



# TIMES Appraisal

Standard Setup and Maintenance  
User Guide for Administrators

## Disclaimer

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## Chapter 1. Introduction

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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.

## Product Support and Inquiries

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For technical assistance or inquiry on our products, please contact us via our hotline (65) **6295 1998**.

Alternatively, you can send us an email to the following email addresses:

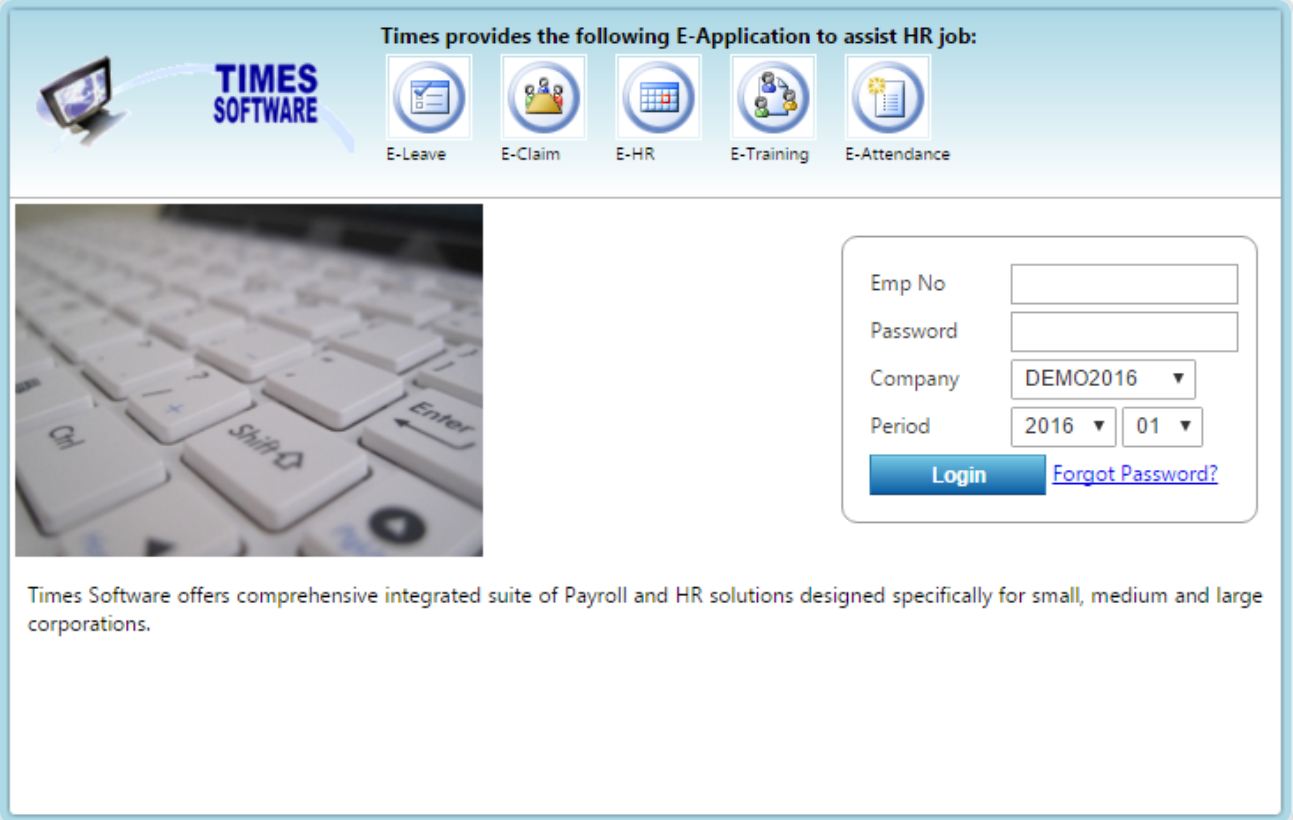
For support and assistance, please email to [support@timesoftsg.com.sg](mailto:support@timesoftsg.com.sg).

For product inquiry, please email to [sales@timesoftsg.com.sg](mailto:sales@timesoftsg.com.sg).

## Chapter 2. First time logging into the TIMES Appraisal

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

An example of the login page is shown below.



Times provides the following E-Application to assist HR job:

E-Leave E-Claim E-HR E-Training E-Attendance

Emp No

Password

Company

Period

[Login](#) [Forgot Password?](#)

Times Software offers comprehensive integrated suite of Payroll and HR solutions designed specifically for small, medium and large corporations.

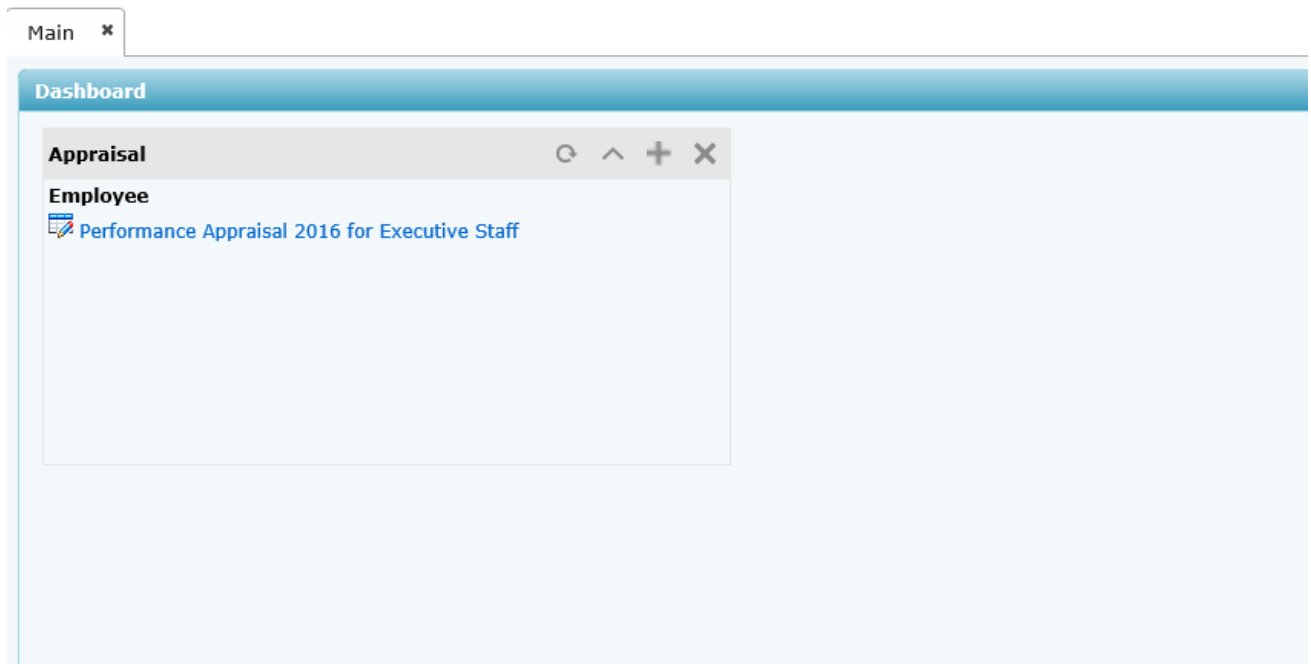
1. Click on the "Company" drop-down list to see a list of available companies and choose the one that you want to access to.
2. Key in your login id at "Emp No".
3. Key in your password at "Password".
4. Click the [Login](#) button to login into the system.



To effectively use this guide, ensure that you 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.

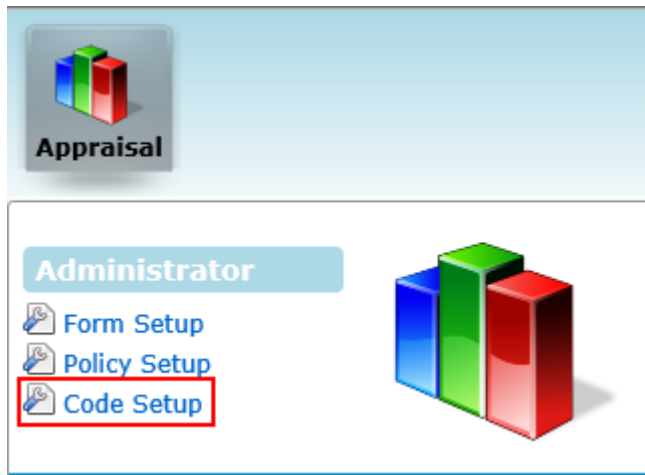


The dashboard shows you a list of items that require your attention.

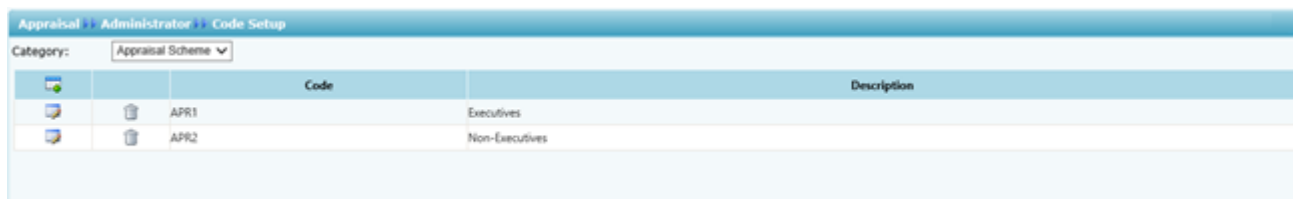
You can click on any of the items to access it.

## Chapter 4. Code Setup

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



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



Choose a "Category".

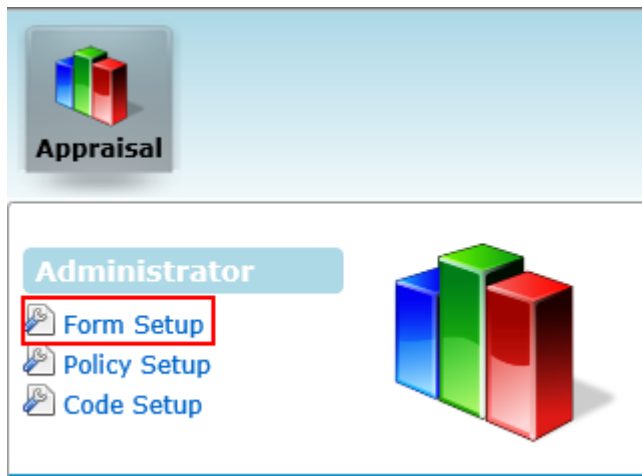
To add a new code, click on the button. Enter in the details for the new code and click button to save the code or button to cancel.

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

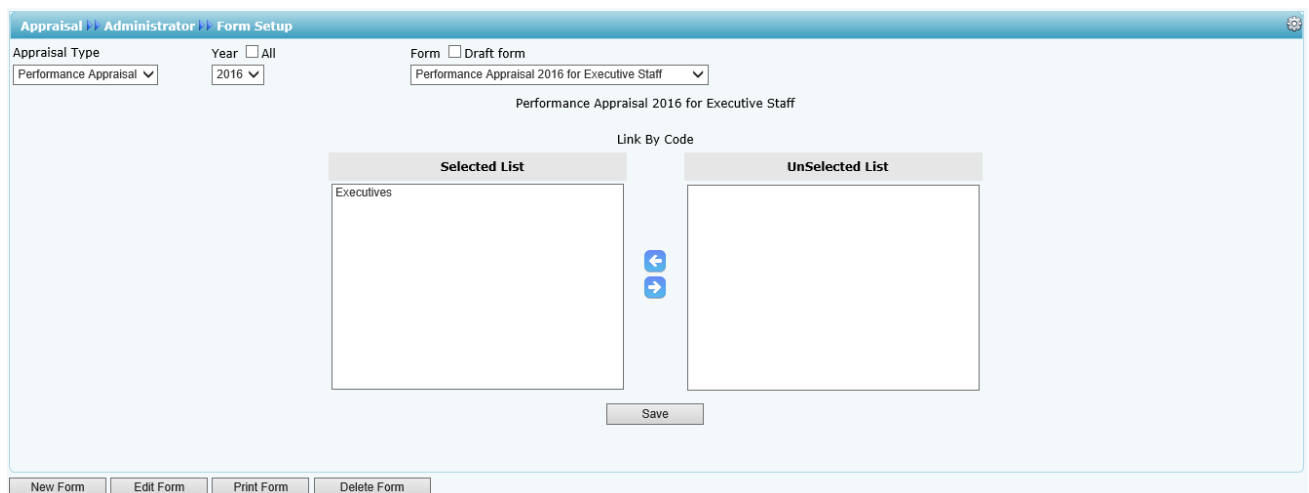
To delete a code, click on button. Codes deleted are unrecoverable.

## 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 **New Form** button.


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


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

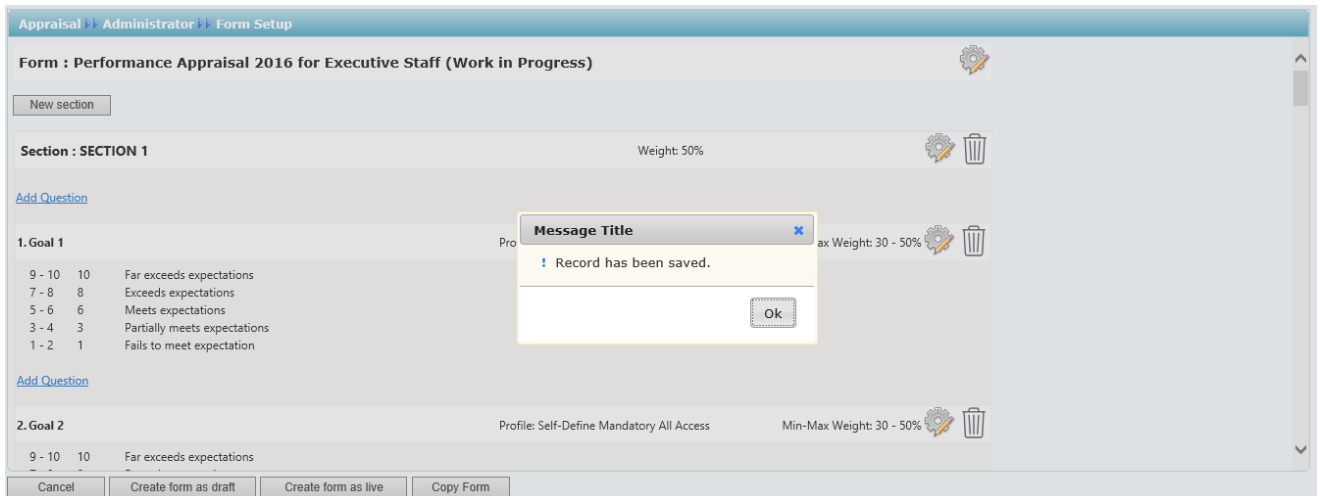
To delete an appraisal form, choose a “Form” and click on the **Delete Form** button. You can only delete an appraisal form if no users have used it yet.



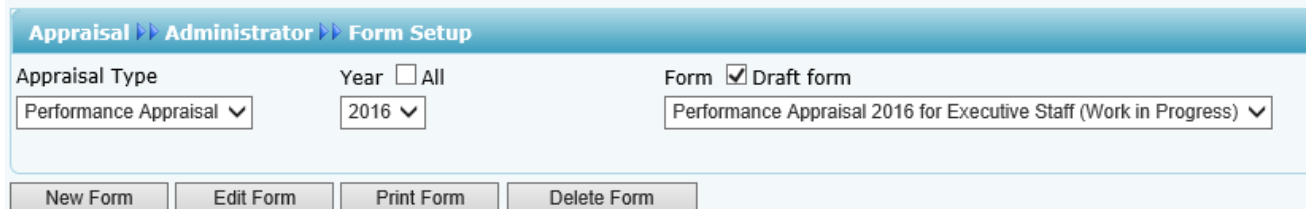
## 5.1 Saving the Appraisal Form as a Draft Copy

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.

To  save your appraisal form as a draft copy click on the **Create form as draft** button.



The screenshot shows the 'Appraisal Form Setup' window. A message box titled 'Message Title' is displayed in the center, stating 'Record has been saved.' with an 'Ok' button. The background window shows the 'Form : Performance Appraisal 2016 for Executive Staff (Work in Progress)' with various settings and a 'Create form as draft' button at the bottom.



The screenshot shows the 'Appraisal Form Setup' window. The 'Form' section has the 'Draft form' checkbox checked. The 'Appraisal Type' is set to 'Performance Appraisal' and the 'Year' is set to '2016'. The 'Form' dropdown is set to 'Performance Appraisal 2016 for Executive Staff (Work in Progress)'. The 'Edit Form' button is visible at the bottom.

To continue your work tick the ☒ "Draft Form" checkbox, choose your draft appraisal form and click on **Edit Form** button.

## 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.

Form Details

Type

Performance Appraisal

Form Title\*

Performance Appraisal 2016 for Executive Staff

Start/ End Date\*

01/10/2016

31/10/2016

Year\* 2016

Auto Calculate Grade\*

☒

Performance Executive Grade

Edit Add

Allow Moderation

☒

Allow moderation

Review Cycle\*

2

☒

Allow user to switch review data.

Review	Review Description*	Start Date*	End Date*	Allow Self View	Allow Self Score View	Allow Self Appraisal	Allow Sup Direct Submission	Acknowledge Required
1	Review 1	01/10/2016	30/11/2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Review 2	01/12/2016	31/12/2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

Cancel

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

Save

 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.

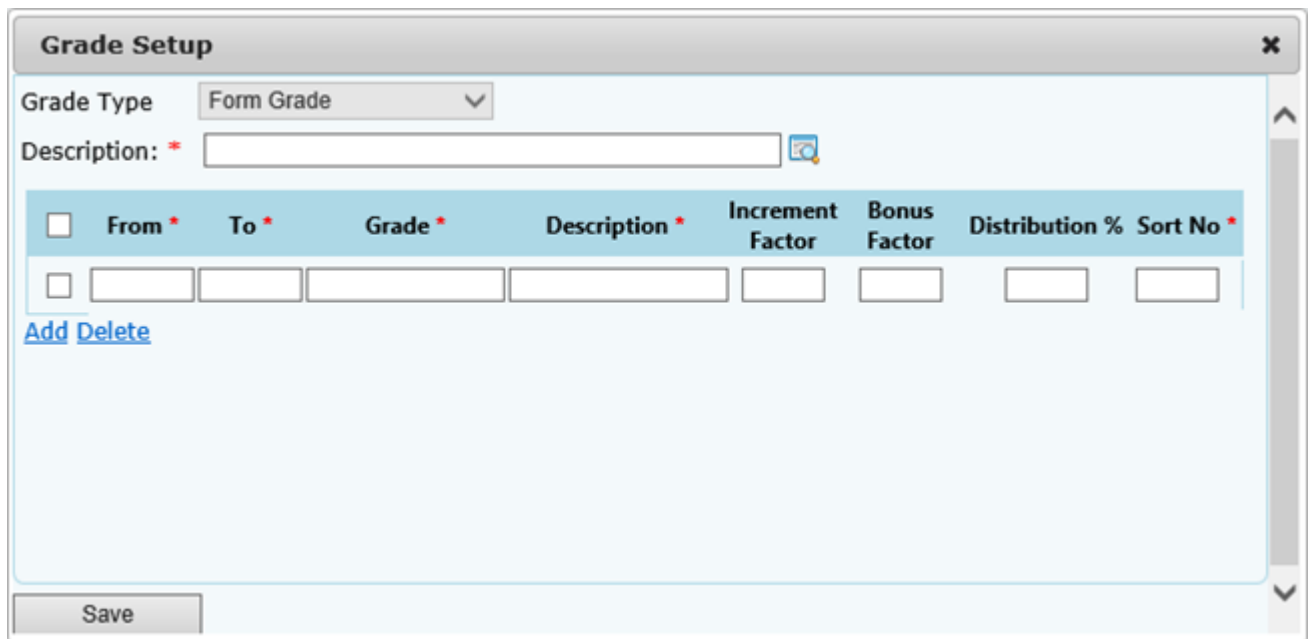
#### Year / Tag

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. To do this, click on the [Add](#) hyperlink to access the **Grade Setup** pop-up window.

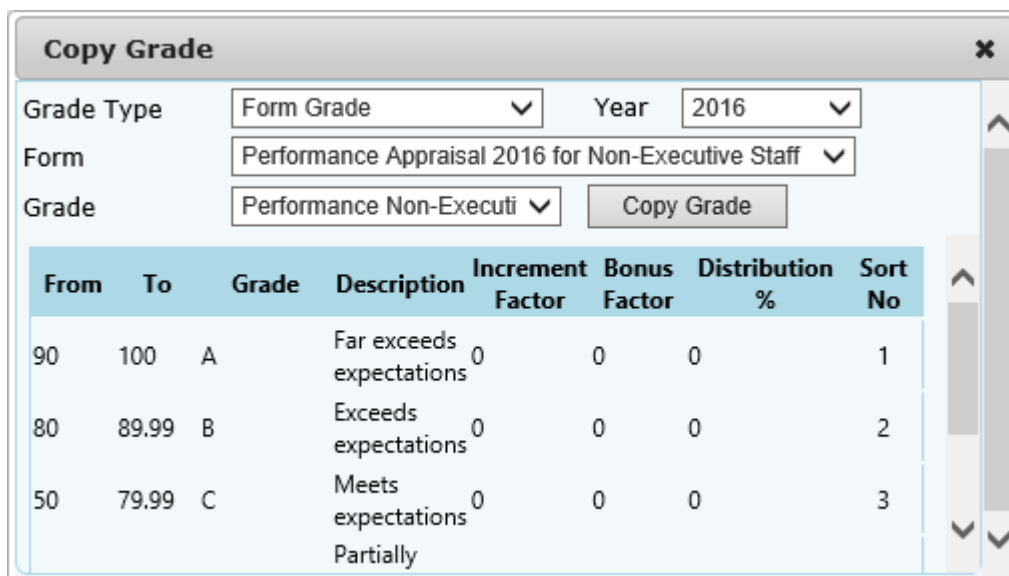


The **Grade Setup** window has a title bar with a close button. It contains a 'Grade Type' dropdown set to 'Form Grade'. Below is a 'Description:' label followed by a text input field and a search icon. A table with 9 columns is shown: From, To, Grade, Description, Increment Factor, Bonus Factor, Distribution %, and Sort No. The first row has empty input fields for the first four columns. Below the table are 'Add' and 'Delete' hyperlinks. At the bottom is a 'Save' button.

From *	To *	Grade *	Description *	Increment Factor	Bonus Factor	Distribution %	Sort No *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

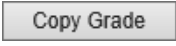
At the Grade Setup pop-up window you can either enter all the relevant information manually or if you have another grading range setup you can copy them over to this appraisal form.

To copy them click on the  button to search for them first in the **Copy Grade** pop-up window.



The **Copy Grade** window has a title bar with a close button. It contains 'Grade Type' (Form Grade), 'Year' (2016), 'Form' (Performance Appraisal 2016 for Non-Executive Staff), and 'Grade' (Performance Non-Executi). A 'Copy Grade' button is next to the Grade dropdown. Below is a table with 8 columns: From, To, Grade, Description, Increment Factor, Bonus Factor, Distribution %, and Sort No. The table contains three rows of data.

From	To	Grade	Description	Increment Factor	Bonus Factor	Distribution %	Sort No
90	100	A	Far exceeds expectations	0	0	0	1
80	89.99	B	Exceeds expectations	0	0	0	2
50	79.99	C	Meets expectations	0	0	0	3

Then click on the  button to copy them over to this appraisal form.

## Auto Calculate Grade

**Grade Setup**

Grade Type: Form Grade

Description: \* Performance Executive Grade

<input type="checkbox"/>	From *	To *	Grade *	Description *	Increment Factor	Bonus Factor	Distribution %	Sort No *
<input type="checkbox"/>	90	100	A	Far exceeds expecta	2	2	10	1
<input type="checkbox"/>	80	89.99	B	Exceeds expectation	1.5	1.5	20	2
<input type="checkbox"/>	50	79.99	C	Meets expectations	1	1	40	3
<input type="checkbox"/>	30	49.99	D	Partially meets expe	0.5	0.5	20	4
<input type="checkbox"/>	0	29.99	E	Fails to meet expecti	0	0	10	5

[Add](#) [Delete](#)

Save

To add additional grade, click on the [Add](#) hyperlink.

To delete a grade first choose ☒ the grade and click the [Delete](#) hyperlink.

To save your transactions click on the Save button.



To fully save your Grade Setup you must create the appraisal form as **draft** or **live**. If you cancel your appraisal form your Grade Setup will not be saved.



The “Distribution %” refers to the percentages of appraisees that would need to achieve a specific grade in order to achieve an ideal standard deviation or bell curve distribution (as your organization’s benchmark), and is only applicable if there is moderation of grades for this appraisal.



The “From” and “To” indicates the net total score range for the entire appraisal form.



“Increment” and “Bonus” factors are multipliers.

**Form Details**

Type: Performance Appraisal

Form Title\*: Performance Appraisal 2016 for Executive Staff

Start/ End Date\*: 01/10/2016 31/10/2016 Year\*: 2016

Auto Calculate Grade\*: ☒ Performance Executive Grade [Edit](#) [Add](#)

Allow Moderation: ☒ Allow moderation

Review Cycle\*: 2 ☒ Allow user to switch review data.

You can always edit your saved Grade Setup by clicking on the [Edit](#) hyperlink.

### 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.

Appraisal > Administrator > Form Setup

Form : Performance Appraisal 2016 for Executive Staff 

New section

Form Details

Type: Performance Appraisal

Form Title\*: Performance Appraisal 2016 for Executive Staff

Start/ End Date\*: 01/10/2016 31/10/2016 Year\*: 2016

Auto Calculate Grade\*: ☒ Performance Executive Grade [Edit](#) [Add](#)

Allow Moderation: ☒ Allow moderation

Review Cycle\*: 2 ☒ Allow user to switch review data.

Review	Review Description*	Start Date*	End Date*	Allow Self View	Allow Self Score View	Allow Self Appraisal	Allow Sup Direct Submission	Acknowledge Required
1	Review 1	01/10/2016	30/11/2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Review 2	01/12/2016	31/12/2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Cancel

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



Don't forget to save your appraisal form.

## 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:

Let's start by creating a Section.

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

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



Don't forget to save your appraisal form.

### 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**.

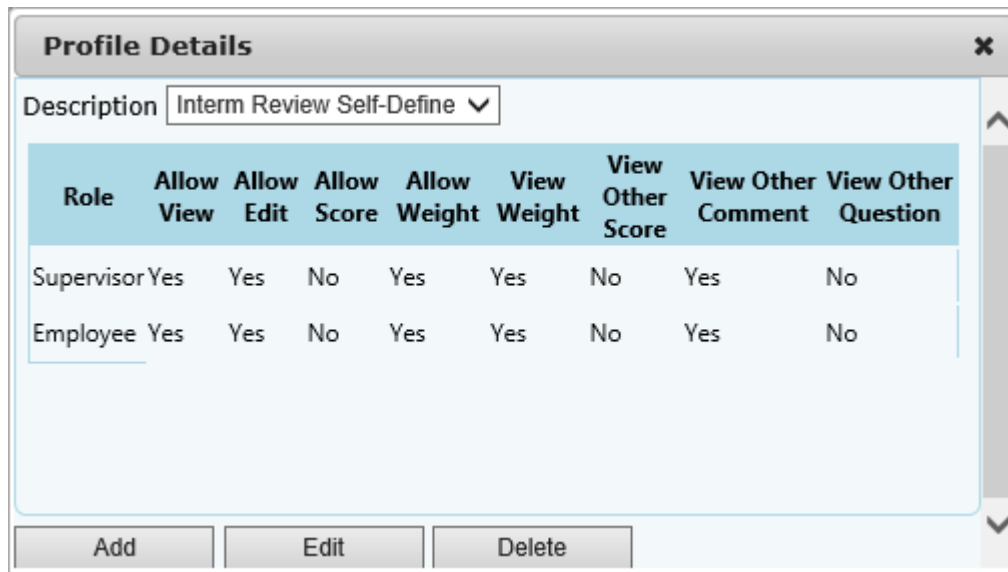
## Profile Access

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.



Role	Allow View	Allow Edit	Allow Score	Allow Weight	View Weight	View Other Score	View Other Comment	View Other Question
Supervisor	Yes	Yes	No	Yes	Yes	No	Yes	No
Employee	Yes	Yes	No	Yes	Yes	No	Yes	No

At the Profile Details pop-up window you can create a new Profile Access by clicking the **Add** button. Then enter the “Description” for the new profile, specify the access rights and click the **Save** button to save the transactions.

To edit an existing profile, choose the profile from the “Description” drop-down list and click the **Edit** button. Make the necessary changes and click the **Save** button to save the transactions.

To delete a profile, choose the profile from the “Description” drop-down list and click the **Delete** button.  Profiles deleted are unrecoverable.



Don't forget to save your appraisal form.

## 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.



The screenshot shows the 'Form Setup' interface for 'Performance Appraisal 2016 for Executive Staff'. It includes a 'New section' button, a list of sections (currently 'SECTION 1' with a weight of 50%), and an 'Add Question' link. The gear icon for editing and the trash icon for deleting are visible next to the section name.

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

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



Don't forget to save your appraisal form.

## 5.5 Question

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

Appraisal >> Administrator >> Form Setup

Form : Performance Appraisal 2016 for Executive Staff

New section

Section : SECTION 1 Weight: 50%

[Add Question](#)

Click on the [Add Question](#) hyperlink to create a new Question.

**Question Details**

Question Title  ☐ Title hide in form?

Question Detail

Question Type Self define question Access Freefield Mandatory All Access View/Add

Sort No

**Basic Settings**

User self define question.

Score group*	Score bind as	Score display as	Control line	Min Weight*	Max Weight*
<div></div> <a href="#">Edit</a> <a href="#">Add</a>	Max Score	Score	5	0	100

Save

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 Save button to save your Question into the appraisal form.



Don't forget to save your 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 <b>Score Group</b> .  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 <b>Score Group</b> .
<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

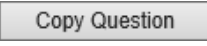
This can be the appraisal question itself or the title of the appraisal question. Maximum 100 characters allowed. The “Question Title” will appear as bolded text in the appraisal form.



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.

Profile Details

Description

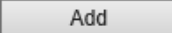
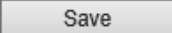
Self-Define Mandatory All Access

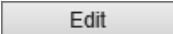
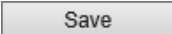
Role	Allow View	Allow Edit	Required	Allow Score	Allow Comment	Required Comment	Allow Weight	View Weight	Allow View Other Score	Allow View Other Comment
Supervisor	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes
Employee	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	No	Yes



Add

Edit

Delete

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

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

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 Freefield<sup>1</sup>-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.

### 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.

---

<sup>1</sup> 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 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**.

Basic Settings						
User self define question.						
Score group*	Score bind as	Score display as	Control line	Min Weight*	Max Weight*	
<input type="text"/> <a href="#">Edit</a> <a href="#">Add</a>	<input type="text" value="Max Score"/>	<input type="text" value="Score"/>	<input type="text" value="5"/>	<input type="text" value="0"/>	<input type="text" value="100"/>	

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

**Score Details**

Description: \*

<input type="checkbox"/>	Range *	Range Value *	Description *	Sort No *
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Add](#) [Delete](#)

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 list question.		Control width
<input type="radio"/> Option text 1	X	350
+		

Enter the values directly into the “Option Text”.

To add more values click on the **+** button.

To remove a value click on the **X** button.

## 5.6 Saving the Appraisal Form as Live

To publish the appraisal form for users' usage click on the **Create form as live** button.

After the appraisal form has been saved as a live copy you can then assign which appraisees to access the form.

To assign appraisees access to the form click on the appraisal scheme from the “UnSelected List” to highlight it and click on the button.

To remove access click on an appraisal scheme from the “Selected List” to highlight it and click on the button.

Click button to save your changes.

## 5.7 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 **Edit Form** button at the **Form Setup** web page to access the form.

Edit Form

Review	Review Description*	Start Date*	End Date*	Allow Self View	Allow Self Score View	Allow Self Appraisal	Allow Sup Direct Submission	Acknowledge Required
1	Review 1			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Review 2			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Click on the **Copy Form** 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 **Save** button to create the form or **Cancel** button to cancel the process.

## 5.8 Deleting an Appraisal Form

To delete an appraisal form first choose the form.

Appraisal Administrator Form Setup

Appraisal Type: Performance Appraisal Year: 2016 Form: ☐ Draft form Performance Appraisal 2016 for Executive Staff

Performance Appraisal 2016 for Executive Staff

Link By Code

Selected List	UnSelected List
Executives	APR1 APR2 Non-Executives

Save

New Form Edit Form Print Form **Delete Form**

Then click on the **Delete Form** button. Forms deleted are unrecoverable.



You can only delete unused appraisal forms.

## 5.9 Printing an Appraisal Form

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

Appraisal Administrator Form Setup

Appraisal Type: Performance Appraisal Year: 2016 Form: ☐ Draft form Performance Appraisal 2016 for Executive Staff

Performance Appraisal 2016 for Executive Staff

Link By Code

Selected List	UnSelected List
Executives	APR1 APR2 Non-Executives

Save

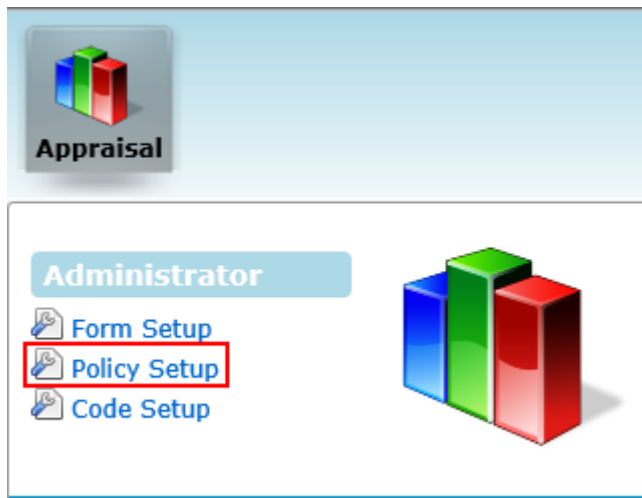
New Form Edit Form **Print Form** Delete Form

Then click on **Print Form** 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.

The screenshot shows the 'Policy Setup' web page. At the top, there is a breadcrumb trail: 'Appraisal > Administrator > Policy Setup'. Below this, there are two input fields: 'Code' and 'Description'. A rich text editor toolbar is visible, containing various icons for text formatting (bold, italic, underline, etc.), alignment, and insertion. The main area of the page is a large, empty text box for entering the policy details. At the bottom left, there is a 'Path:' label followed by a text input field. At the bottom center, there is a 'Save' button.

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