

TIMES Appraisal

User Guide for HR



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Chapter 1. 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.

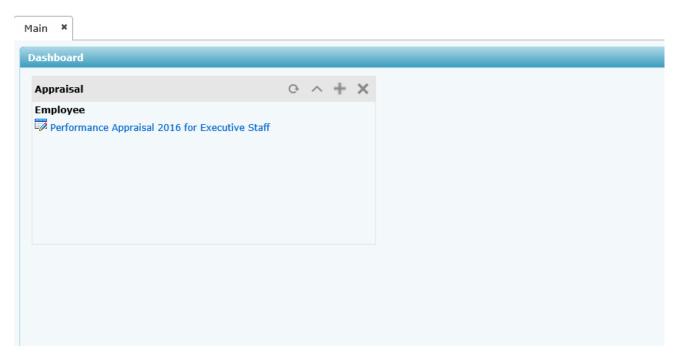


- 1. Click on the "Company" drop-down list to see a list of available companies and choose the one that you want to access to.
- 2. Key in your login id at "Emp No".
- 3. Key in your password at "Password".
- 4. Click the Login button to login into the system.



Chapter 2. 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 3. Approval Setup

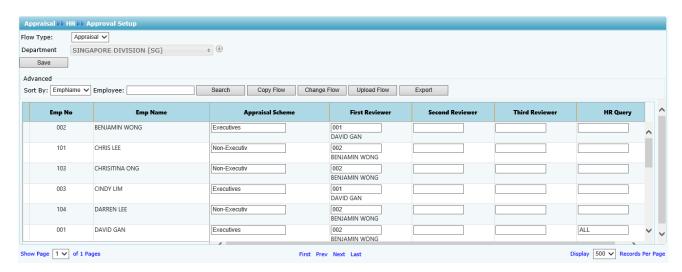
The **Approval Setup** function allows you as HR to setup the approval flow for each employee by indicating each employee's reporting supervisors as the employee's TIMES Appraisal appraisers.

These appraisers will be responsible in reviewing, approving, rejecting and contributing to their reporting employees' appraisal forms.

Additionally, you can designate the roles of HR to specific employees in this function.



Click on the **Approval Setup** option in the HR menu to access the Approval Setup web page.



At the Approval Setup web page, ensure the "Flow Type" is Appraisal.



Choose "Department" and a list of employees who are assigned to the selected department(s) will be shown on the web page. If you had made multiple selections, you can click button to see your selections.

Alternatively you can use the "Advanced Employee" search to retrieve a list of employees based on the text that you enter in it. This search will find the nearest matching employee number or name. Search

to see the results.

Navigating the Approval Setup 3.1

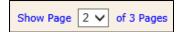
After you had entered the text in it, click

If your organization has a large number of employees, you will most likely have a large list of employees. To help you sort out and see the different web pages of records, you can use the following functions (they are located at the bottom of the web page):



Click on the "Display Records Per Page" dropdown list to choose the number of records that can be shown on the web page.

A maximum of 500 records can be shown on a single web page.



Click on the "Show Page" dropdown list to choose a specific web page of records.



Click on the "First", "Prev", "Next" or "Last" hyperlinks to navigate to each of the web pages if there are more than a single web page.



3.2 Setting up the Appraisal Approval Flow

To setup the approval flow, you need to key in the appraiser's employee number for each employee under the reviewer columns (they are called "First Reviewer", "Second Reviewer" and "Third Reviewer").



The system provides up to three levels of approval for each employee and these appraisers must be entered into the reviewer columns in a proper sequence. It's not mandatory to setup all three levels of approval.

For example, if an employee reports to a supervisor and the supervisor reports to the head of department, then the supervisor's employee number is setup at "First Reviewer" and the head of department's employee number is setup at "Second Reviewer" for the employee.

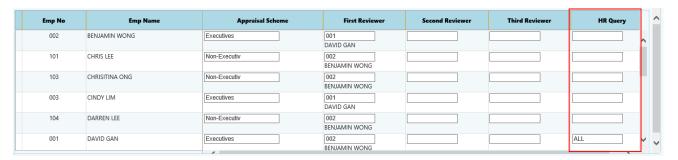
Once you have completed the entry, click the Save button. If you had entered the correct employee's number for the approvers, their names will appear on the web page. If not, just re-key in the correct employee number under the reviewer columns and click on the Save button.



3.3 Assigning the HR Role

The role of HR grants the employee access to the **HR** menu and HR can setup approval flow, manage appraisal information, perform moderation and manage employees' career progressions.

Before you can designate an employee as HR, you must have a **Query** created from TIMES Payroll application. The Query will determine the list of employees that this HR can have access to in order to manage their information.



To designate an employee as HR, enter the Query Name (<u>case sensitive</u>) at the "HR Query". Then click the Save button to save the entry.

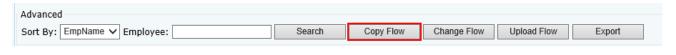
To remove the HR role from an employee, simply delete the Query Name at the "HR Query" and click the Save button.



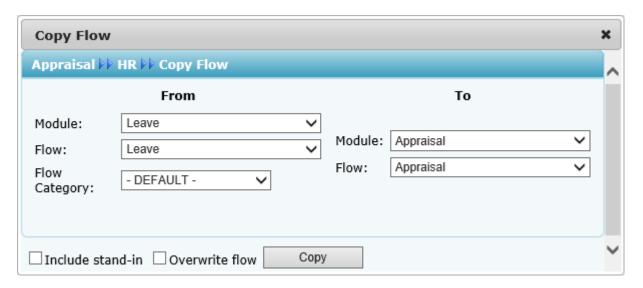
3.4 Automatic Setup of the Approval Flow

You can use this feature only if you have other TIMES Solution systems (such as TIMES Leave) installed otherwise skip this sub chapter.

You can quickly populate the list of approvers for each employee by using the Copy Flow button. This function transfers the list of approvers from one source location (such as from another system or module) over to this system.



Click on the Copy Flow button to access the Copy Flow pop-up window.



Choose the "Module" and "Flow" dropdown lists under the column **From** to indicate the source location where the system will copy the list of approvers from and choose the "Module" and "Flow" dropdown lists under the column **To** to indicate where this list will be copied over to.

On default the system will transfer the list of approvers for employees who do not have their approval flow setup information at the Approval Setup. If you wish to overwrite the employees' existing approval flow setup information click on the Overwrite flow checkbox to tick it.

Click Copy to initiate the process. You can still manually change the approvers for each employee after Copy Flow had been executed.



3.5 Easy Change of Approver

In the event you need to change an approver for many employees, you can use the Change Flow feature to easily perform that action without the need to manually change the approver for each employee.



Click on the Change Flow button to access the Change Flow pop-up window.



Enter the employee number of the approver that you want to change at "Supervisor" under the column **From** and the replacement approver at "Supervisor" under the column **To**.

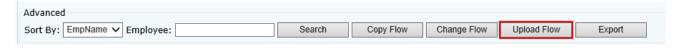
Ensure the "Flow" is *Appraisal* and click Change to proceed with the changes.

In this example, all employees who have the approver 001 will be replaced with approver 002.



3.6 Uploading Approval Flow into the system from Excel

If you like to prepare the approval flows in an excel document, you can use the system's excel template document to enter the approval flow information and upload them into the system by using the Upload Flow feature.



Click on the Upload Flow button to access the Upload Flow pop-up window.



First step is to download the system's excel template document. Click on the Template button at "Download Template" at Step 1 to download the document.

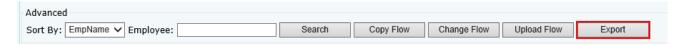
Next, open the excel template document and enter the approval flows into the document. Make sure to save the document.

Once done, proceed to Step 2 and click on Choose File to choose the completed excel document.

Finally, at Step 3, ensure the "Flow" is *Appraisal* and click the Upload button to upload the approval flow information from the selected excel document into the system.

3.7 Export the system's Approval Flow into an Excel document

You can export the system's approval flow into an excel document. To do so, first retrieve the list of approval flows and then click on the Export button.





Chapter 4. View Appraisal Form

You can view employees' appraisal forms.



Click on the **View Appraisal Form** option in the HR menu to access the View Appraisal Form web page and see employees' appraisal forms.



Chapter 5. Status List

You can view employees' appraisal status at the Status List web page.



Click on the Status List option in the HR menu to access the Status List web page.



Choose your search criteria such as "Department" and click on the Query button to retrieve the list of appraisees. If you had made multiple selections, you can click button to see your selections.

At the list of appraisees click on the ¹ button to see their appraisal result details.

Click on the would button to see the appraisee's appraisal form.

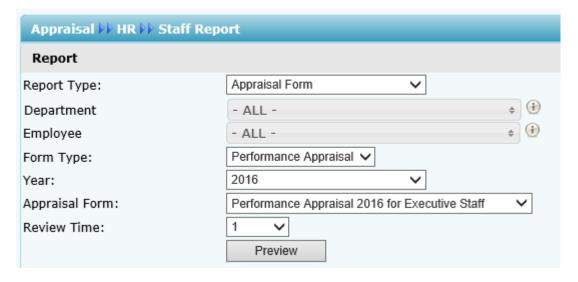


Chapter 6. Staff Report

You can access appraisal reports at the **Staff Report** web page.



Click on the Staff Report option in the HR menu to access the Staff Report web page.



Choose your "Report Type" and report criteria such as "Department". If you had made multiple selections, you can click button to see your selections.

Click on the Preview button to generate the report into an excel document.

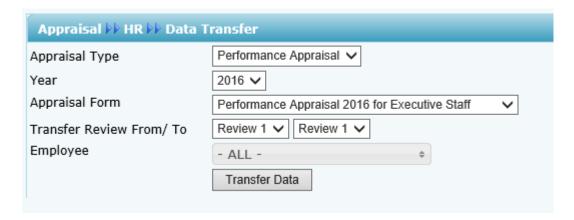


Chapter 7. Data Transfer

You can transfer appraisal data from one review period to another at the **Data Transfer** web page.



Click on the **Data Transfer** option in the HR menu to access the Data Transfer web page.



Choose your criteria and click on the Transfer Data button to start the transfer.



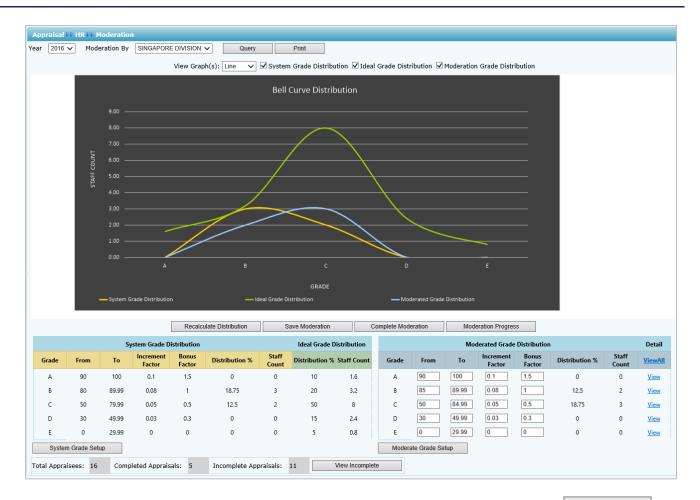
Chapter 8. Moderation

You can moderate appraisees' final appraisal grades at the **Moderation** web page.



Click on the **Moderation** option in the HR menu to access the Moderation web page.





At the Moderation web page choose "Year" and "Moderation By". Then click on the button to retrieve appraisal information.

If you want to export this page into an excel document click on the _____ button.

There are three key information that is displayed in this web page:

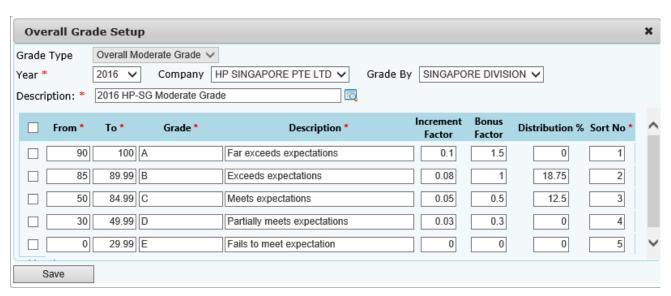
Grade Distribution Type	Meaning			
System Grade Distribution	Original appraisal grades that appraisees have earned and are calculated by the system after they have completed their appraisals.			
Ideal Grade Distribution	Percentages of appraisees that would need to achieve a specific grade in order to achieve an ideal standard deviation or bell curve distribution (as per your organization's benchmark)			
Moderated Grade Distribution	Appraisees' moderated grades by HR.			



First ensure the System Grades are correct. You can click on the System Grade Setup button to check and make amendments if required.

Next you can moderate appraisees' grades by shifting the score range of the appraisal grades or changing the grading system altogether. After that you can go further by fine tuning each appraisee's score by adding or subtracting it.

To do this click on the Moderate Grade Setup button to setup the moderated grading system.



Enter the details of the grading system and click Save button.

Moderated Grade Distribution								
Grade	From	То	Increment Factor	Bonus Factor	Distribution %	Staff Count	<u>ViewAll</u>	
Α	90	100	0.1	1.5	0	0	<u>View</u>	
В	85	89.99	0.08	1	12.5	2	<u>View</u>	
С	50	84.99	0.05	0.5	18.75	3	<u>View</u>	
D	30	49.99	0.03	0.3	0	0	<u>View</u>	
E	0	29.99	0	0	0	0	<u>View</u>	
Moderate Grade Setup								

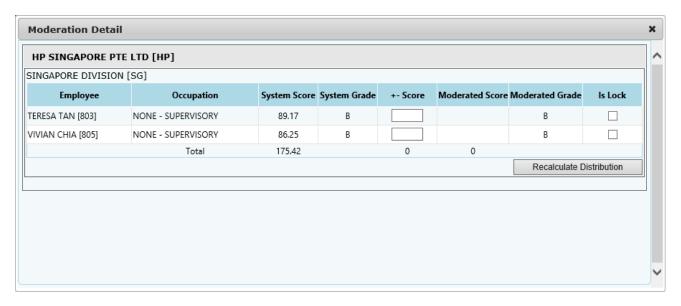
After the moderated grading system is setup, at the Moderation web page you can adjust the score range as many times as you like as long as you have not clicked on the Complete Moderation button to complete the moderation. After every adjustment made click on the

button to update the grade distribution percentages and the chart.

Click Save Moderation button to save your changes.



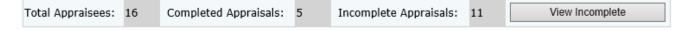
To see appraisees' scores click on the <u>ViewAll</u> or <u>View</u> hyperlinks.



At the Moderation Detail pop-up window you can fine tune each appraisee's score by adding (make sure you use the plus sign example +20) or subtracting (use the minus sign example -20) the score.

If you want to lock an appraisee's grade from being adjusted by score adjustment or grading system adjustment click on the "Is Lock" checkbox.

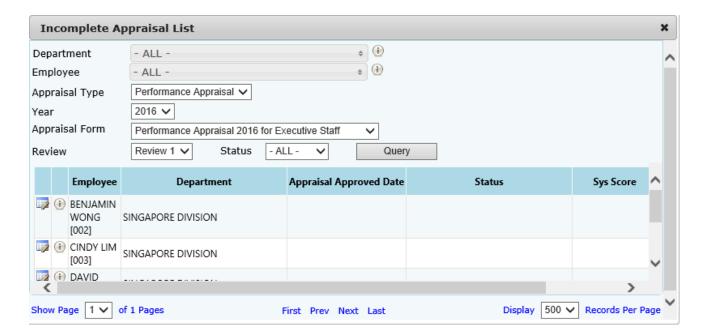
After you have completed the score adjustments click on the Recalculate Distribution button to update appraisees' grades, grade distribution percentages and the chart.



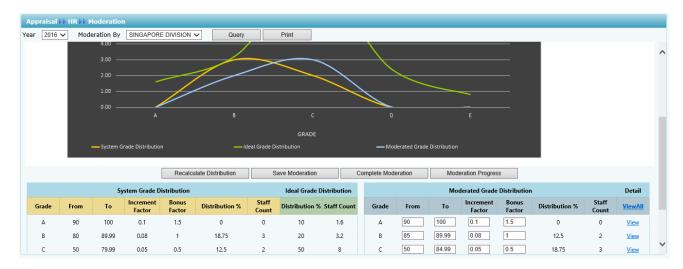
If there are incomplete appraisals you may want to check them out. Click on the

View Incomplete button to access the Incomplete Appraisal List pop-up window.





At the Incomplete Appraisal List pop-up window you can view the appraisees who have not commenced or completed their appraisals and the reason.



Back at the Moderation web page you can click on the Moderation Progress button to see the moderation progress of your organization.

Once you are ready to complete the moderation click on the Complete Moderation button.

Completed moderations can no longer be amended and the results can be published for appraisees' to view.

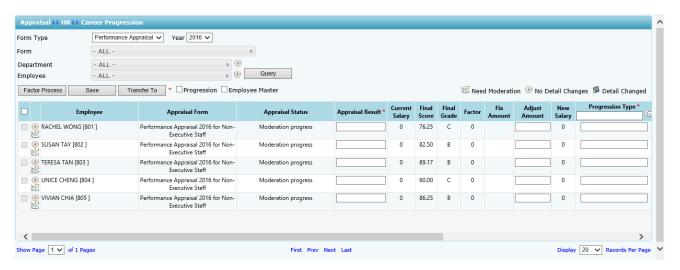


Chapter 9. Career Progression

You can manage employees' career progression based on appraisal results at the **Career Progression** web page.



Click on the **Career Progression** option in the HR menu to access the Career Progression web page.



At the Career Progression web page choose your search criteria such as "Form" and "Department" and click Query button to retrieve a list of appraisees based on your criteria. If you had made multiple selections, you can click button to see your selections.



You can manage the appraisees' increment factor by clicking on the Factor Process button.

Enter the details of the appraisees' career progression information and click Save button.

To transfer appraisees' updated career progression information here over to TIMES Payroll's employee record's career information without affecting payroll processing tick the Progression checkbox and click on the Transfer To button.

To transfer appraisees' updated salary information here over to TIMES Payroll for payroll processing tick the Employee Master checkbox and click on the Transfer To button.

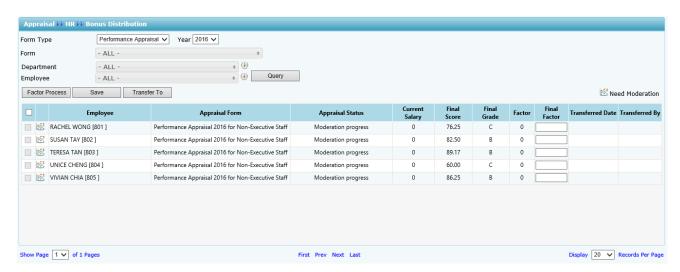


Chapter 10. Bonus Distribution

You can manage employees' bonuses based on appraisal results at the **Bonus Distribution** web page.



Click on the **Bonus Distribution** option in the HR menu to access the Bonus Distribution web page.



At the Bonus Distribution web page choose your search criteria such as "Form" and "Department" and click Query button to retrieve a list of appraisees based on your criteria. If you had made multiple selections, you can click button to see your selections.



You can manage the appraisees' bonus factor by clicking on the Factor Process button.

Enter the details of the appraisees' bonus information and click Save button.

To transfer appraisees' updated bonus information here over to TIMES Payroll for payroll processing click on the Transfer To button.



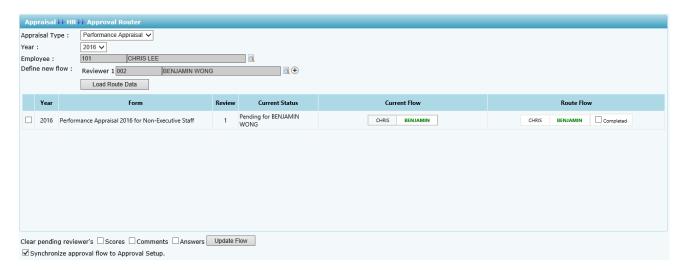
Chapter 11. Approval Router

The **Approval Router** is a powerful tool that allows HR to make changes on the appraisee's **Appraisal Form Status** (*Pending*, *Approved* and *Rejected*) as well as to change the appraisee's appraisal **Approval Flow** for his or her on-going appraisals.

It is important to note that you can only make changes to the employee's appraisal form status and approval flow using the Approval Router if the appraisee had submitted his or her appraisal form for the appraisal period. If the appraisee had not submitted any appraisal form for the appraisal period, the Approval Router will not show any records for this employee.



Click on the Approval Router option in the HR menu to access the Approval Router web page.





Choose your criteria such as "Appraisal Type" and "Year". Click on the utton to choose an appraisee. After you have selected an appraisee click on the Load Route Data You can change the approval flow of the appraisee. To change the reviewer click on the 🔯 button at the "Define new flow" to choose a different reviewer. If you want to add another reviewer click on the 🛨 button. If you do not want to this new approval flow to be updated to the Approval Setup uncheck the "Synchronize approval flow to Approval Setup." La checkbox. Then click the button to update the changes. Pending for BENJAMIN WONG ✓ 2016 Performance Appraisal 2016 for Non-Executive Staf CHRIS BENJAMIN Clear pending reviewer's Scores Comments Answers Update Flow ✓ Synchronize approval flow to Approval Setup. To change the status of the appraisee's appraisal form by routing the form back to a particular person click on the person's name at the "Route Flow". Make sure to click on the appraisal form's Update Flow checkbox to select it. Then click the button to update the changes. To mark the appraisal as completed click on the "Completed" to tick it (or vice versa) and Update Flow button to update the changes. click the To remove reviewer's scores, comments and answers tick on their respective checkboxes at the

Update Flow

button to update the changes.

"Clear pending reviewer's" and click the



That's it!

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