

GroSum

Quick Guide

Goal Setting by Appraiser

1. Appraiser receives email that employee has submitted goals and can now review the goals.
2. Appraiser logs into PMS & goes to dashboard.

Sign In

Admin

.....

Where do you want to start from today?

My Tasks

? Forgot Password

Login



login into PMS

Go to the Dashboard

Review 2017-18 ▾

Change Review Cycle

Dashboard

Review Status

My Tasks

All Reviews

My Reports

Unlock

Home

Mary ▾

Review for the period: 01 Apr 2017 - 31 Mar 2018

Goals

I need to set my goals

Go

My Manager is waiting for my signoff

Done

Reviewees

2 Reviewee(s) are still setting their goals

I am waiting for my Reviewee(s) signoff

Done

Appraisal (Due by 01 Mar 2017)

★★★★☆

My Review

Awaiting Goals Sign Off

★★★★☆

Reviewees

2 Reviewee(s) still doing Self Review

Awaiting 2 Reviewee(s) Sign Off of Self review

Awaiting Reviewer(s) Sign Off of 2 review(s)

Awaiting 2 Review Sign Off for acceptance

Done

- 3. Under Goal Settings, Appraiser sees a red link – I have to set goals for reviewees – GO
- 4. Appraiser clicks the link to set goals for the employee.

Click link to set goals for the employee

Review 2017-18

Mary

Dashboard

Review for the period: 01 Apr 2017 - 31 Mar 2018

Goal Settings (Due by 31 Mar 2018)

My Goals

I need to set my goals

Go

My Manager is waiting for my signoff

Done

Reviewees

2 Reviewee(s) are still setting their goals

I am waiting for my Reviewee(s) signoff

Done

Appraisal (Due by 01 Mar 2017)

★★★★☆

My Review

Awaiting Goals Sign Off

★★★★☆

Reviewees

2 Reviewee(s) still doing Self Review

Awaiting 2 Reviewee(s) Sign Off of Self review

Awaiting Reviewer(s) Sign Off of 2 review(s)

Awaiting 2 Review Sign Off for acceptance

Done

5. In the Goal Setting screen, on the left hand menu, Appraiser can see the list of employees whose goals have to be finalized by the Appraiser. The Appraiser can see the status too – whether employee has submitted or not. The Appraiser selects the employee for whom goal setting has to be done.
6. The screen refreshes & Appraiser can see the goals, weightages, details and targets (if applicable) as set by the employee.
7. The Appraiser can modify weightage, details and targets for goals. The Appraiser can also delete a goal, if not required and click on SAVE

Select Employee

Modify weightage
and targets

The screenshot shows the 'Set Ron Weasley's Goal & Competencies' interface. On the left, a sidebar lists employees: 'Hermione Granger' and 'Ron Weasley' (highlighted with a red box). The main area displays two goals for Ron Weasley. The first goal is 'Support marketing team in efforts towards brand creation' with a weightage of 50.0%. The second goal is 'Review meeting with all stakeholders' (highlighted with a red box) with a weightage of 50.0%. The 'Target' field for the second goal is also highlighted with a red box. At the bottom, there are 'Save' and 'Sign Off' buttons. The 'Save' button is highlighted with a red box. A red arrow points from the 'Save' button to the text 'Click on SAVE'.

Review 2017-18 ▼ Set Ron Weasley's Goal & Competencies View History Mary ▼

Type & Search Emp. Name: 2 Reviewee(s) Hermione Granger Ron Weasley Showing 1 to 2 of 2 entries

Showing Goal (50.0 %) - Competencies (50.0 %) Set Common Choose Add New

x Support marketing team in efforts towards brand creation Financial 50.0 %

Objective Measure:

x Review meeting with all stakeholders Internal Process Target 50.0 50.0 %

Objective Measure:

2 Open, 0 Completed Save Sign Off Click Sign Off to finalize Performance Measures for the Review

Click on SAVE

Delete a goal, if not required

8. The screen refreshes and shows the goals with changes updated.
9. The Appraiser can choose to select another goal from the library by clicking on CHOOSE. A window automatically opens and shows a list of goals that employee can choose from.

Click on Choose

Review 2017-18 ▼ Set Ron Weasley's Goal & Competencies View History Mary ▼

Type & Search Emp. Name:

2 Reviewee(s) ▲ ▼

Hermione Granger -

Ron Weasley -

Showing 1 to 2 of 2 entries

Showing Goal (50.0 %) - Competencies (50.0 %) Set Common Choose Add New

☒ Support marketing team in efforts towards brand creation Financial 50.0 %

Objective Measure:

☒ Review meeting with all stakeholders Internal Process Target 50.0 50.0 %

Objective Measure:

2 Open, 0 Completed Save Sign Off Click Sign Off to finalize Performance Measures for the Review

10. Appraiser can select a goal & set a weightage for each goal and click SAVE

Select a goal & set a weightage for each goal

Review 2017-18 ▾ Set Ron Weasley's Goal & Competencies View History Mary ▾

Type & Search Emp. Name:

Showing Goal (50.0 %) - Competencies (50.0 %) Set Common Choose Add New

2 Reviewee(s)

Hermione Granger

Ron Weasley

Showing 1 to 2 of 2 entries

Choose Goals Library | Current goals X

for Ron Weasley ▾

Goal | Competencies

Financial (1 Assessment Areas)	0%
<input checked="" type="checkbox"/> Support marketing team in efforts towards brand creation	20 %
Internal Process (1 Assessment Areas Checked)	0%
<input checked="" type="checkbox"/> Review meeting with all stakeholders	0 %
<input checked="" type="checkbox"/> Organise SI Testing Review meeting with all stakeholders	0 %
<input checked="" type="checkbox"/> Maintaining Hand-over documents up-to-date	0 %
<input checked="" type="checkbox"/> Adhere to company policies	0 %
<input checked="" type="checkbox"/> Face Internal and External Quality Audits	0 %
<input checked="" type="checkbox"/> Provide technical inputs to Documentation team for revision of manuals	0 %

Save

2 Open, 0 Completed

Save Sign Off Click Sign Off to finalize Performance Measures for the Review

Click on SAVE

11. The screen refreshes and shows the goals with weightages that Appraiser has added from goal library
12. The Appraiser can add details in the text boxes for the goals and SAVE
13. If the Appraiser wants to create a new goal, not currently available in library, the button ADD NEW can be clicked that will open a new window to create a goal.

Add details in the text boxes

Click Add New to create a goal

Review 2017-18 ▼ Set Ron Weasley's Goal & Competencies View History Mary ▼

Showing Goal (50.0 %) - Competencies (50.0 %) Set Common Choose Add New

Support marketing team in efforts towards brand creation Financial 25.0 %

Objective Measure:

Review meeting with all stakeholders Internal Process Target 30.0 50.0 %

Objective Measure:

Face Internal and External Quality Audits Internal Process Target 20.0 25.0 %

Objective Measure:

2 Open, 0 Completed Save Sign Off Click Sign Off to finalize Performance Measures for the Review

14. Appraiser can add the goal & if there is a similar goal present in the library, the tool provides auto suggestions to select one of those rather than create a new goal.
15. If Appraiser selects a suggestion, then that goal is added for the employee & shown on the screen after the screen is refreshed.
16. If Appraiser chooses to create a new goal, then the goal is created and also added for the employee & shown on the screen after the screen is refreshed. Further this goal can be edited to make further changes by the employee.
17. Appraiser can add targets for measurable goals. Click NEXT.

Add goals

Add targets for measurable goals.

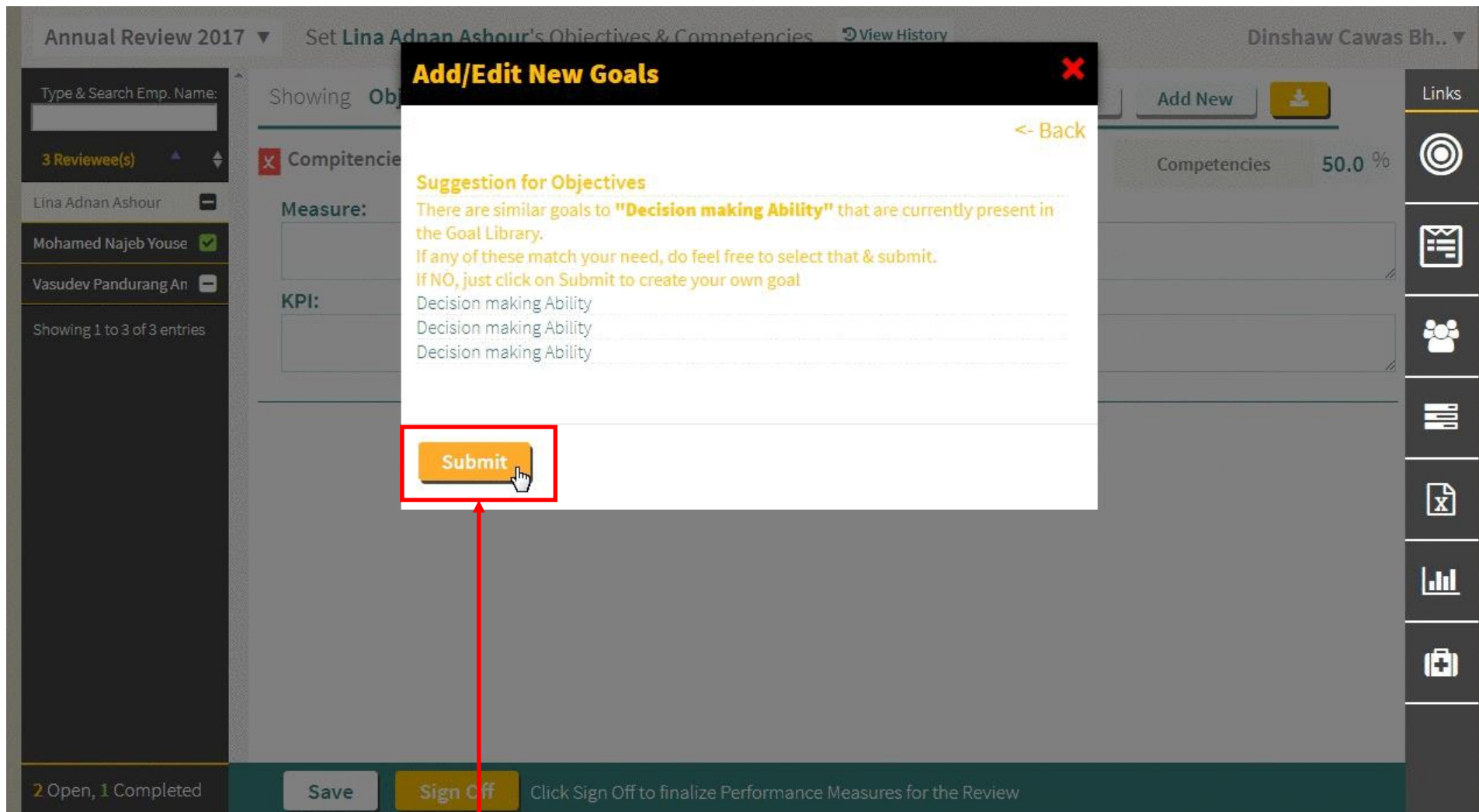
The screenshot shows a web application interface for performance reviews. A modal window titled "Add/Edit New Goals" is open, allowing the user to create a new goal. The modal has a dark header with a close button (X). The main content area is white and contains the following fields:

- Goal | Competencies**: A section header.
- Can't find goals from the library? Create your specific goals here.**: A prompt.
- Type:**: A dropdown menu with "Measurable" selected.
- Perspective:**: A dropdown menu with "Customer" selected.
- Goal:**: A text input field containing "Revenue Management".
- Objective Measure:**: A text input field.
- For**: A section with two checkboxes and names: "Hermione Granger" (checked) and "Ron Weasley" (checked).
- Next**: A yellow button at the bottom of the modal.

Red arrows point from the text annotations to the "Measurable" dropdown, the "Revenue Management" text field, and the "Next" button. The background shows a sidebar with employee names (Hermione Granger, Ron Weasley) and a main area with a table of goals and competencies.

Click on NEXT

18. Once done, the Appraiser can click SUBMIT to complete the goal setting process. No further changes can be done by the Appraiser.



Click on SUBMIT

19. Email alert is sent to Employee that Appraiser has submitted the goals and now, employee can view finalized goals.

Review 2017-18

Set Ron Weasley's Goal & Competencies

View History

Mary

Type & Search Emp. Name:

2 Reviewee(s)

Hermione Granger

Ron Weasley

Showing 1 to 2 of 2 entries

Showing

Goal (50.0 %)

- Competencies (50.0 %)

Set Common

Choose

Add New

Revenue Management

Customer

Target

20.0

25.0 %

Objective Measure:

Support marketing team in efforts towards brand creation

Financial

25.0 %

Objective Measure:

Review meeting with all stakeholders

Internal Process

Target

20.0

25.0 %

Objective Measure:

Face Internal and External Quality Audits

Internal Process

Target

20.0

25.0 %

Objective Measure:

2 Open 0 Completed

Save

Sign Off

Click Sign Off to finalize Performance Measures for the Review

Click on Sing Off

GroSum

You are an Expert Now

