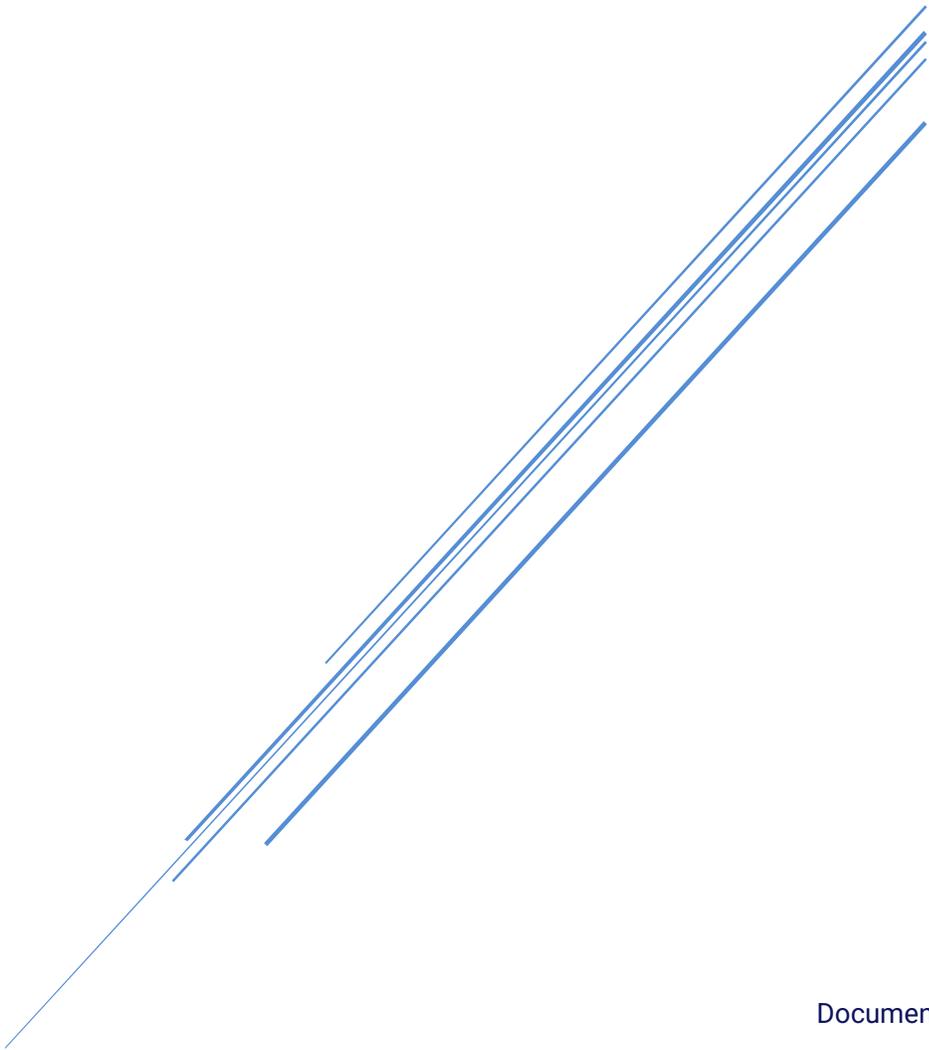




TIMES PRO Appraisal

User Guide for Administrator



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Table of Contents

CHAPTER 1.	INTRODUCTION	3
CHAPTER 2.	FIRST TIME LOGGING INTO THE TIMES APPRAISAL	4
CHAPTER 3.	DASHBOARD	5
CHAPTER 4.	CODE SETUP	6
CHAPTER 5.	FORM SETUP	7
	5.1 Saving the Appraisal Form as a Draft Copy	9
	5.2 Creating a new Appraisal Form	10
	5.3 Form Details.....	11
	5.3.1 Understanding the Form Details	12
	5.3.2 Editing Form Details	15
	5.4 Section	16
	5.4.1 Understanding the Section Details	18
	5.4.2 Understanding the Section's Profile Access Details.....	21
	5.4.3 Editing and Deleting the Section	22
	5.5 Question.....	23
	5.5.1 Question Type and Details	24
	5.5.2 Question Access.....	28
	5.5.3 Create New, Edit and Delete Question Access	30
	5.5.4 Score Group for Question Types Self-Define and Pre-Define.....	33
	5.5.5 Score Details	35
	5.5.6 Control Setup for Question Types Text and Paragraph Text	37
	5.5.7 Setting up Values for the Question Type Multiple Choice, Checkbox and Choose from a List.....	37
	5.6 Create a new Appraisal Form by Copying from another Form	38
	5.7 Deleting an Appraisal Form	39
	5.8 Printing an Appraisal Form	39
CHAPTER 6.	POLICY SETUP	40



Chapter 1. Introduction

TIMES Appraisal is a web based system designed specifically to assist Human Resource professionals to streamline tedious annual appraisal activity for each departmental staff. The system provides a flexible platform to design and implement appraisal systems that matches closely to each company's unique appraisal guidelines, regardless of whether the guidelines are simple or complex. The system captures appraisal information in great detail and this allows a company to evaluate and preserve its' investments.

Using the latest web technology, TIMES Appraisal provides an online portal for every employee within organizations to perform and submit their performance appraisals to respective supervisors with ease and convenience of a web browser. All information is captured in real time and employees can view their own appraisal results and feedbacks online. Preparing hardcopies of appraisal forms and labor intensively filling in forms are a thing of the past.

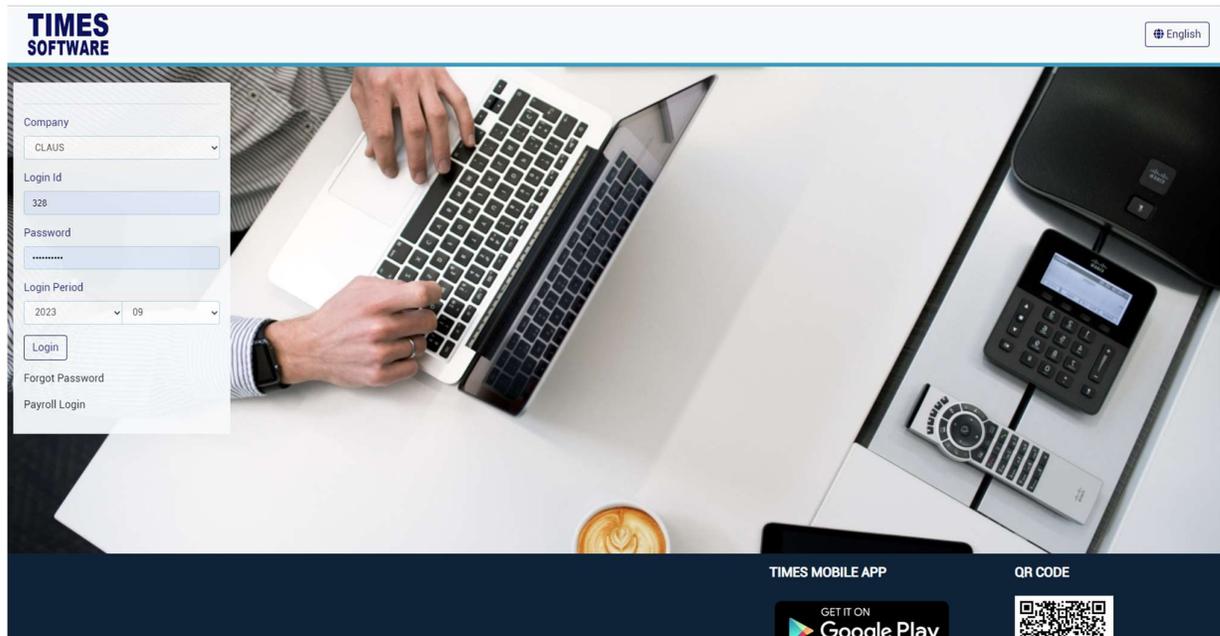
The management of the organizations receives up to date information on employee self appraised KPIs, performance factors, competency skills, plans and qualitative goals and can view them online conveniently via a web browser. Action can then be taken to approve the employees' performance appraisals or even adjust them accordingly to match company objectives. Many industry standard appraisal reports are provided within the system, eliminating the need for the management to manually prepare such reports. All these save the management precious time and allows the management to focus on higher value-added operational needs.

When it comes to managing organizational wide annual appraisal activities, TIMES Appraisal delivers them through innovation, systematic approach and transparency.

Chapter 2. First time logging into the TIMES Appraisal

Open internet browser and enter the URL address to access the TIMES Solution portal login web page, example: <http://www.myportal.com/SolutionPro>

An example of the login page is shown below.



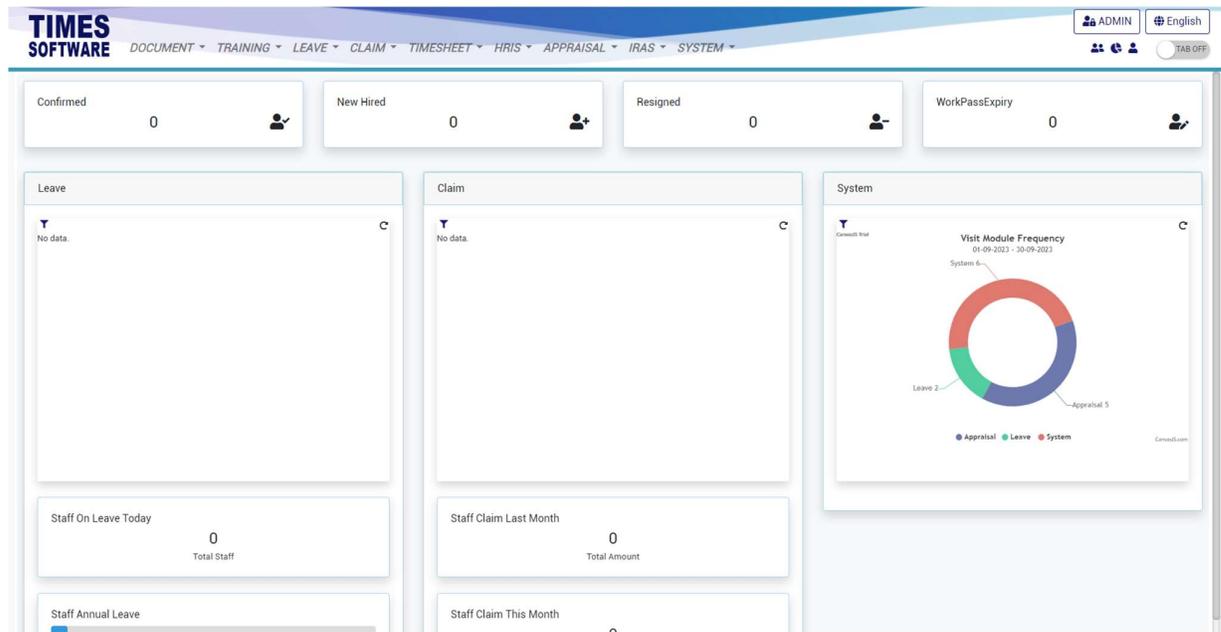
1. Click on the “Company” drop-down list to see a list of available companies and choose the one that you want to access to.
2. Key in login id at “Emp No”.
3. Key in password at “Password”.
4. Click the  button to login into the system.



To effectively use this guide, ensure that user are given the role of Administrator for the company that you are logging into. If the role is not setup yet, use login id *Admin* at “Emp No” to login as the Administrator.

Chapter 3. Dashboard

After logging into the system, you will be presented with your dashboard.

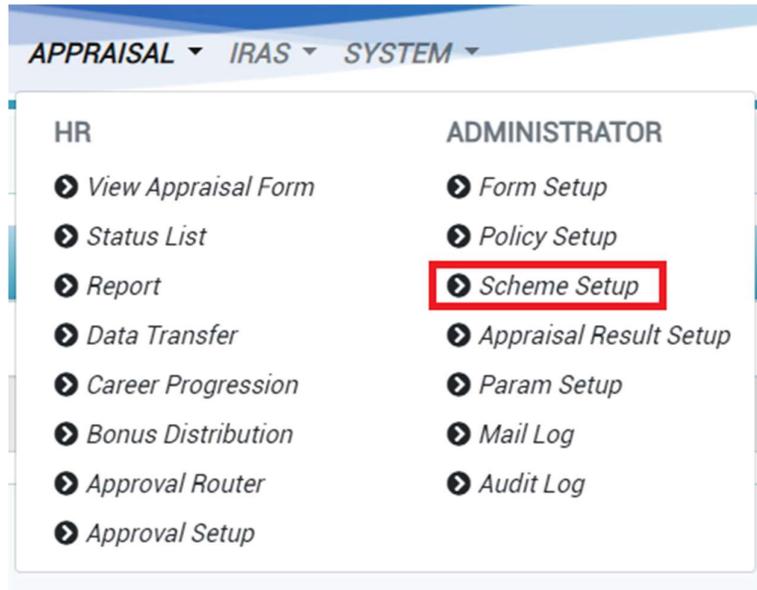


The dashboard shows you a list of items that require your attention.

You can click on any of the items to access it.

Chapter 4. Code Setup

You can create and manage master codes in **Scheme Setup**. Codes defined here are used to populate drop-down lists in the TIMES PRO Appraisal system.



Click on the **Scheme Setup** option in the Administrator menu to access the Code Setup web page.

	Code	Description
 	EXEC	EXECUTIVES
 	N-EXEC	NON-EXECUTIVES

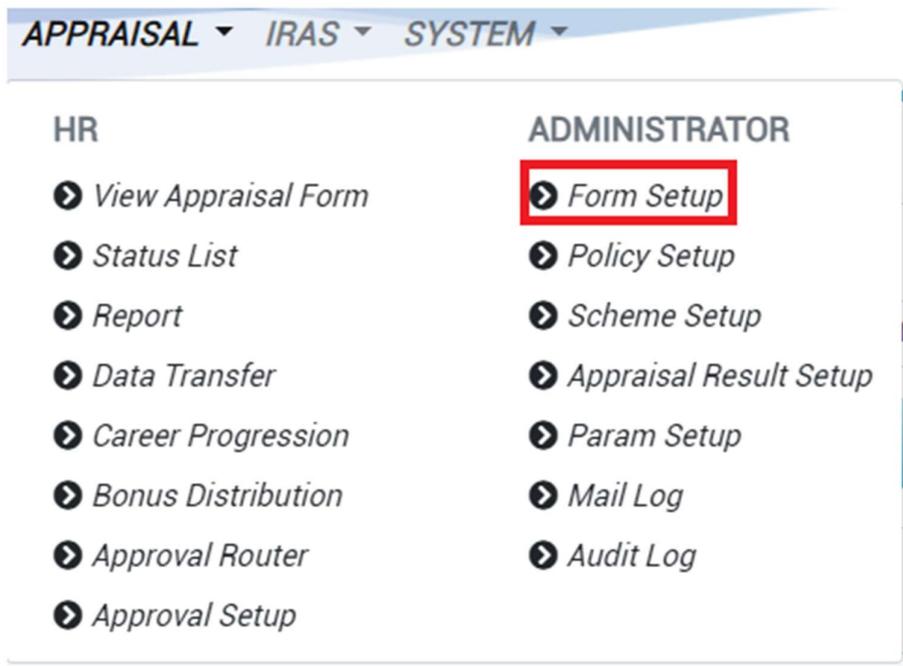
To add a new code, click on the  button. Enter in the details for the new code and click  button to save the code or  button to cancel.

To edit an existing code, click on  button, enter the new details and click  button to save the code or  button to cancel.

To delete a code, click on  button.

Chapter 5. Form Setup

All appraisal forms are designed and published via the **Form Setup** web page.



Click on the **Form Setup** option in the Administrator menu to access the Form Setup web page.



If you have existing appraisal forms you can look for them by choosing the filters “Appraisal Type”, “Year” or “Tag” and “Form”.

To create a new appraisal form click on the  **Add** button.

To edit an existing appraisal form choose a form from the “Form” drop-down list and click on the

 **Edit** button.



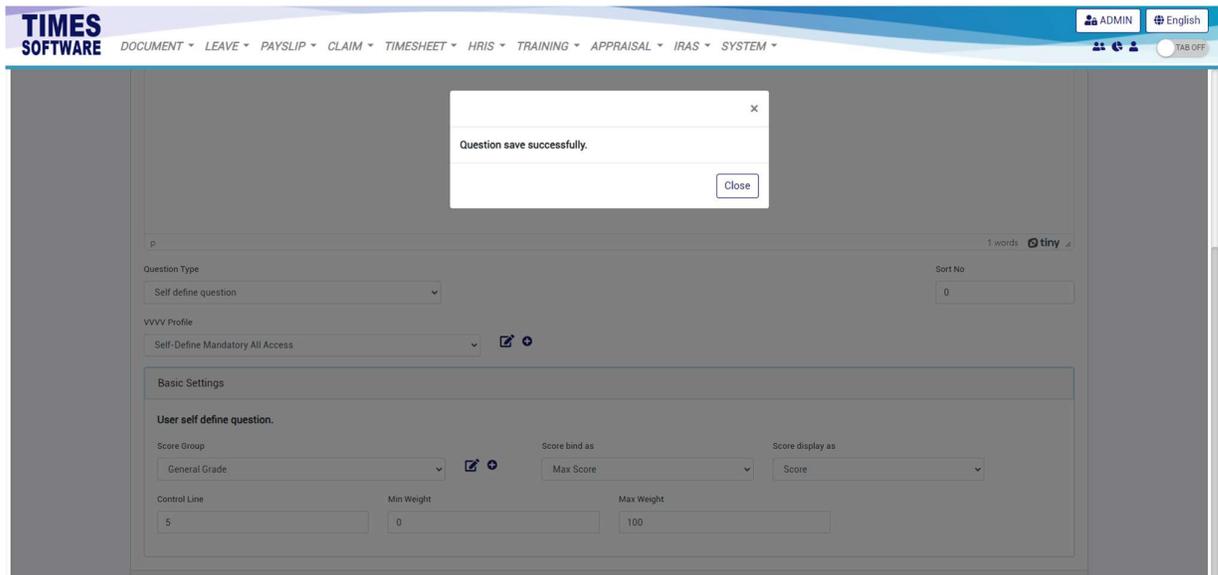
To print an appraisal form into an excel document choose a “Form” and click on the  button.

To delete an appraisal form, choose a “Form” and click on the  button. You can only delete an appraisal form if no users have used it yet.



5.1 Saving the Appraisal Form as a Draft Copy

As designing the appraisal form can take considerable amount of time it is wise to save your appraisal form as a draft copy from time to time while you are working on it. The last thing you need is to get timed out session from your server which results in you being automatically logged out from the system and losing your work.



5.2 Creating a new Appraisal Form

To create a new appraisal form you will need to setup 3 components of the form.

The first component is called the **Form Details**. Form details determine the appraisal type, title, appraisal period, final grading and the number of reviews that will be conducted for the appraisal form.

The second component is called the **Section**. Each section represents a page (tab) in an appraisal form. In a Section you can indicate description text (typically instructions) that users can read and access rights to determine who and what can be done in the page.

The third component is called the **Question**. A question can comprised of either:

1. A goal setting or KPI question (also known as **Self-Define Question**) that users can enter their objectives, weightages and scores,
2. Performance factor question that has **Pre-defined** set of criteria that users can rate against,
3. **Free-field** or free-form question that has no weightage and score, and its purpose is to record down answers from users or just to show information as a label.

You can create all three types of questions and as many as you like in a single Section (page) of the appraisal form.

Let's have a look at the **Form Details** first.

5.3 Form Details

When you first create a new appraisal form you will access the **Form Details** web page first. You must complete the setup of the Form Details before you can create the Sections of the appraisal form.

The screenshot shows the 'Form Details' page in the Times Software system. The page has a navigation bar at the top with the Times Software logo and various menu items like DOCUMENT, LEAVE, PAYSIP, CLAIM, TIMESHEET, HRIS, TRAINING, APPRAISAL, IRAS, and SYSTEM. The main content area contains a form for configuring an appraisal form. The form includes the following fields and options:

- Appraisal Type:** Performance Appraisal (dropdown)
- Grade:** DEFAULT NEW GRADE GROUP (dropdown)
- Required Calculate:**
- Year:** (text input)
- Review:** 1 (text input)
- Description:** (text input)
- Start Date:** mm/dd/yyyy (calendar icon)
- End Date:** mm/dd/yyyy (calendar icon)
- Switch Review:**
- Required Moderation:**

Below the form is a table with the following columns: Review, Description, Start Date, End Date, Self View, Self Submit, Sup Direct Submit, and Acknowledge. The table contains one row with the following data:

Review	Description	Start Date	End Date	Self View	Self Submit	Sup Direct Submit	Acknowledge
1	Review 1	mm/dd/yyyy	mm/dd/yyyy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom of the form, there are two buttons: **Save** (highlighted) and **Cancel**.

All fields that are marked with * must be filled up or selected before you can proceed to the next

setup. Click  button to save your transactions.

5.3.1 Understanding the Form Details

Here are the explanations for each of the functions in the Form Details web page.

Type

Indicate the type of appraisal for this appraisal form.

Performance Appraisals are available for confirmed employees only whereas *Probation Appraisals* are applicable for employees under probation only.

Form Title

The title of the appraisal form.

Start / End Date

The start date and end date of the appraisal period for this appraisal form. Once the appraisal period ends the appraisal form is no longer accessible by users.

Year / Tag

For Performance Appraisal specify the appraisal year in 4 digits.

As Probation Appraisals do not have a specific appraisal year you can specify a Tag (any abbreviation or id) to identify the probation appraisal form for searching purposes.

Auto Calculate Grade

Tick the checkbox if you want the system to calculate the final grade for this appraisal form based on the selected score range. If there is no score range you can create a new one.

+	Grade	From	To	Description	Increment Factor	Bonus Factor	Distribution %	Sort No
✖	<input type="text"/>	<input type="text"/>	<input type="text"/>	Description 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	1
✖	<input type="text"/>	<input type="text"/>	<input type="text"/>	Description 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	2
✖	<input type="text"/>	<input type="text"/>	<input type="text"/>	Description 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	3
✖	<input type="text"/>	<input type="text"/>	<input type="text"/>	Description 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	4

Save Cancel

At the Grade Setup pop-up window you can either enter all the relevant information manually or if you have another grading range setup you can copy them over to this appraisal form.

Allow Moderation

Indicate whether employees' final grades for this appraisal will be moderated.

Review Cycle

Indicate the number of reviews that will be conducted for this appraisal. Each review has a period, and the next review commences on or after the review's start date only if the current review is completed. However, if you tick the "Allow user to switch review data." checkbox the users of this appraisal form can freely switch between any reviews that have commenced, regardless of whether the current or previous review has been completed, as long as the review has not ended.



Probation appraisals can have one review only.

Review Description

The description of the review.

Review Start Date

The start date of the review.

Review End Date

The end date of the review. After this date the review is deemed to have ended and can no longer be accessible.

Allow Self View

Allow appraisees access to this appraisal form during a specific review period.

Appraisers will always have access to the appraisees' appraisal forms.

Allow Self Score View

Allow appraisees to self-rate in the appraisal form during a specific review period.

If this is not ticked appraisers will rate for them.

Allow Self Appraisal

Allow appraisees to enter information into the appraisal form and submit the appraisal form for approval (self appraise) during a specific review period.

If this is not ticked appraisees will be appraised by appraisers without appraisees' input.



Allow Sup Direct Submission

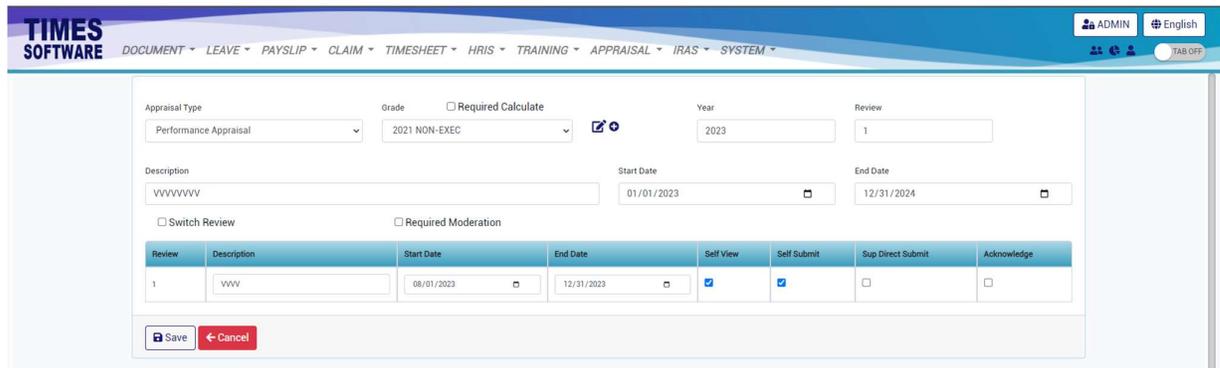
Allow appraisers, on behalf of the appraisee, to directly submit appraisee's appraisal form for review (without having to wait for appraisee to submit the appraisal form first) during a specific review period.

Acknowledge Required

If this is ticked, during a specific review period, after the last appraiser had approved the appraisee's appraisal form, the appraisee must acknowledge whether to accept or reject the appraisal. Only if the appraisee has accepted the appraisal can the appraisal be completed for that review period.

5.3.2 Editing Form Details

To edit your Form Details after you have saved it, click on the  button at the Form section in the Form Setup web page.

Review	Description	Start Date	End Date	Self View	Self Submit	Sup Direct Submit	Acknowledge
1	WWW	08/01/2023	12/31/2023	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Then make the necessary changes and click  button to save your changes or  button to cancel the changes.

5.4 Section

Sections are like pages in a hard copy appraisal form. A single page can contain all types of appraisal questions that appraisees can answer.

In the electronic appraisal form each section is a single tab in the web page. Here is an example:

The screenshot displays the 'Appraisal Form' interface. At the top, there's a navigation menu with options like 'DOCUMENT', 'LEAVE', 'PAYSIP', 'CLAIM', 'TIMESHEET', 'HRIS', 'TRAINING', 'APPRAISAL', and 'IRAS'. Below this, the 'Appraisal Form' section is visible, showing the employee name 'ANDY LOW' and the review type 'Review 2'. The 'Approval Flow' is listed as 'ANDY LOW >> BEN LIM >> DAVID GAN'. A 'Result Details' section contains five tabs labeled 'SECTION 1' through 'SECTION 5', with 'SECTION 1' highlighted in red. Below the tabs, the 'Review Goal Settings' are shown, including a goal description, a weight of 40, and a score of 4.00 for 'ANDY LOW'. A 'BEN LIM' box is also present with a 'Remark' field.

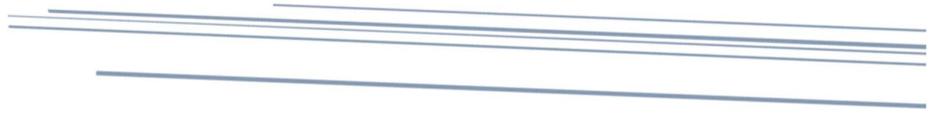
Let's start by creating a Section.

The screenshot shows the 'Form Detail' page. It features a list of sections represented by 'VVVVVVV' characters. At the bottom left, there is an 'Add Section' button with a pencil icon.

Click on the  logo to create a new section in the appraisal form.

The screenshot shows a configuration form for a 'Self define question'. At the top, there is a text area with the letter 'p' and a '1 words tiny' indicator. Below this, the 'Question Type' is set to 'Self define question' and the 'Sort No' is '0'. The 'VVV Profile' is set to 'Self-Define Mandatory All Access'. A 'Basic Settings' section contains the following fields: 'Score Group' (General Grade), 'Score bind as' (Max Score), 'Score display as' (Score), 'Control Line' (5), 'Min Weight' (0), and 'Max Weight' (100). At the bottom of the form are 'Save' and 'Cancel' buttons.

Enter the details into the Section and click  button to save your changes.



5.4.1 Understanding the Section Details

Here are the explanations for each of the functions in the Section Details web page.

Section Title

The title of the section which will be displayed in the tab of the appraisal form.

Weight

The section's total scores' weight percentage to determine the importance of this section's scores' contribution to the overall score of the appraisal.

All section's "Weight" in the appraisal form must add up to 100%.

Sort No

The sorting sequence of the section in the appraisal form. 0 is regarded as the first one.

Review

The number of reviews that will be conducted for this appraisal.

Section Detail Description

Description of the section for each review. Text entered here will appear in the appraisal form for users to read.

Allow View

Indicate whether this section is accessible by users during a specific review period. Ticked checkbox means yes.

To specify the specific user who can view the section is setup in the **Profile Access**.

Allow Score

Indicate whether users can rate in this section during a specific review period. Ticked checkbox means yes.

To specify the specific user who can rate is setup in the **Profile Access**.

Allow Weight

Indicate whether users can enter weightage in this section during a specific review period. Ticked checkbox means yes.

To specify the specific user who can enter weightage is setup in the **Profile Access**.



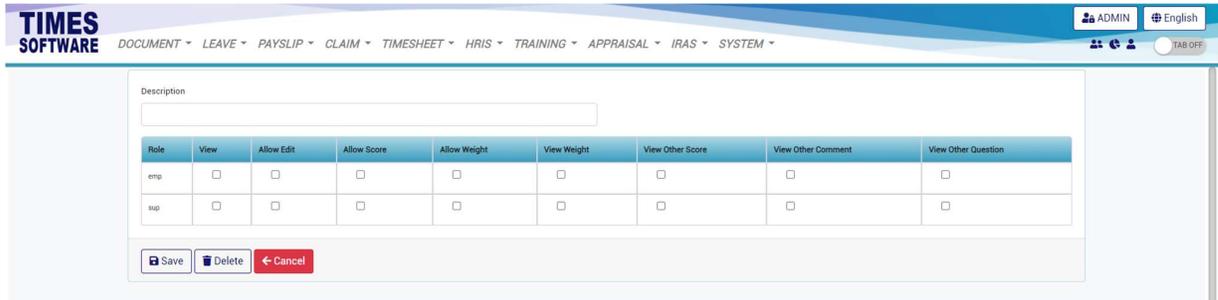
Profile Access

Determine what the users can do in this section. There is a pre-set list of standard access that you can use and they are:

Profile Access Name	Purpose
<i>Interim Review Pre-Define</i>	Users will not have access to the section for the review period.
<i>Interim Review Freefield</i>	Users will not have access to the section for the review period.
<i>Interim Review Self-Define</i>	Typically used during the start and mid review period of the appraisal. Users can enter weightage, however there will be no rating involved.
<i>Final Review Pre-Define</i>	Typically used during the last review period of the appraisal. Users can perform rating.
<i>Final Review Freefield</i>	Users can answer free form questions. No weightage and rating involved.
<i>Final Review Self-Define</i>	Typically used during the last review period of the appraisal. Users can enter weightage and perform rating.

Profile Access

However, if you wish to set up your own Profile Access click on the **View/Add** button to access the **Profile Details** pop-up window.



At the Profile Details pop-up window you can create a new Profile Access by clicking the  button.

Then enter the “Description” for the new profile, specify the access rights and click the  button to save the transactions.

To edit an existing profile, choose the profile from the “Description” drop-down list and click the



button. Make the necessary changes and click the



button to save the transactions.

To delete a profile, choose the profile from the “Description” drop-down list and click the



button.

5.4.2 Understanding the Section's Profile Access Details

This sub chapter explains the functions and purpose for each of the Profile Access Details fields.

Role

The type of user.

Employee refers to the appraisee and *Supervisor* refers to the appraiser.

Allow View

Indicate whether the user can access and view the section.

Allow Edit

Indicate whether the user can enter or select information in questions (such as goal settings, free form questions) for the section.

Allow Score

Indicate whether the user can rate.

Allow Weight

Indicate whether the user can enter weight percentages for self-define questions (such as goal settings) in the section.

View Weight

Indicate whether the user can view the weight percentage for questions in the section.

View Other Score

Indicate whether the user can view other users' selected rating for questions in the section, especially if there are more than one appraiser appraising the employee.

View Other Comment

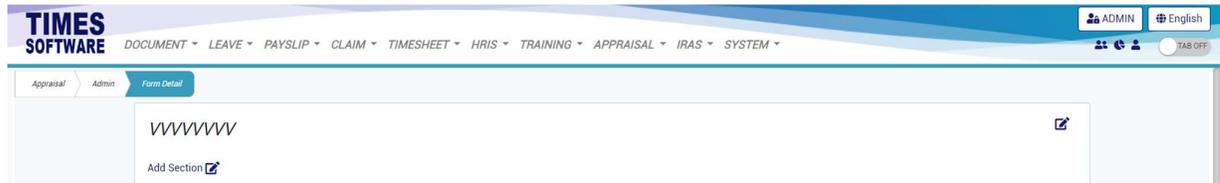
Indicate whether the user can view other users' comments.

View Other Question

Indicate whether the user can view other users' answers for the questions in the section.

5.4.3 Editing and Deleting the Section

To edit your Section after you have saved it, click on the  button at the Section in the Form Setup web page.

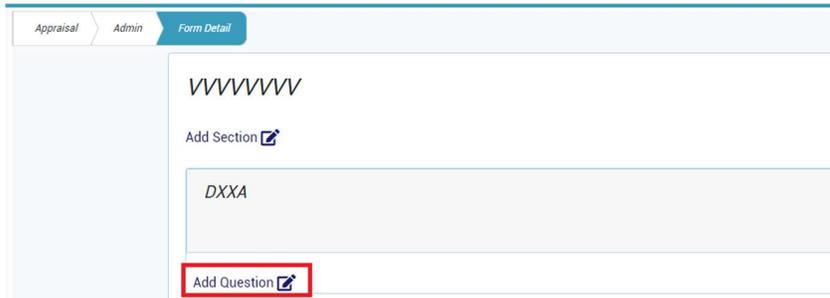


Then make the necessary changes and click  button to save your changes.

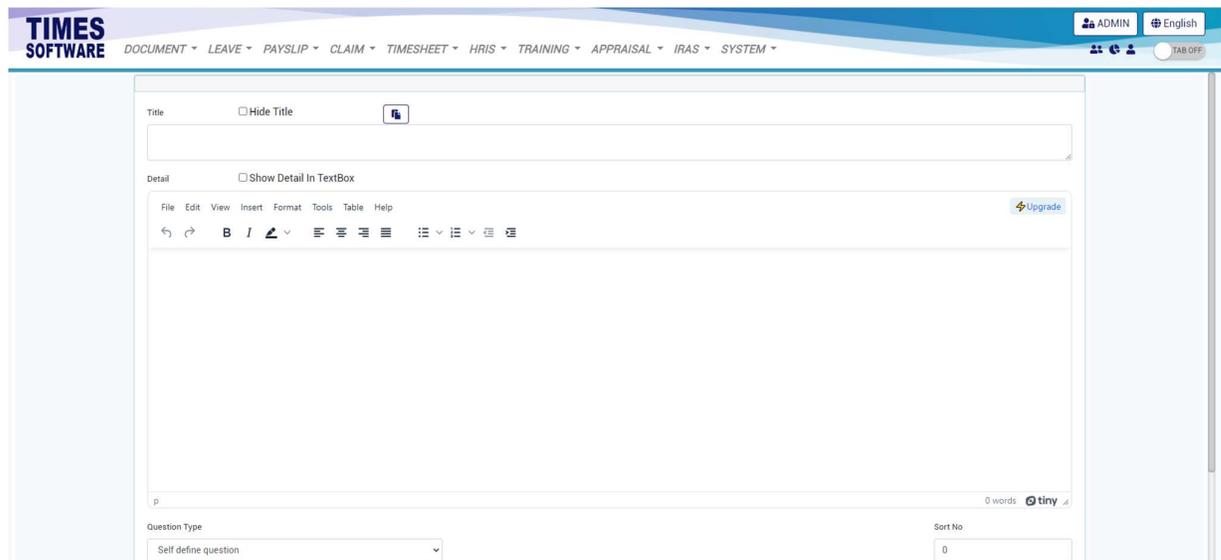
If you want to delete the Section, click on the  button.

5.5 Question

Once you have created your Section you can begin to create appraisal **Questions** in it.



Click on the Add Question hyperlink to create a new Question.



A Question comprises of up to three important components. The first component is the question type and the details of the question, second component involves the users' "Access" rights to the Question and the last component is to setup the rating scale, properties of the text box or values in a drop-down list or checkbox depending on the type of question created.

Once you have entered all the required details into the Question be sure to click  button to save your Question into the appraisal form.

Let's have a look at each of the Question's components.

5.5.1 Question Type and Details

Here are the explanations for each of the fields in the **Question Details** pop-up window that you need to setup first.

Question Type

Choose the type of Question that you are creating. The list of available types of Question are as follows:

Question Type	Typical Usage	Technical Notes
<i>Self Define Question</i>	This is usually used for Goal or KPI Setting where the appraisees and appraisers can enter their objectives and weightage for these objectives. Then each of these objectives are rated based on a rating scale.	Provides the Question with a multi-line text box, a weight percentage box and score drop-down list for user input. Needs to define a Score Group . The weightage entered for all Self Define Questions in a single Section must add up to 100%.
<i>Pre Define Question</i>	This is used to define a list of performance factors or a set of criteria that appraisees and appraisers can rate against.	Provides a score drop-down list for user to select for each Pre Define Question. No text can be entered. Needs to define a Score Group .
<i>Label</i>	This is used to display instructional text or announcement for users to read.	Shows the question as text on the web page. No user interaction and no Question's third component setup required.
<i>Text</i>	This is usually used as a short and simple free form question in which the users can provide a single line answer to the question.	Provides the Question with a single line text box for user input. Needs to define the length of the text box in pixel count.

Question Type	Typical Usage	Technical Notes
<i>Paragraph Text</i>	This is usually used as a free form discussion or feedback question where users can provide long answers to the question.	Provides the Question with a multi-line text box for user input. Needs to define the height and length of the text box in pixel count.
<i>Multiple Choice</i>	The Question provides a pre-set list of possible answers to the question where a user can just click on a radio button to choose <u>one</u> desired answer.	Provides the Question with multiple radio buttons containing answers to the question for user to select. User can choose one answer only. Needs to define the list of answers for the radio buttons and the length of the answers in pixel count.
<i>Checkbox</i>	The Question provides a pre-set list of possible answers to the question where a user can click on checkboxes to tick their desired answers.	Provides the Question with multiple checkboxes containing answers to the question for user to select. User can choose multiple answers. Needs to define the list of answers for the checkboxes and the length of the answers in pixel count.
<i>Choose from a List</i>	The Question provides a pre-set list of possible answers to the question where a user can click on drop-down list to choose <u>one</u> desired answer.	Provides the Question with a single drop-down list containing answers to the question for user to select. User can choose one answer only. Needs to define the list of answers for the drop-down list and the length of the drop-down list in pixel count.

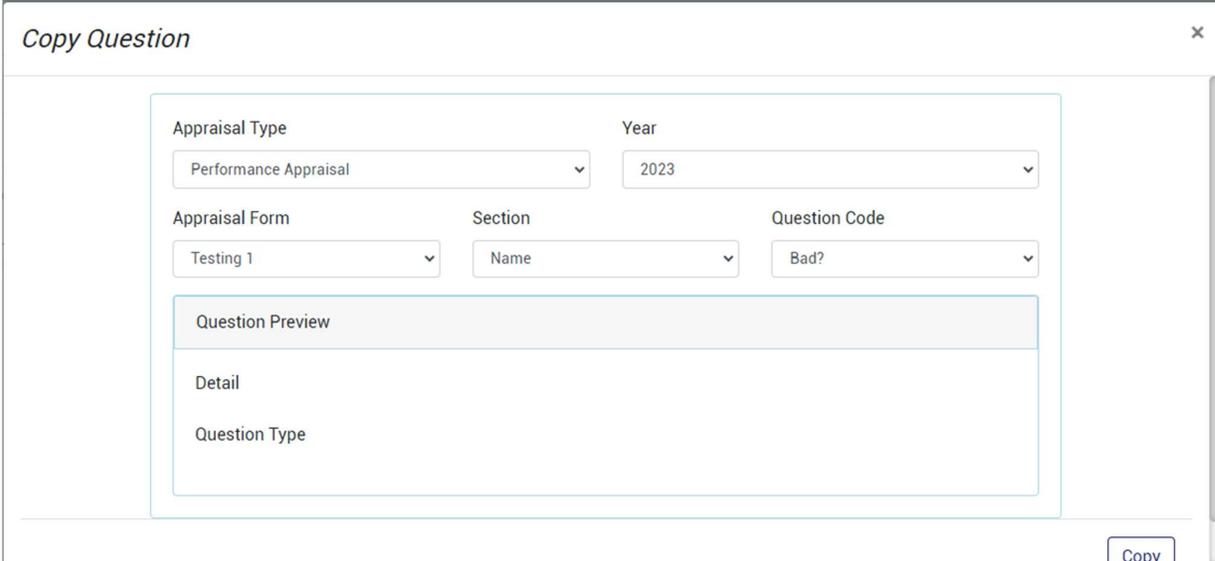
Question Title

This can be the appraisal question itself or the title of the appraisal question. Maximum 100 characters allowed. The “Question Title” will appear as bolded text in the appraisal form.

If the Question that you are creating exceeds 100 characters you can enter the question in the “Question Detail” instead. However you still need to enter the mandatory “Question Title” as a title to identify this question uniquely. This is useful for **Copy Question** as this function lists all available Questions that can be copied over by their titles.

You can click on the “Title hide in form?” checkbox to hide the “Question Title” from being shown in the live appraisal form.

If you have created some Questions before you can copy one of them over to this new Question. To do this click on the  button to access the **Copy Question** pop-up window.



At the Copy Question pop-up window make selections to the criteria such as “Type” and “Form” to retrieve the list of Questions that you want, and then choose the Question Title at “Question”. Click on the  button to copy the selected Question over to the new Question.



Question Detail

The appraisal question. Maximum 65,534 characters allowed.

Sort No

The sequence of the Question that will appear in the appraisal form. "Sort No" 0 is at the top most.

5.5.2 Question Access

Choose the “Access” to determine what the users can do for this Question. There is a pre-set list of standard access that you can use and they are:

Access for “Question Type” *Label, Text, Paragraph Text, Multiple Choice, Checkbox and Choose from a List.*

Question Access Name	Purpose
<i>Freefield Mandatory All Access</i>	All users can view and must answer the free form question.
<i>Freefield Mandatory SUPE-EMPH</i>	Only appraisers must view and answer the free form question and appraisee cannot view the free form question.
<i>Freefield Mandatory SUPE-EMPR</i>	Appraisers must view and answer the free form question and appraisee can only view the free form question with answer.
<i>Freefield Mandatory SUPR-EMPE</i>	Appraisee must view and answer the free form question and appraisers can only view the free form question with answer.
<i>Freefield Optional All Access</i>	All users can view and can choose whether to answer the free form question.
<i>Freefield Optional SUPE-EMPH</i>	Only appraisers can choose to view and answer the free form question and appraisee cannot view the free form question.
<i>Freefield Optional SUPE-EMPR</i>	Appraisers can choose to view and answer the free form question and appraisee can only view the free form question with answer.
<i>Freefield Optional SUPR-EMPE</i>	Appraisee can choose to view and answer the free form question and appraisers can only view the free form question with answer.



Access for “Question Type” *Pre-Define Question*

Question Access Name	Purpose
<i>Pre-Define Mandatory All Access</i>	All users must view and rate the criteria or performance factor.

Access for “Question Type” *Self-Define Question*

Question Access Name	Purpose
<i>Self-Define Mandatory All Access</i>	All users must view and enter their objectives or KPI, weightage and rating.
<i>Self-Define Optional All Access</i>	All users can choose to view and enter their objectives or KPI, weightage and rating.

5.5.3 Create New, Edit and Delete Question Access

You can create your own **Question Access**, edit or delete existing access. To do this click on the **+** button to access the **Profile Details** pop-up window.

Role	View	Allow Edit	Required	Allow Score	Allow Comment	Required Comment	View Other Score	View Other Comment
sup	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
emp	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

To create a new Question Access click on the **+** button. Enter the details of the new access and click **Save** button to save it.

To edit an existing Question Access choose one from the “Description” drop-down list and click the **✎** button. Make the necessary changes and click **Save** button to save it.

To delete an existing Question Access choose one from the “Description” drop-down list and click the **Delete** button.



Here are the explanations for each of the functions in the **Profile Details** pop-up window.

Description

The name of the Question Access.

Question Type

Determine the type of Question that this Access is catering for.

Role

The type of user. *Employee* is appraisee and *Supervisor* is appraiser.

Allow View

Ticked checkbox means the user can view the Question.

Allow Edit

Ticked checkbox means the user can answer the Question.

Required

Ticked checkbox means user must answer the Self-Define or Freefield¹-Define Question.

Allow Score

Ticked checkbox means user can rate the Self-Define or Pre-Define Question.

Allow Comment

Ticked checkbox means user can provide comments for the Self-Define or Pre-Define Question.

Required Comment

Ticked checkbox means user must provide comments for the Self-Define or Pre-Define Question.

¹ Freefield-Define Question (also known as Free Form Question) are either Question Type *Text*, *Paragraph Text*, *Multiple Choice*, *Checkbox* or *Choose from a List*.

Allow Weight

Ticked checkbox means user can enter weight percentage for the Self-Define Question.

View Weight

Ticked checkbox means user can view the weight percentage for the Self-Define Question.

Allow View Other Score

Ticked checkbox means user can view all users' score contributions to the Question.

Allow View Other Comment

Ticked checkbox means user can view all users' comments for the Question.

Allow View Other Question

Ticked checkbox means user can view all users' answers to the Question.

5.5.4 Score Group for Question Types Self-Define and Pre-Define

If you are creating a *Self-Define* or *Pre-Define Question* you must setup the rating scale for it in the **Score Group Basic Settings**.

Here are the explanations for each of the fields in the **Score Group Basic Settings**.

Score Group

This is the rating scale. Choose a “Score group” if you have one created. Click on the [Edit](#) hyperlink if you want to make changes to an existing “Score Group”.

If you want to create a new “Score Group” click on the [Add](#) hyperlink to access the **Score Details** pop-up window. *Refer to the next sub chapter for more information on the **Score Details**.*

Score bind as

Choose *Max Score* to list all the scores that can be calculated by the system for the Question starting from 1 to the largest value defined in the **Score Details**’ “Range Value”. For example, if the largest value in the Score Details’ “Range Value” is 8 then the list of scores will be *1,2,3,4,5,6,7,8*. For this selection the “Score display as” will always be set as *Score*.

Choose *Score Table* to list all the scores that can be calculated by the system for the Question based on the Score Details’ “Range Value”. For example, if the Score Details’ “Range Value” are 2, 5, 8 and 12 then the system will perform calculation based on those actual scores.

Score display as

This will determine the values that the users will see in their “Score” drop-down list when they want to rate the Question in the appraisal form.

“Score display as” *Score* displays the actual scores (either a range of scores if “Score bind as” is *Max Score* or the scores defined in Score Details’ “Range Value” if “Score bind as” is *Score Table*).

“Score display as” *Range* displays the list of values defined in Score Details’ “Range”.

Control line

The length of the “Score” drop-down list in pixel count.

Weight

If you are creating a Pre-Define Question you can indicate the weight percentage on the rating for this question.



Min Weight and Max Weight

For Self-Define Questions users can enter their weightage. Therefore you can define the minimum and maximum weight percentages that users are allowed to enter.

5.5.5 Score Details

+	Grade	From	To	Description	Increment Factor	Bonus Factor	Distribution %	Sort No
	<input type="text" value="x"/>	<input type="text" value="x"/>	<input type="text" value="x"/>	Description 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	1
	<input type="text" value="x"/>	<input type="text" value="x"/>	<input type="text" value="x"/>	Description 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	2
	<input type="text" value="x"/>	<input type="text" value="x"/>	<input type="text" value="x"/>	Description 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	3
	<input type="text" value="x"/>	<input type="text" value="x"/>	<input type="text" value="x"/>	Description 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	4

At the **Score Details** pop-up window enter the “Description” for the “Score Group”. If you want to copy an existing “Score Group” over to this one click on the button to access the **Copy Score** pop-up window. From the Copy Score pop-up window choose your “Score Group” and click button to copy the selected “Score Group” over to this new one.

Enter the remaining details for this “Score Group”. To add another row of record click on the Add hyperlink. To remove a row of record click on the record’s checkbox to select it and click on the Delete hyperlink.

Click on the button to save your transactions.

Here are the explanations for each of the functions in the **Score Details** pop-up window.

Description

The title of the “Score Group”.

Range

The title that represents the score. You can enter the title up to 10 characters maximum. For example the “Range” can be *A, B, C, D, E, or Excel, Good, Average, Subpar, Terrible*. Users can choose these when they perform their ratings if you set the “Score display as” as *Range*.

Range Value

The actual score.



Range Description

The description of the score.

Sort No

The sorting sequence of the score in the drop-down list.



5.5.6 Control Setup for Question Types Text and Paragraph Text

If you are creating a *Text* or *Paragraph Text Question* you can setup the height and length of the text boxes.

Control Line

The number of line rows of the text box that will determine the height of the box.

Control Width

The length of the text box in pixel count.

5.5.7 Setting up Values for the Question Type Multiple Choice, Checkbox and Choose from a List

If you are creating a *Multiple Choice*, *Checkbox* or *Choose from a List Question* you must setup the list of values that the user can choose from.

Basic Settings

Freefield text question.

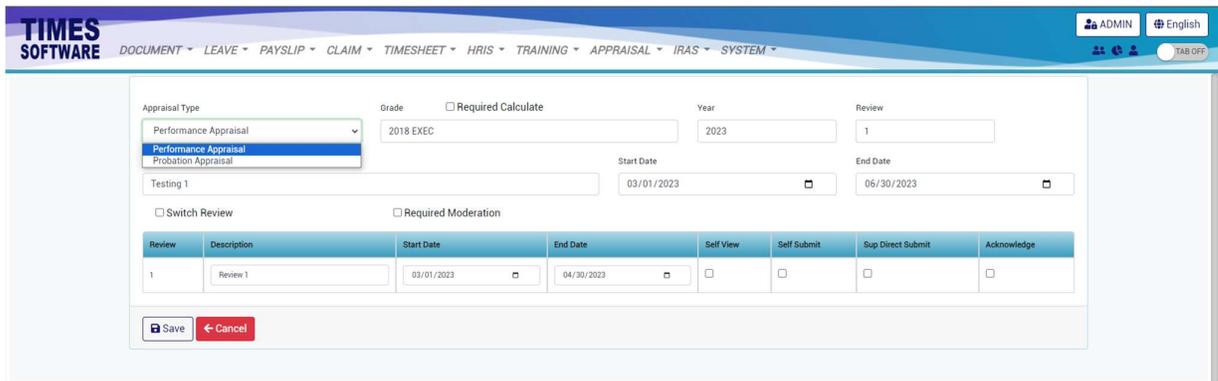
Control Width

0

5.6 Create a new Appraisal Form by Copying from another Form

You can create a new appraisal form by duplicating the details from another appraisal form.

To do this first choose the appraisal form that you want to copy and click on the  button at the **Form Setup** web page to access the form.



The screenshot shows the 'Form Setup' page for an appraisal form. The 'Appraisal Type' dropdown is set to 'Performance Appraisal'. The 'Grade' is '2018 EXEC', 'Year' is '2023', and 'Review' is '1'. The 'Start Date' is '03/01/2023' and the 'End Date' is '06/30/2023'. There are checkboxes for 'Switch Review' and 'Required Moderation'. Below these fields is a table with the following data:

Review	Description	Start Date	End Date	Self View	Self Submit	Sup Direct Submit	Acknowledge
1	Review 1	03/01/2023	04/30/2023	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

Click on the  button to start the copying process.

The **Form Details** pop-up window for the new appraisal form will be shown. Enter the details of the new appraisal form and click  button to create the form or  button to cancel the process.

5.7 Deleting an Appraisal Form

To delete an appraisal form first choose the form.

The screenshot shows the 'Form Setup' page with the following details:

- Appraisal Type: Performance Appraisal
- Year: 2023
- Form: Testing 1
- Table with columns: Scheme, Description
- Buttons: Add, Edit, Delete, Copy, Print

	Scheme	Description
	EXEC	EXECUTIVES
	N-EXEC	NON-EXECUTIVES

Then click on the  button.

5.8 Printing an Appraisal Form

To print an appraisal form into an excel document first choose the form.

The screenshot shows the 'Form Setup' page with the following details:

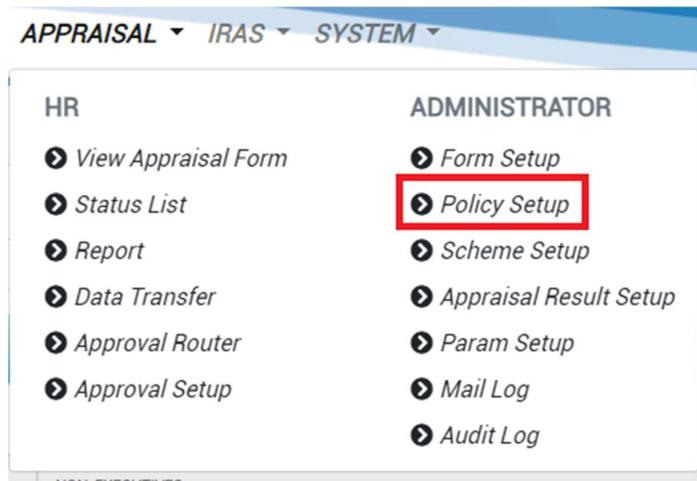
- Appraisal Type: Performance Appraisal
- Year: 2023
- Form: Testing 1
- Table with columns: Scheme, Description
- Buttons: Add, Edit, Delete, Copy, Print

	Scheme	Description
	EXEC	EXECUTIVES
	N-EXEC	NON-EXECUTIVES

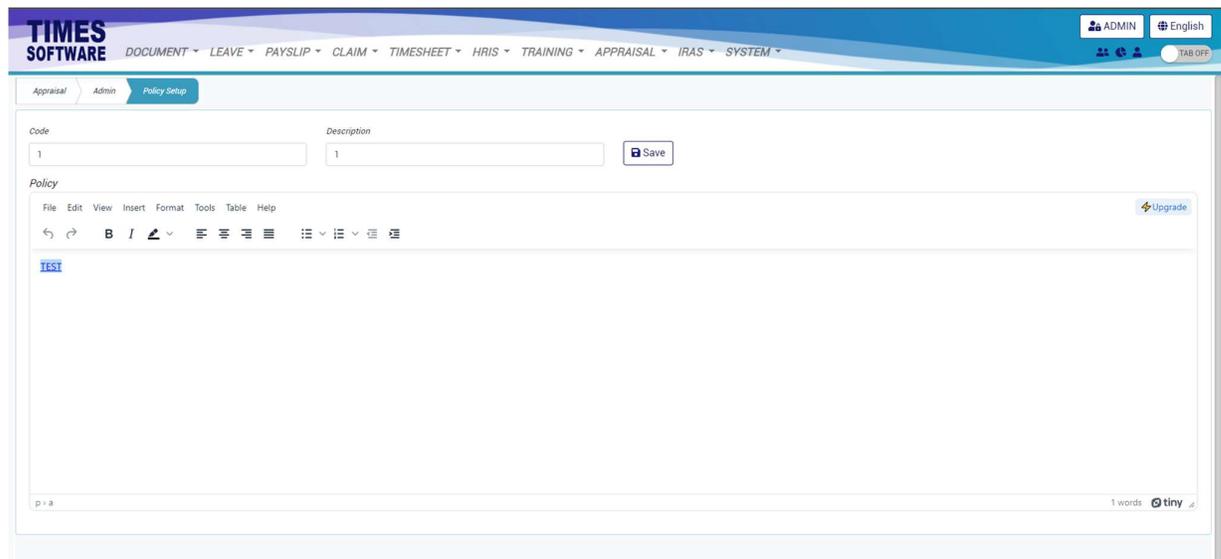
Then click on  button.

Chapter 6. Policy Setup

You can create and publish your organization's appraisal policy at the **Policy Setup** web page.



Click on the **Policy Setup** option in the Administrator menu to access the Policy Setup web page.



Enter the policy details and click  button to save and publish the policy.

- End of Document -
