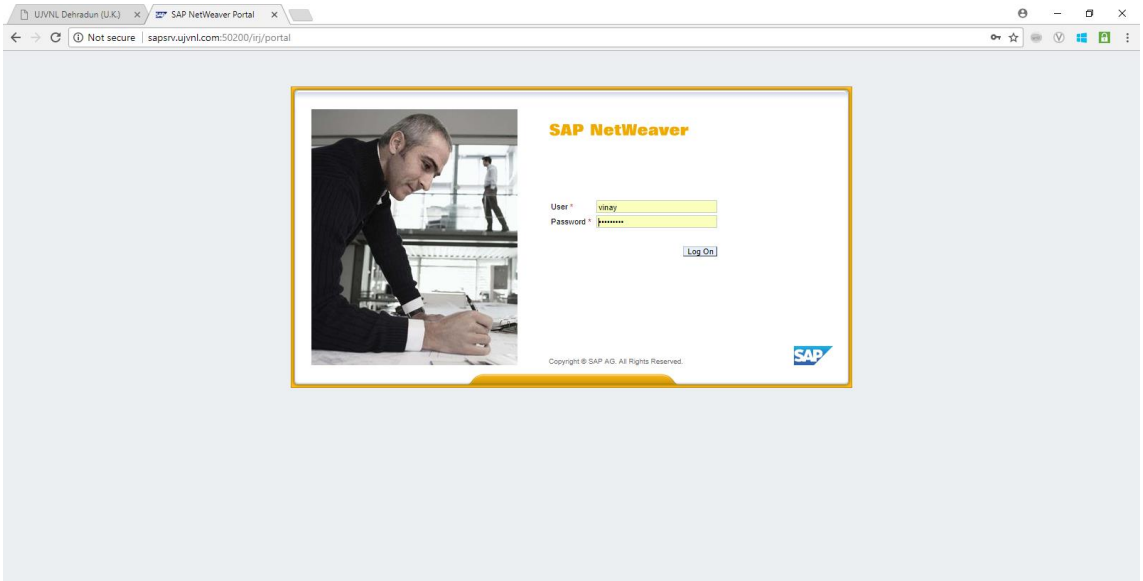
- Press F1 for help
- Press F4 for getting input values
- R – Required
- O – Optional
- C – Conditional

7.3 PROCEDURAL STEPS

LOGON TO PORTAL:

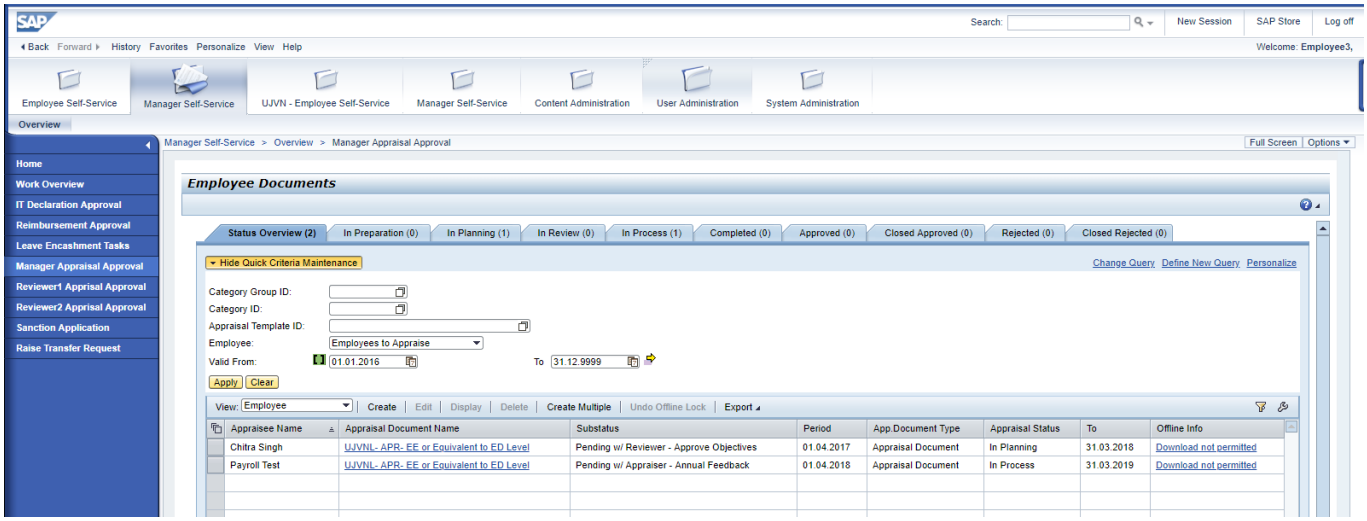
The Employee should follow the steps below to enter portal

- Select internet explorer icon and double click on it.
- Enter the site address http://sapsrv.ujvnl.com:50200/irj/portal, the system will display the screen as follows:

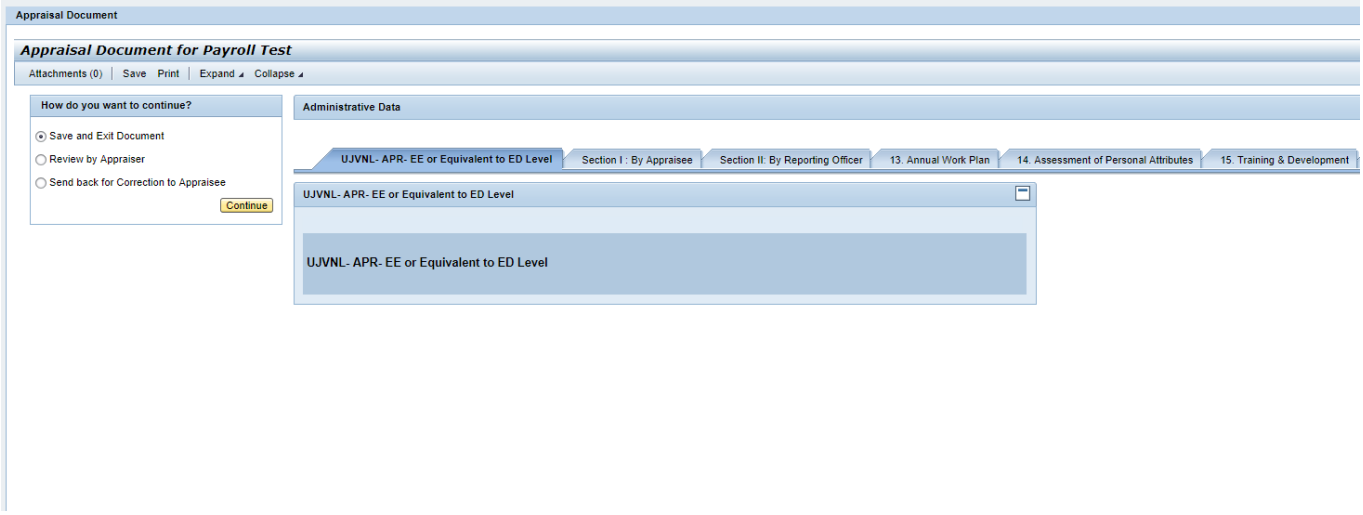


- Enter the EP user ID given (Ex: employee3), password and click on Log On Icon.
- Now system will take you to the home page of your Portal as shown below.

Click on Manager Self-Service and Manager Appraisal Approval, below screen will appear –



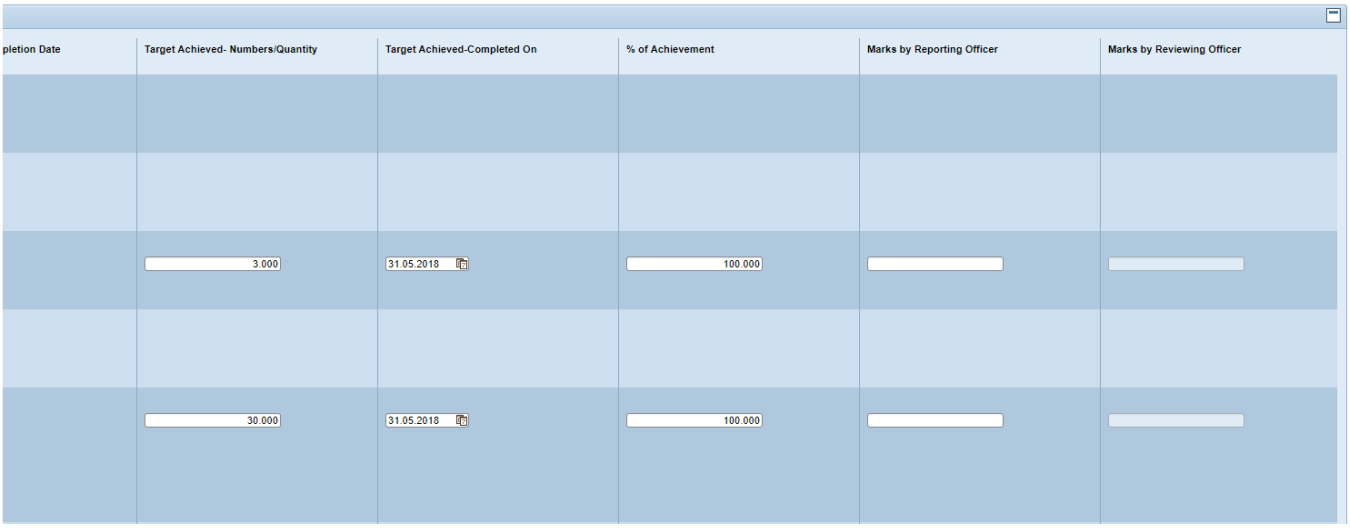
Click on any appraisal document to review the self-input –



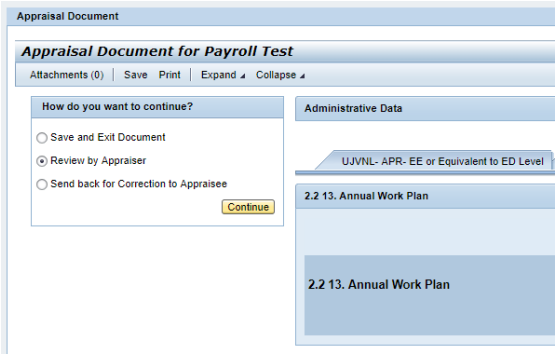
Click on Section – II : By Reporting Officer –

Click on the valid option – (Yes/No) for General reputation of the Appraisee for honestly is Good –

And Enter the comments.



Enter the Marks by Reporting Officer.

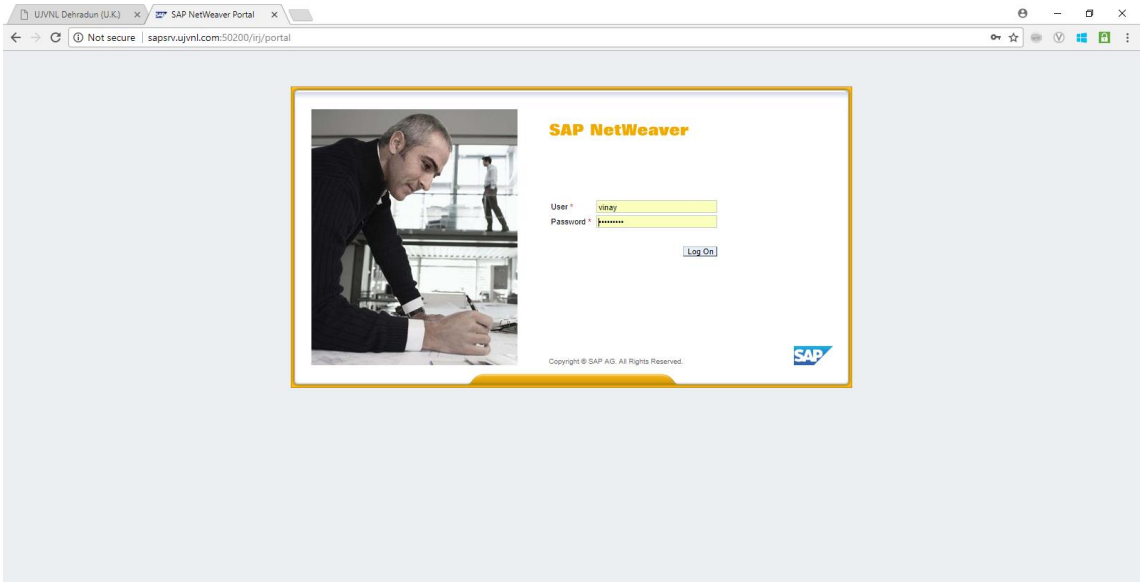


Click on Review by appraiser.

LOGON TO PORTAL:

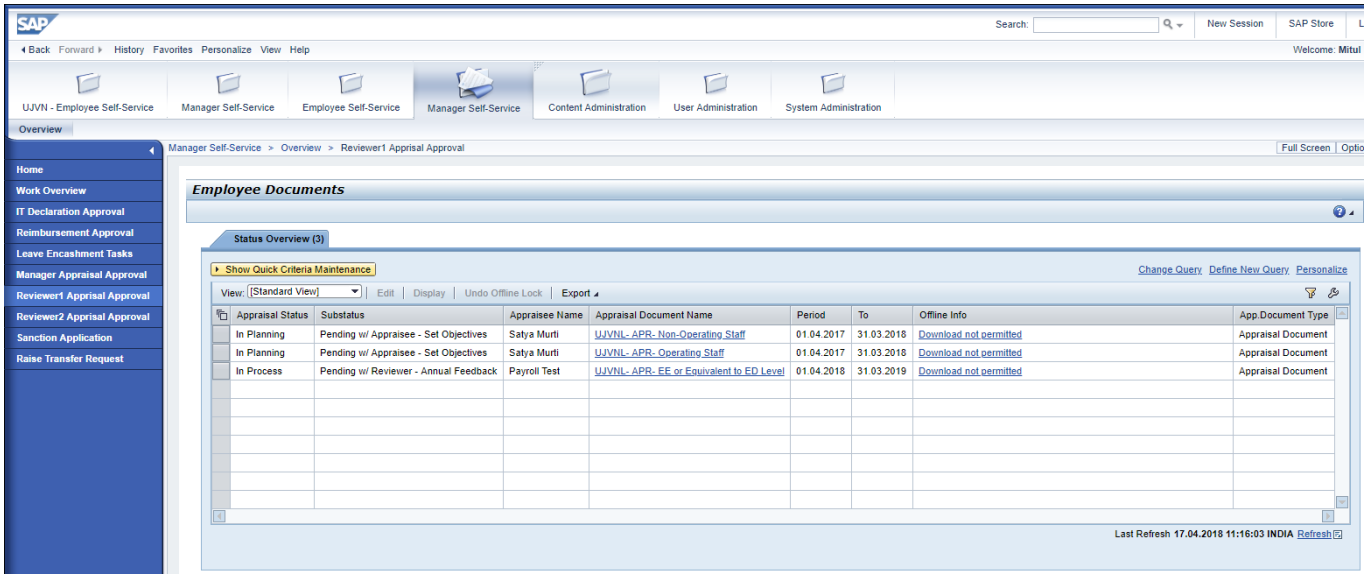
The Employee should follow the steps below to enter portal

- Select internet explorer icon and double click on it.
- Enter the site address http://sapsrv.ujvnl.com:50200/irj/portal, the system will display the screen as follows:

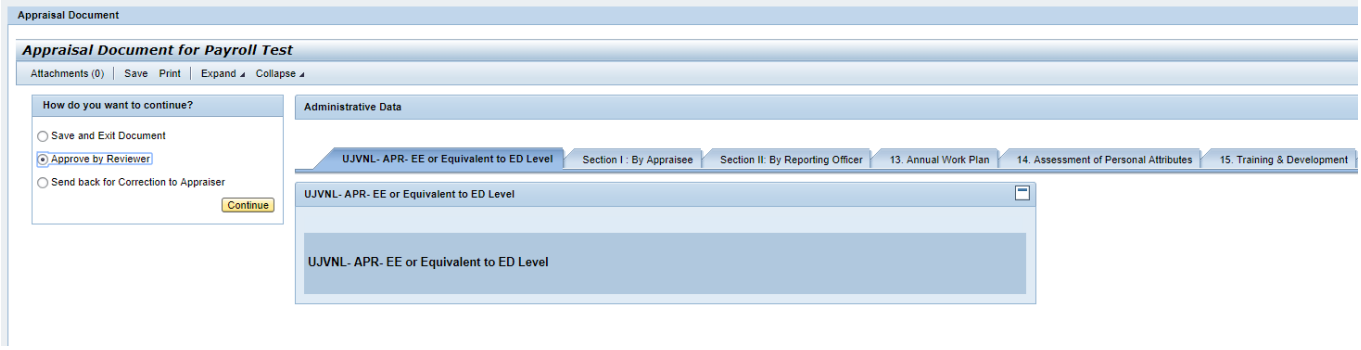


- Enter the EP user ID given (Ex: employee3), password and click on Log On Icon.
- Now system will take you to the home page of your Portal as shown below.

Click on Manager Self-Service and Reviewer1 Appraisal Approval, below screen will appear –

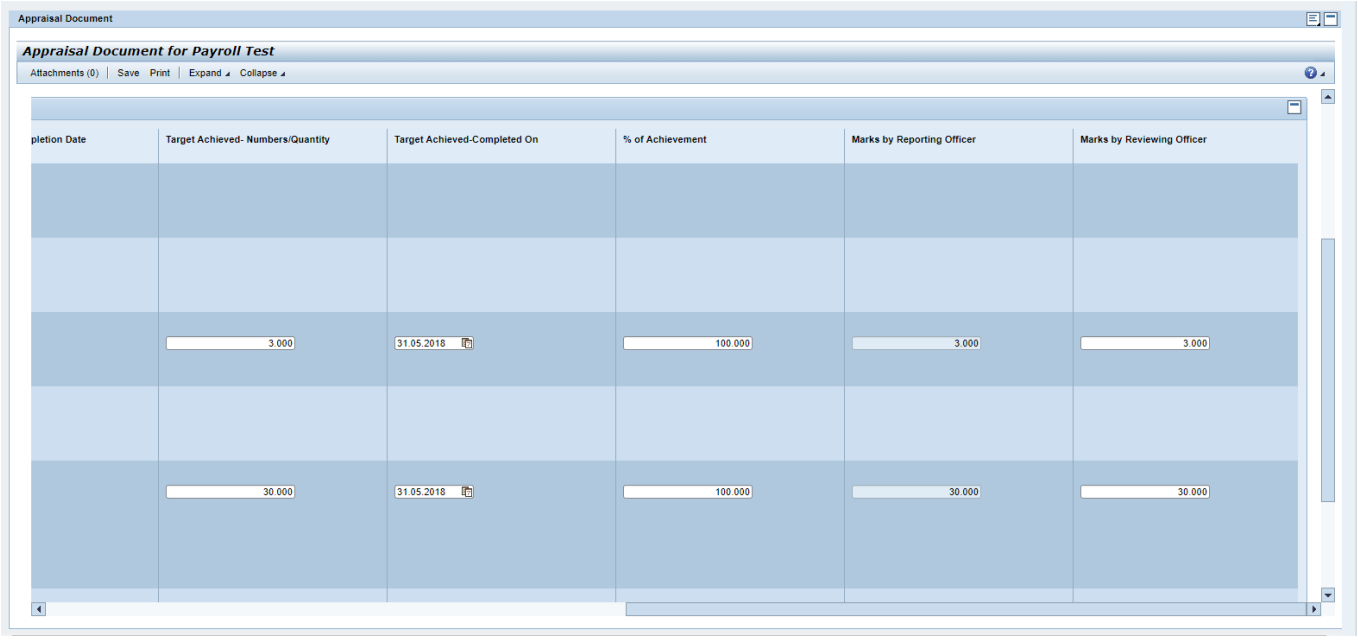


Click on any appraisal document to review the self-input –

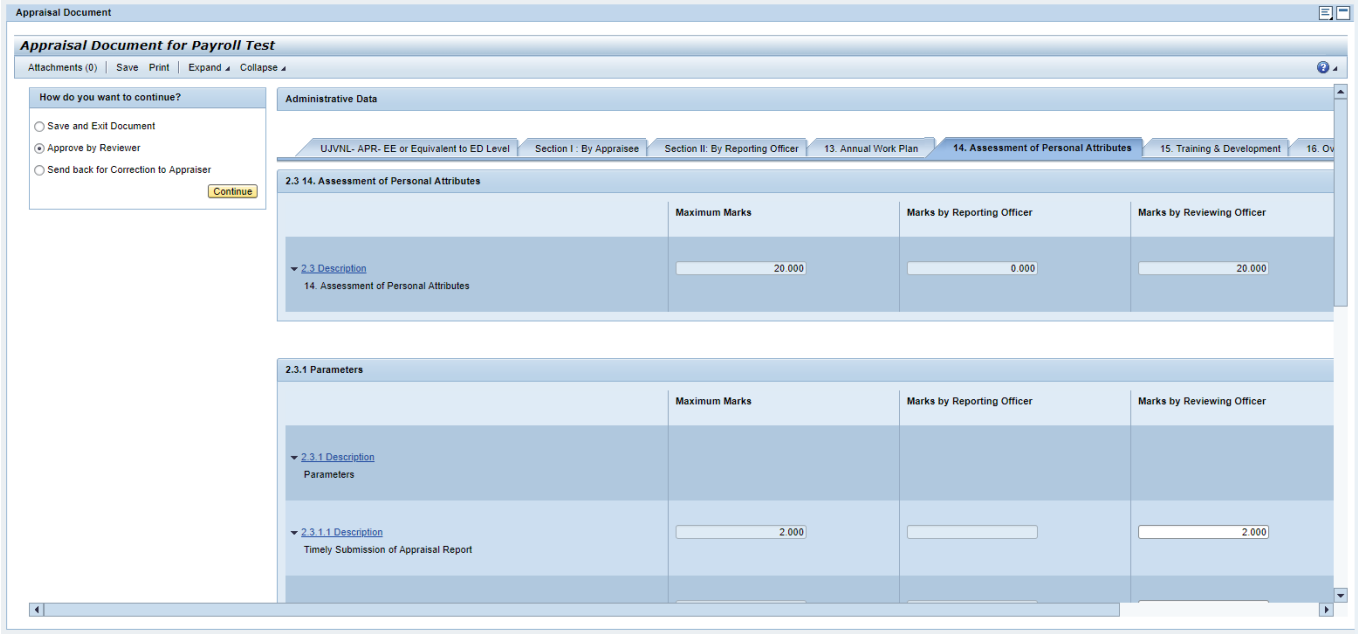


Review as Reviewer –

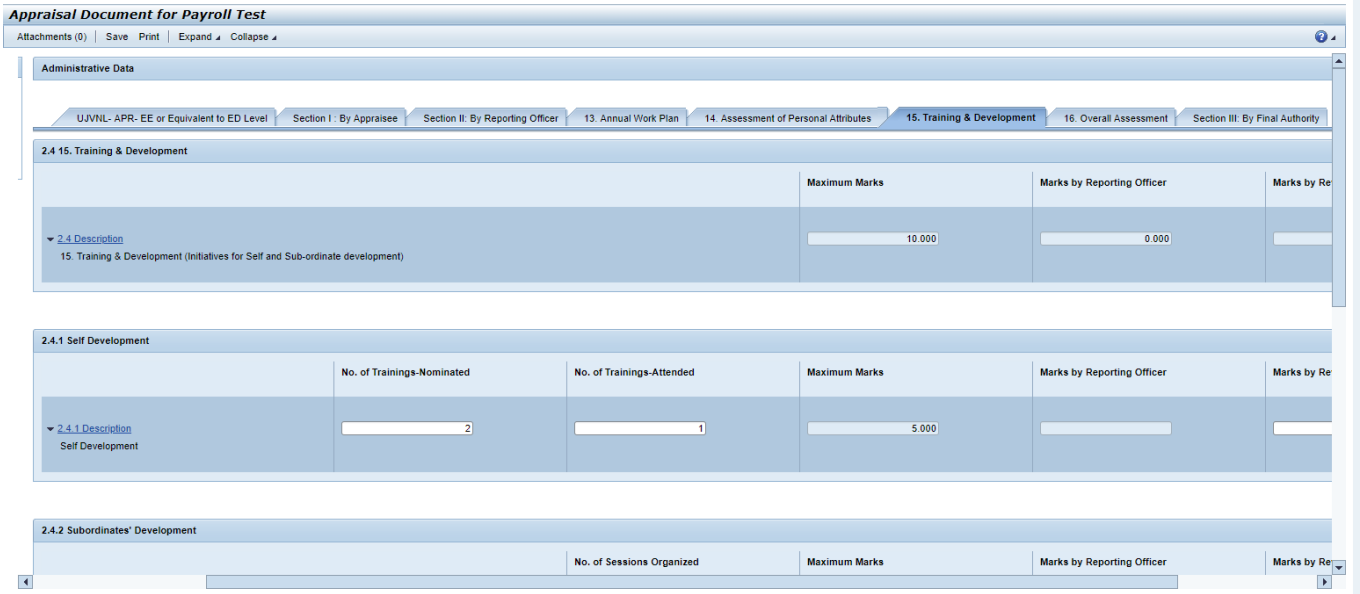
Review the Section II : Reporting officer, Annual workplan (Marks given by Reporting officer will be copied to the fields of reviewer) change the annual workplan marks as per the feedback by Reviewing authority.



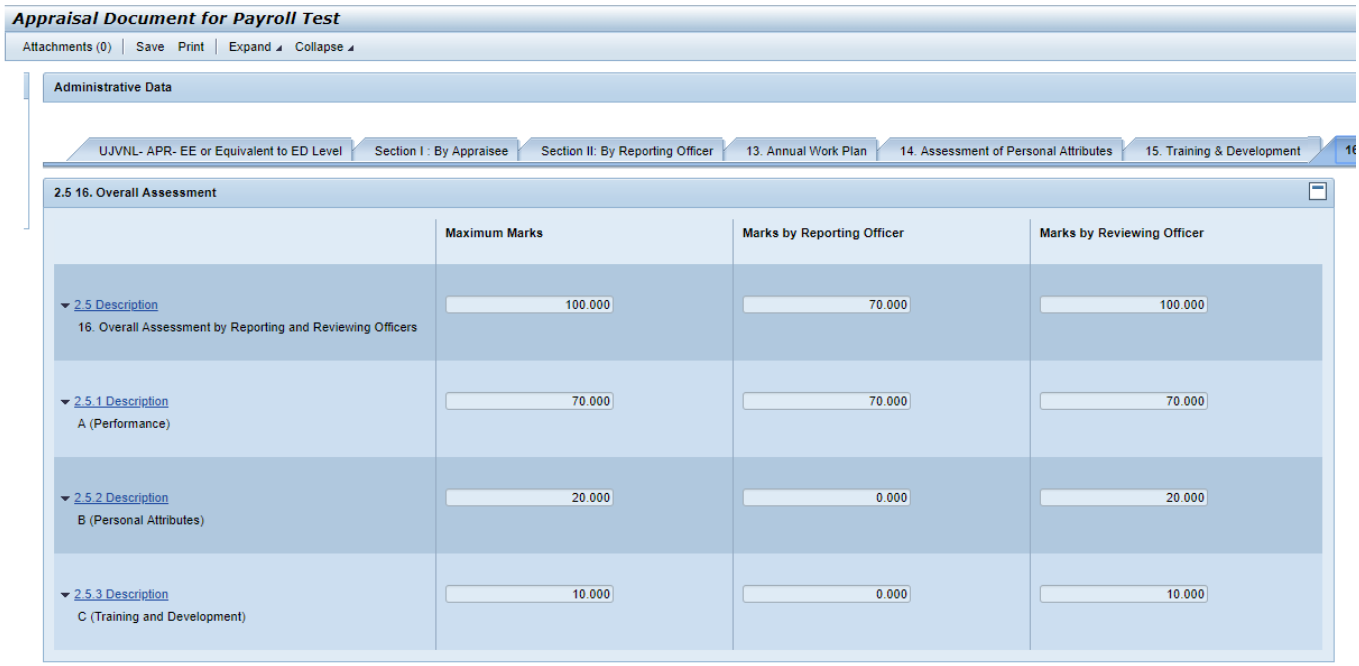
Enter the Marks for Personal Attributes –



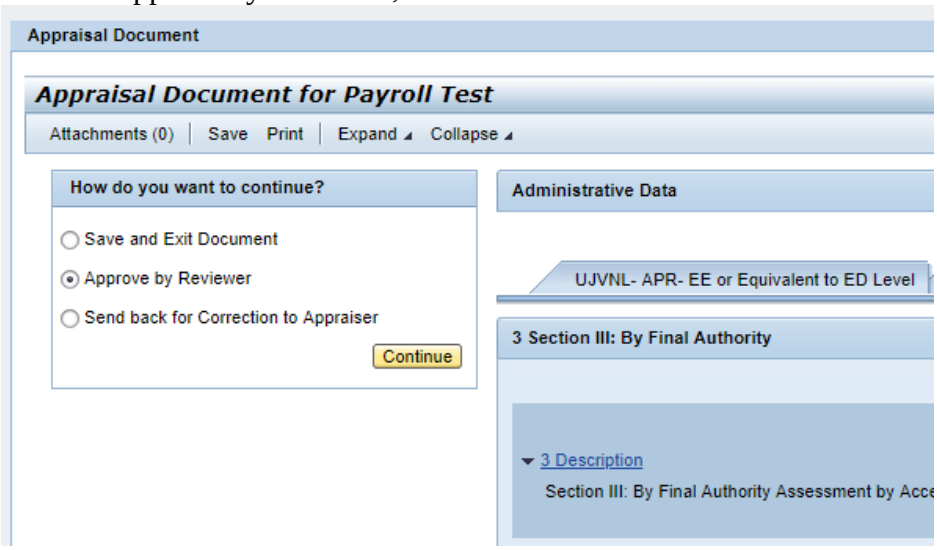
Enter the Marks for Training and development –



Review the over all assessment details –



Click on approve by Reviewer, and Click on continue –



7.4 RESULT

Appraisal document is reviewed by the appraiser and reviewing authority.

7.5 COMMENTS

None.

8 CHANGE APPRAISAL DOCUMENT STATUS

8.1 PURPOSE

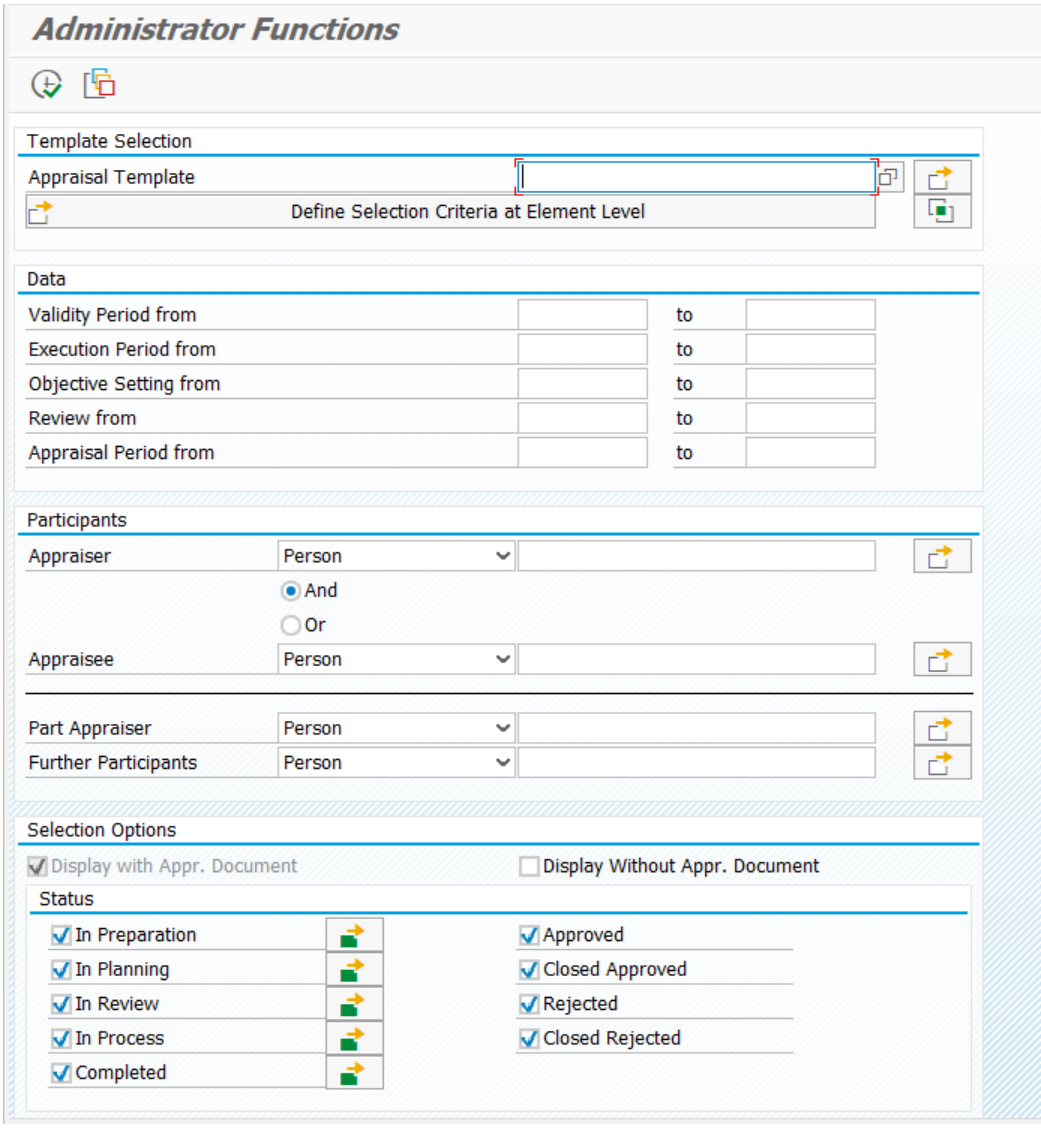
8.2 HELPFUL HINTS

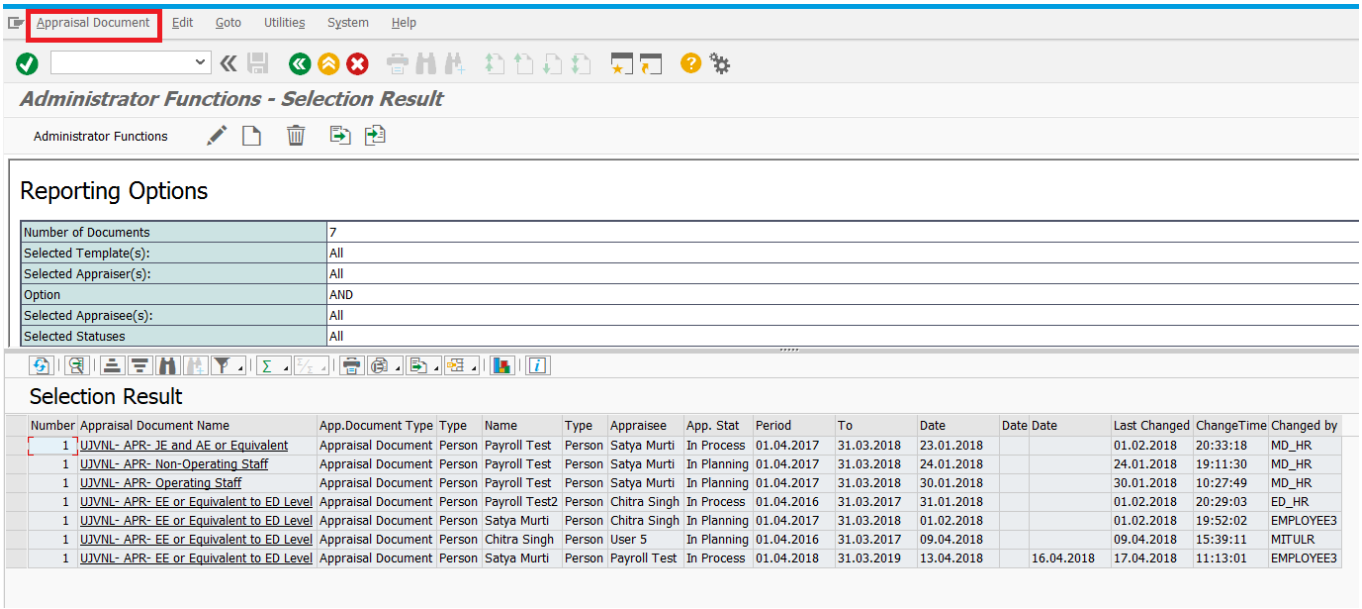
- Press F1 for help
- Press F4 for getting input values
- R – Required
- O – Optional
- C – Conditional

8.3 PROCEDURAL STEPS

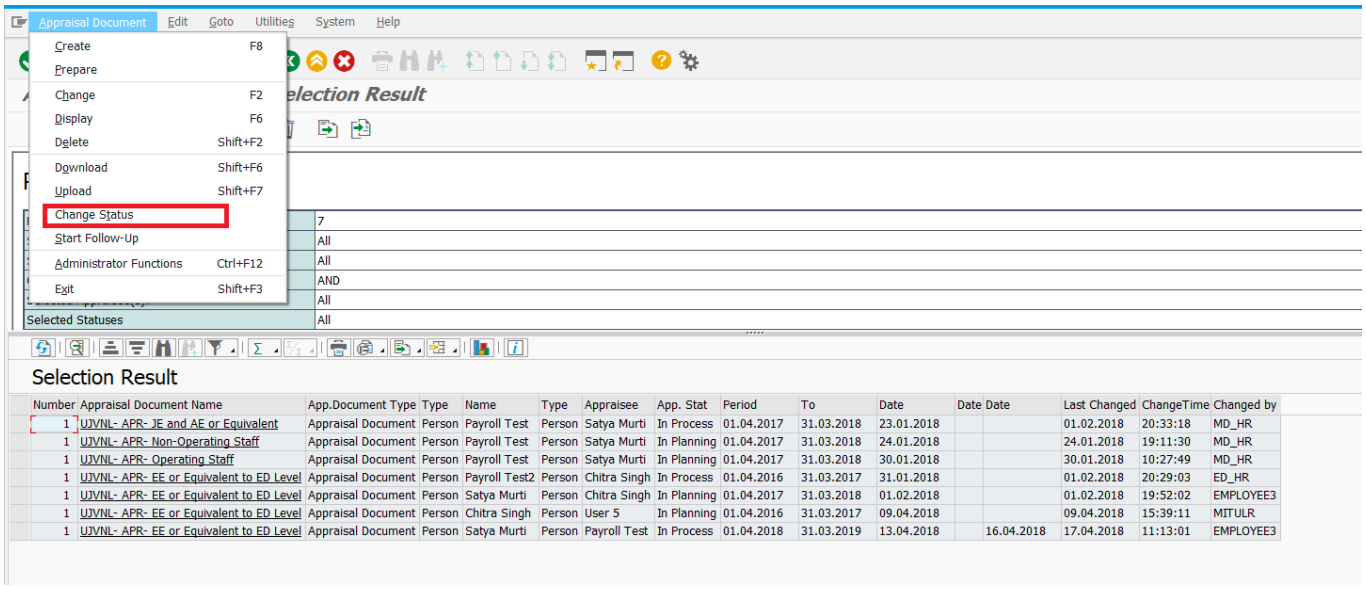
Menu Path	PHAP_ADMIN
Transaction Code	PHAP_ADMIN

Start the transaction using the menu path or transaction code.

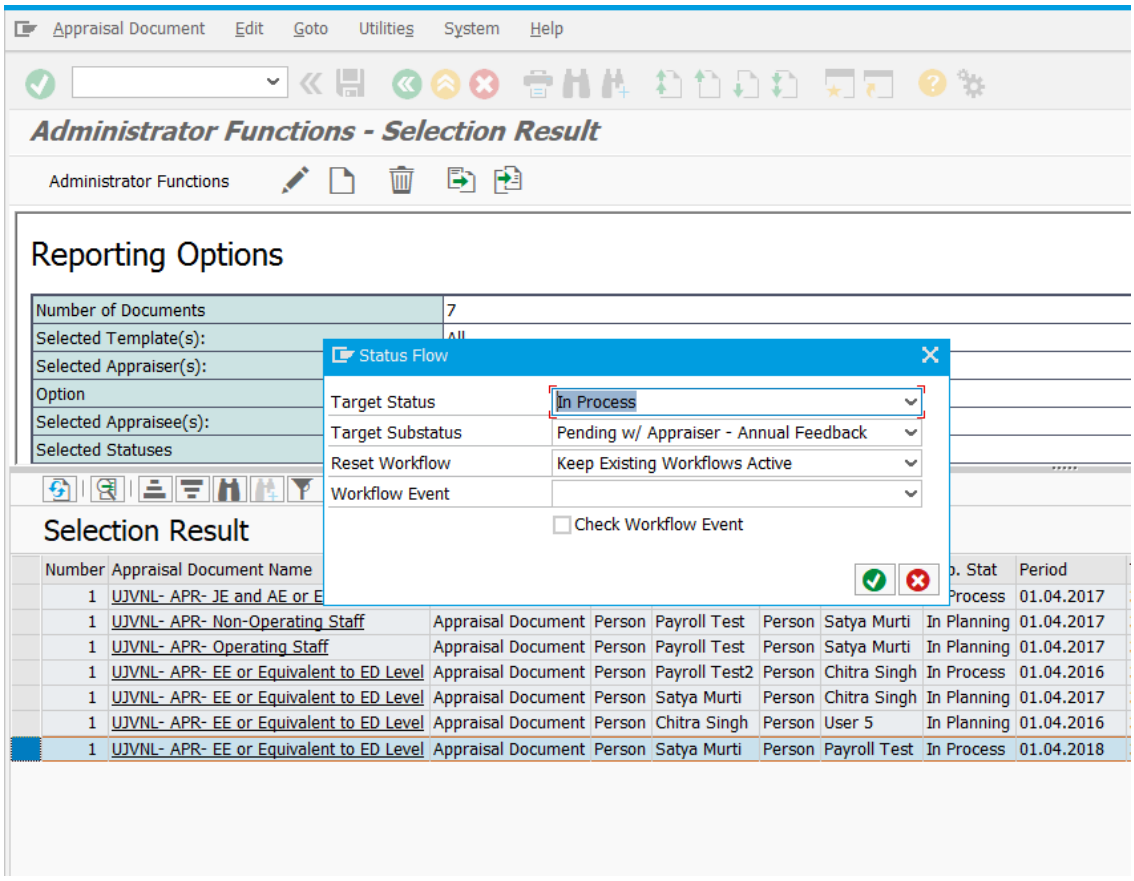




Click on Appraisal Document as highlighted in above snap shot.



Select the appraisal document to change the status and click Click on change status, Enter the status as shown below –



8.4 RESULT

Appraisal document status changed to Pending with Appraiser for Final Feedback.

8.5 COMMENTS

None.

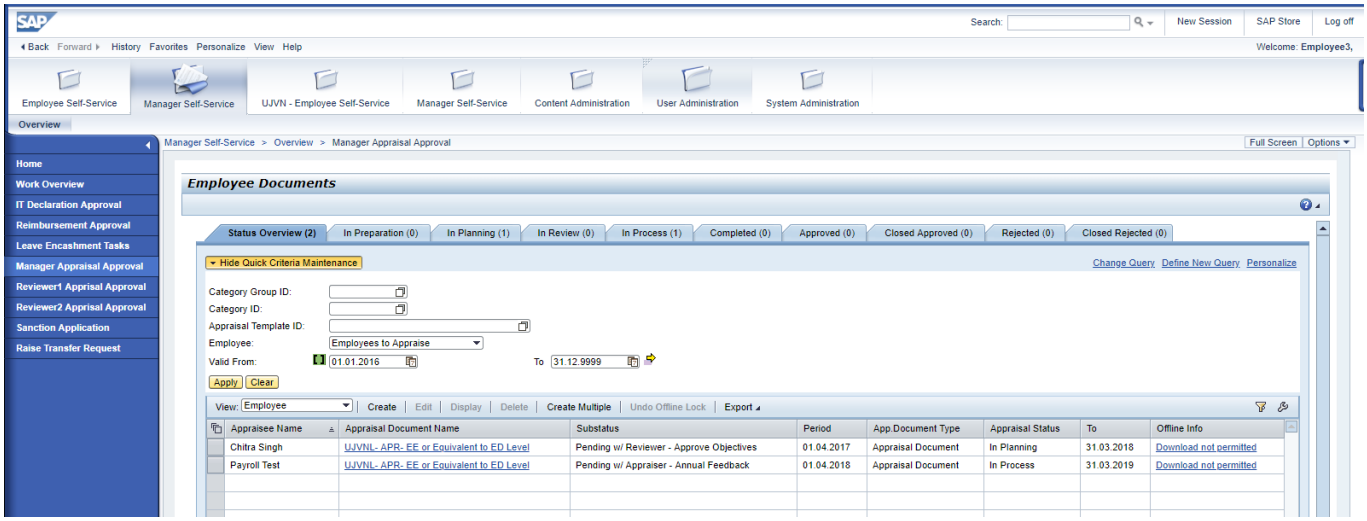
9 SUBMIT FEEDBACK

9.1 PURPOSE

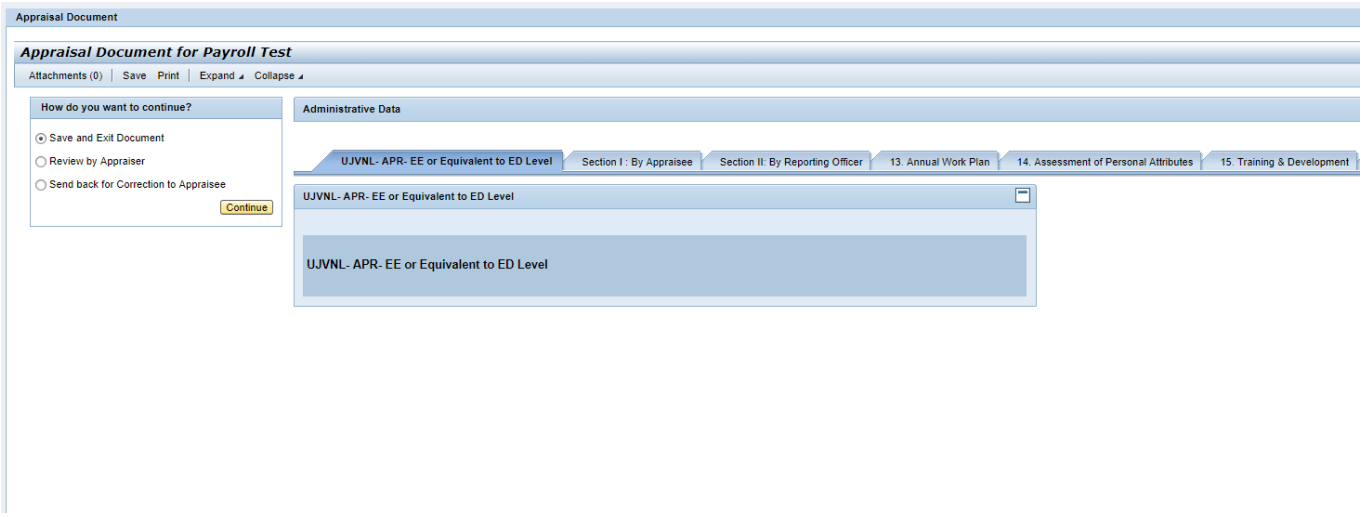
9.2 HELPFUL HINTS

- Press F1 for help
- Press F4 for getting input values
- R – Required
- O – Optional
- C – Conditional

9.3 PROCEDURAL STEPS



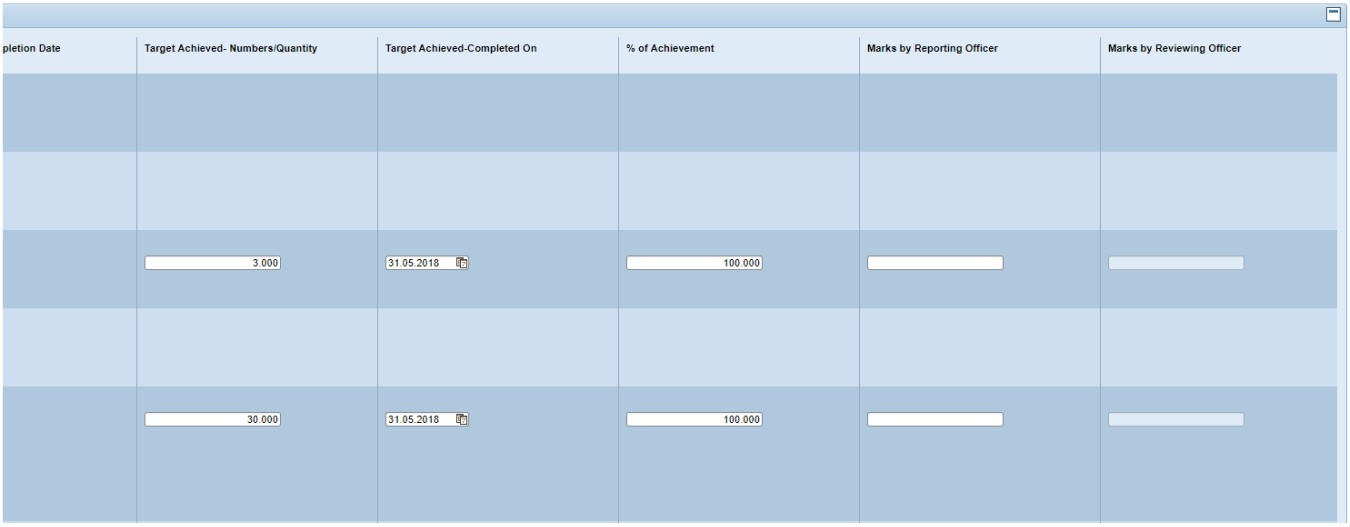
Click on any appraisal document to review the self-input –



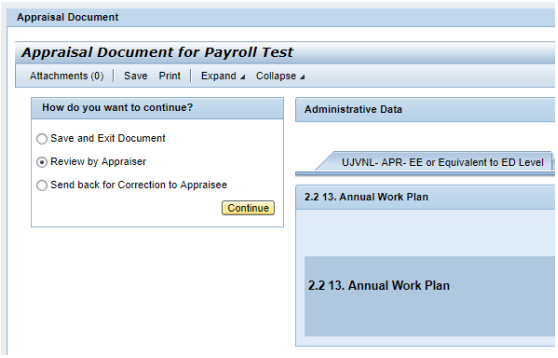
Click on Section – II : By Reporting Officer –

Click on the valid option – (Yes/No) for General reputation of the Appraisee for honestly is Good –

And Enter the comments.



Enter the Marks by Reporting Officer.

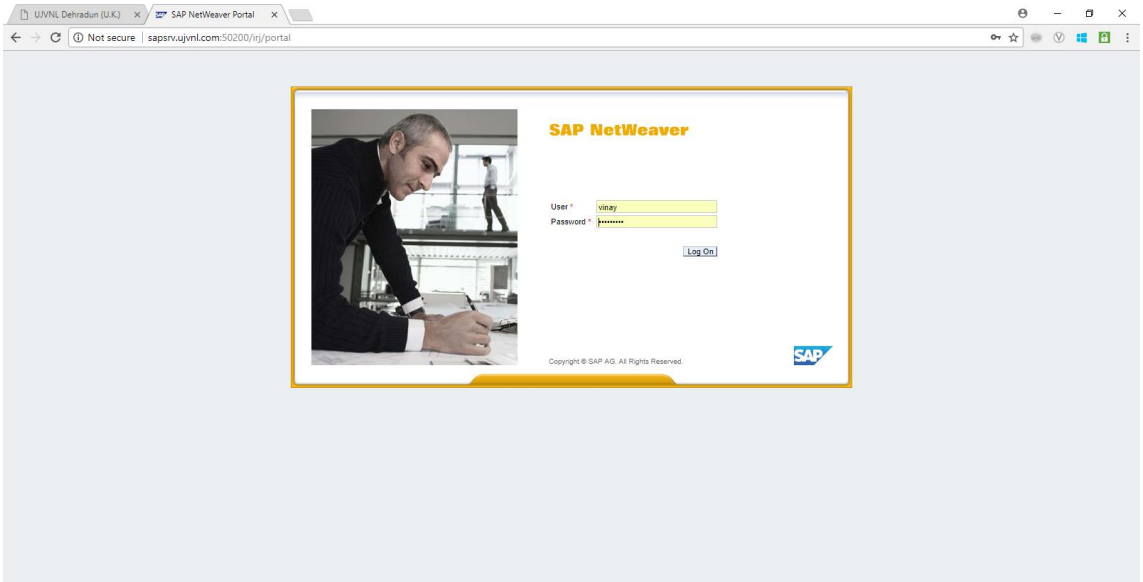


Click on Review by appraiser.

LOGON TO PORTAL:

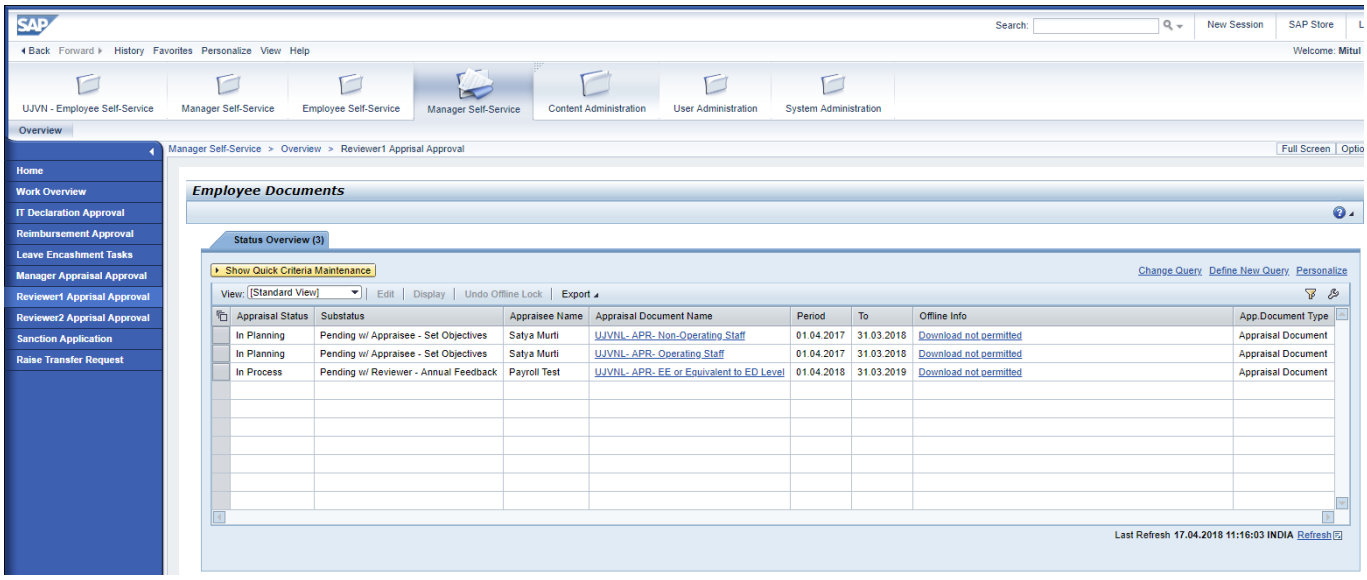
The Employee should follow the steps below to enter portal

- Select internet explorer icon and double click on it.
- Enter the site address http://sapsrv.ujvnl.com:50200/irj/portal, the system will display the screen as follows:

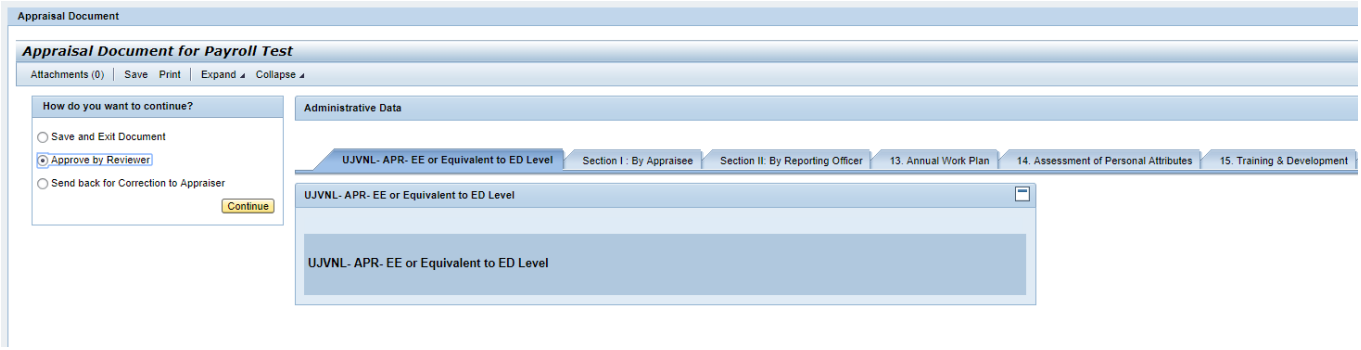


- Enter the EP user ID given (Ex: employee3), password and click on Log On Icon.
- Now system will take you to the home page of your Portal as shown below.

Click on Manager Self-Service and Reviewer1 Appraisal Approval, below screen will appear –

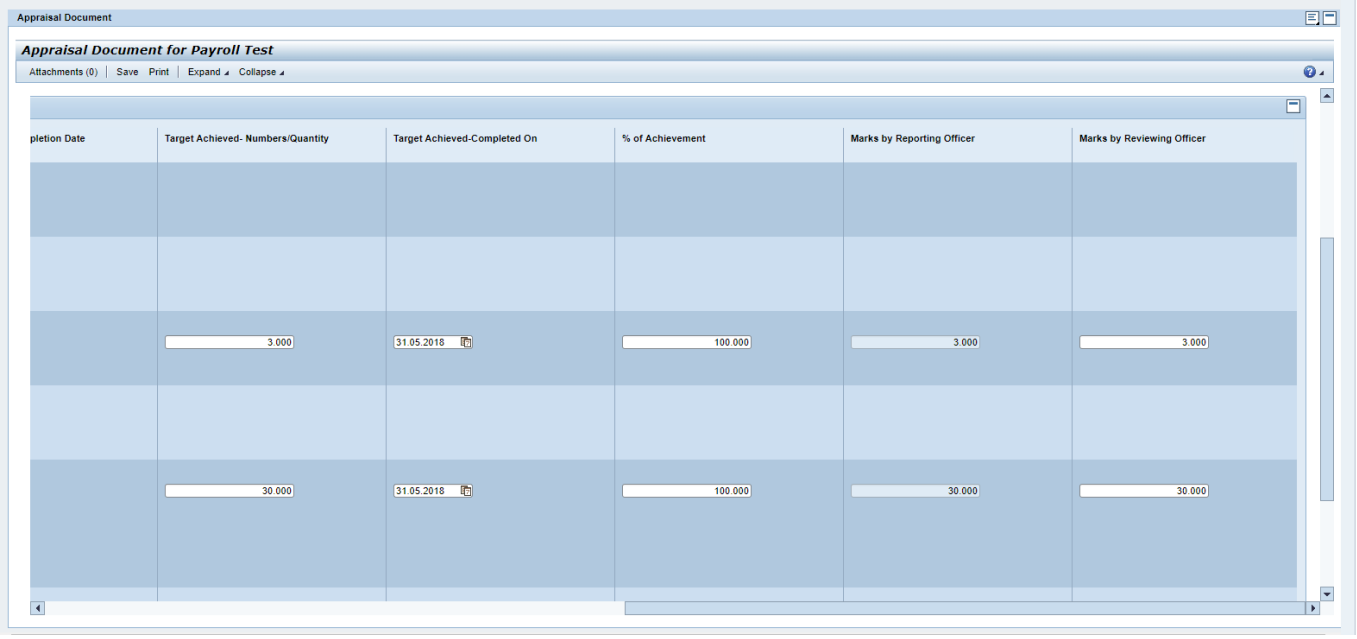


Click on any appraisal document to review the self-input –

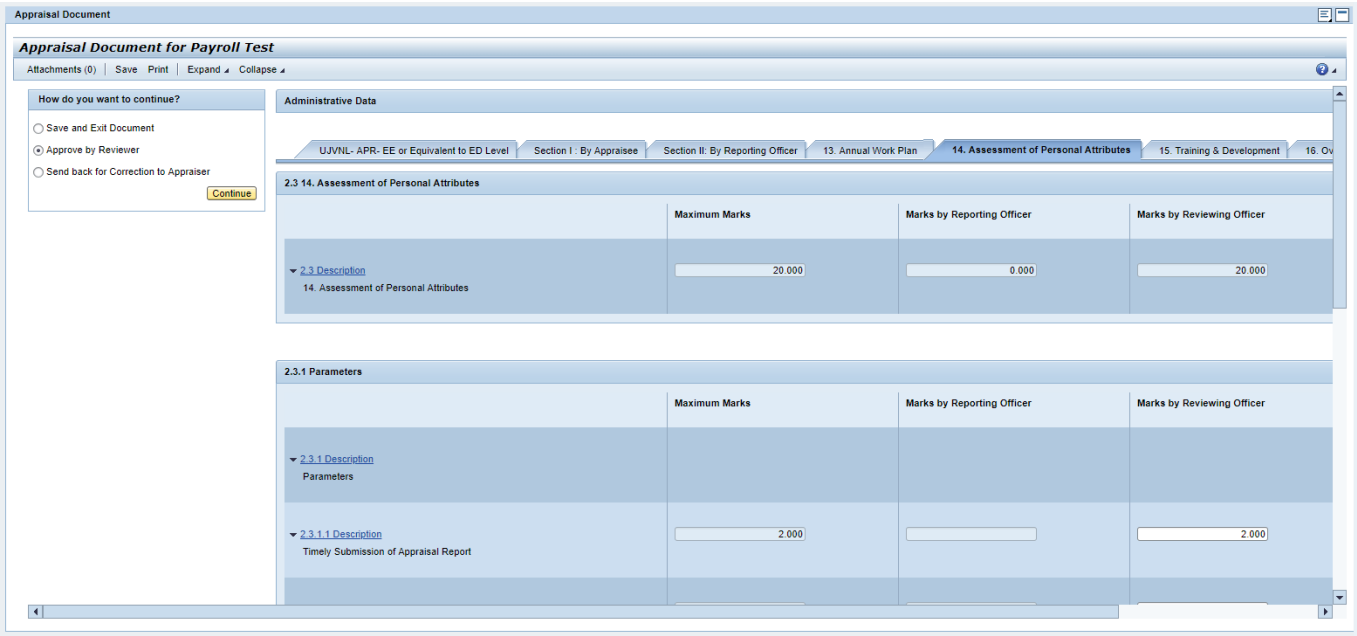


Review as Reviewer –

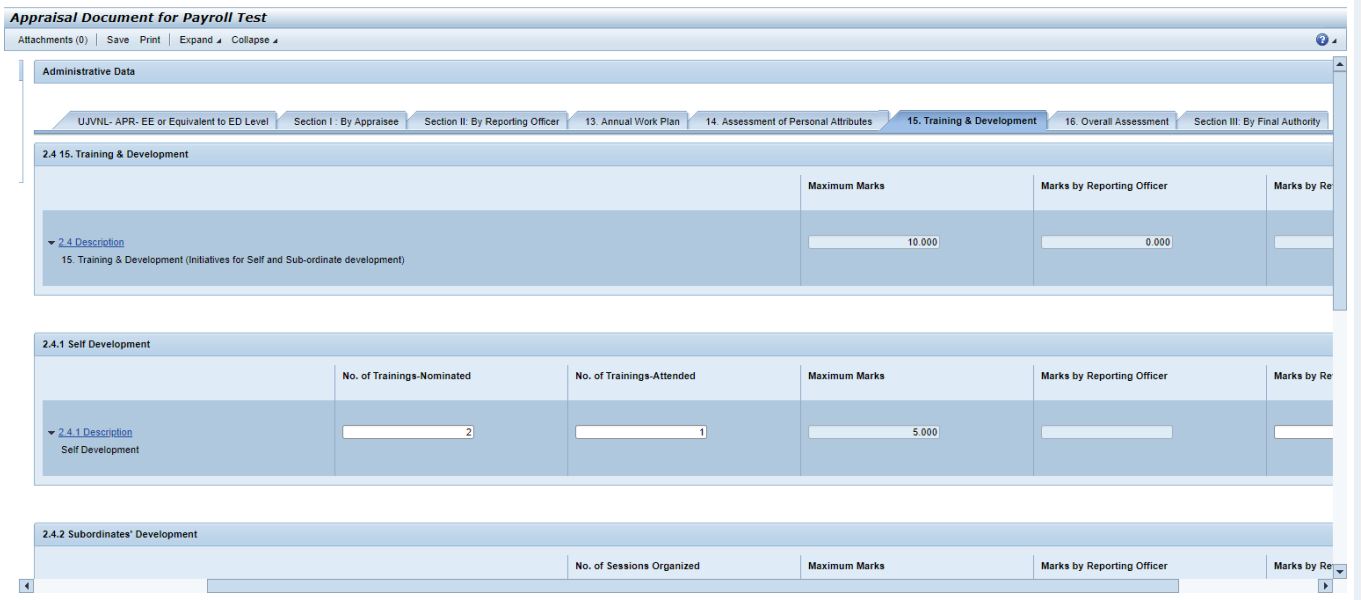
Review the Section II : Reporting officer, Annual workplan (Marks given by Reporting officer will be copied to the fields of reviewer) change the annual workplan marks as per the feedback by Reviewing authority.



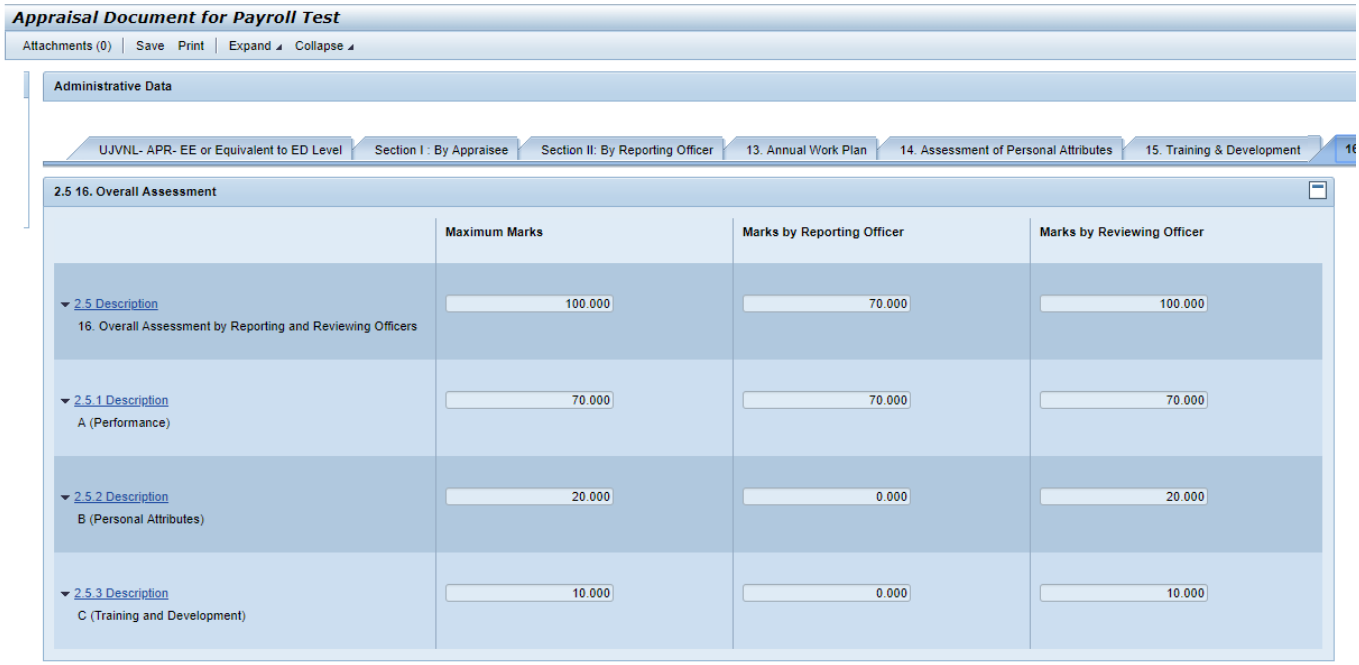
Enter the Marks for Personal Attributes –



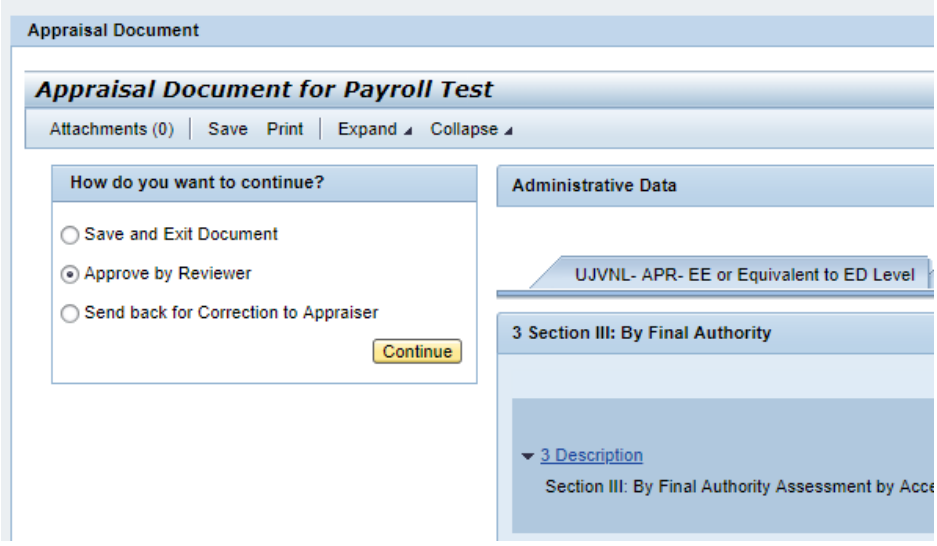
Enter the Marks for Training and development –

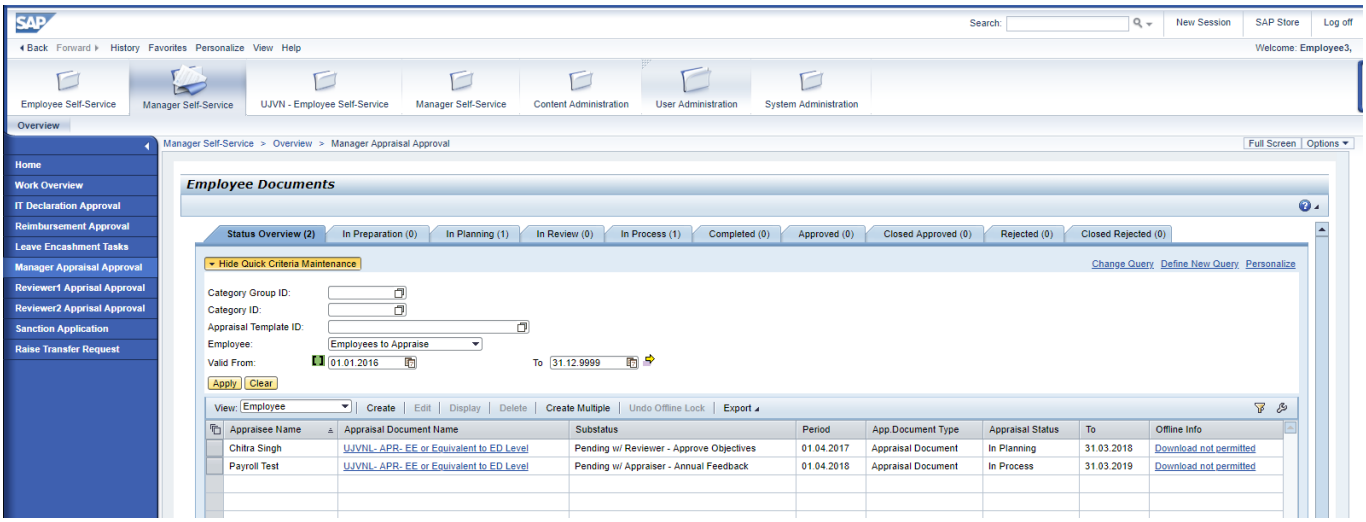


Review the over all assessment details –

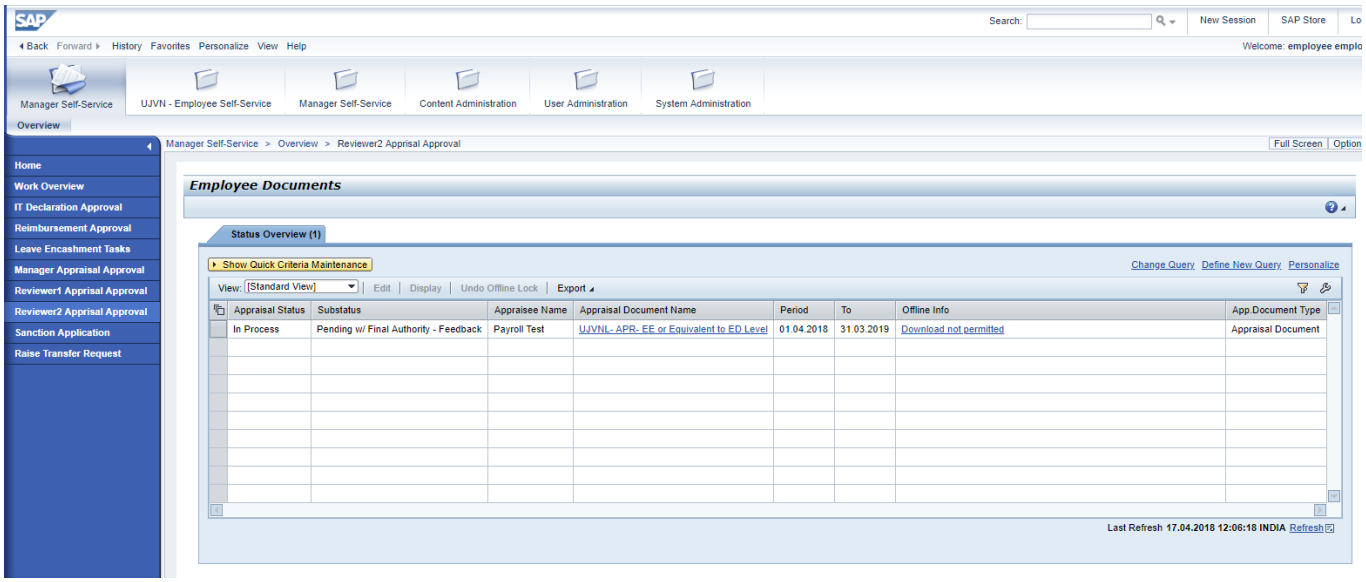


Click on approve by Reviewer, and Click on continue –

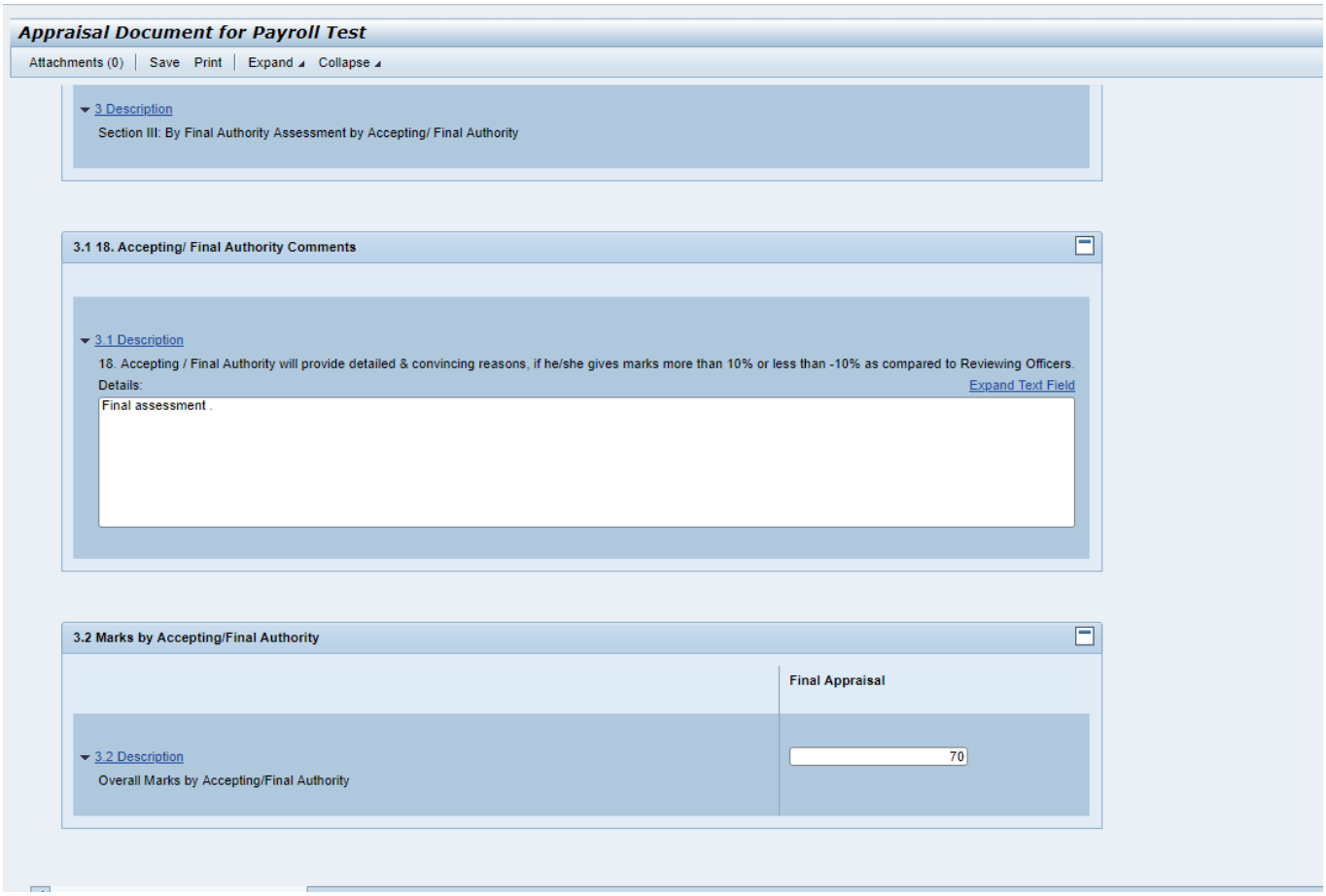




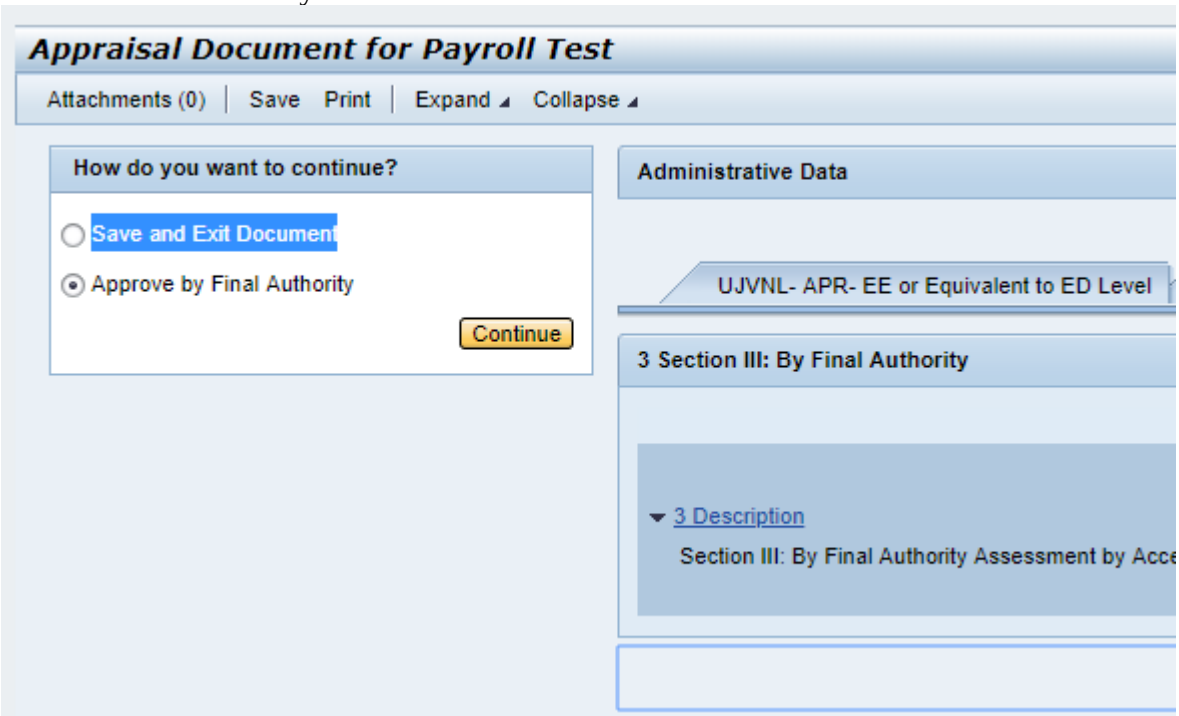
Final authority Annual feedback –
Logon to MSS and click on Reviewer2 Appraisal Approval –



Click on Appraisal document to submit the final feedback –
Review the details -



Enter the Final authority remarks.



Click on Approve by Final Authority.

9.4 RESULT

Final feedback submitted by Final authority.

9.5 COMMENTS

None.

10 CREATE MASS APPRAISAL DOCUMENT

10.1 PURPOSE

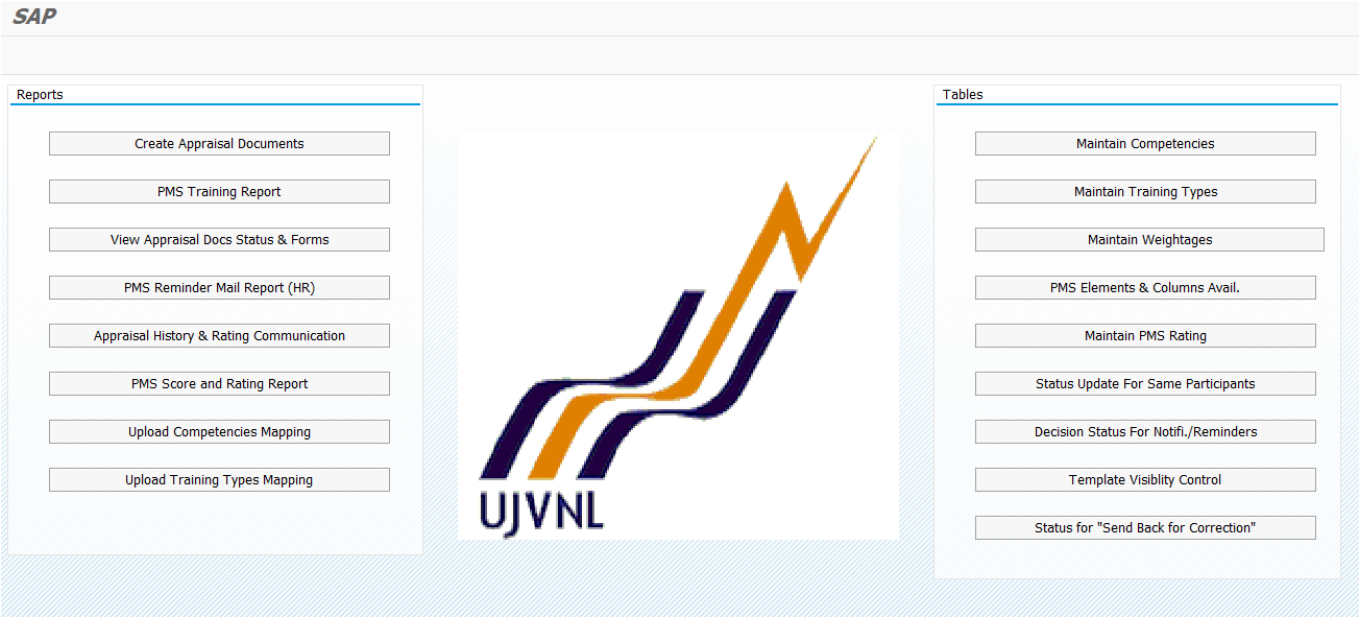
10.2 HELPFUL HINTS

- Press F1 for help
- Press F4 for getting input values
- R – Required
- O – Optional
- C – Conditional

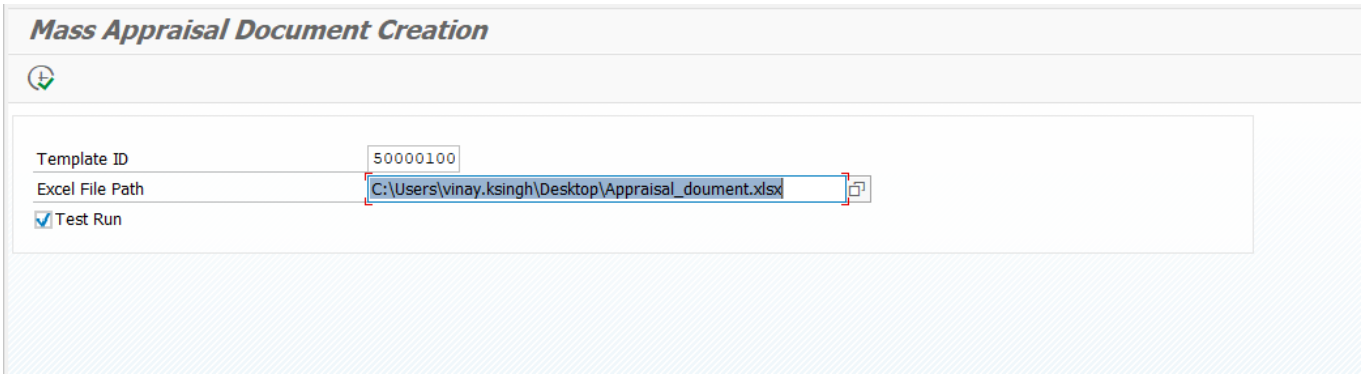
10.3 PROCEDURAL STEPS

Menu Path	ZHR_PMS - > Create Appraisal Documents
Transaction Code	ZHR_PMS

Start the transaction using the menu path or transaction code.



Click on Create Appraisal Documents –



Select the Template ID and browse the File.Click on execute all the appraisal doument will be created in th system.

10.4 RESULT

Appraisal document created for the employee mentioned in the template.

10.5 COMMENTS

None.