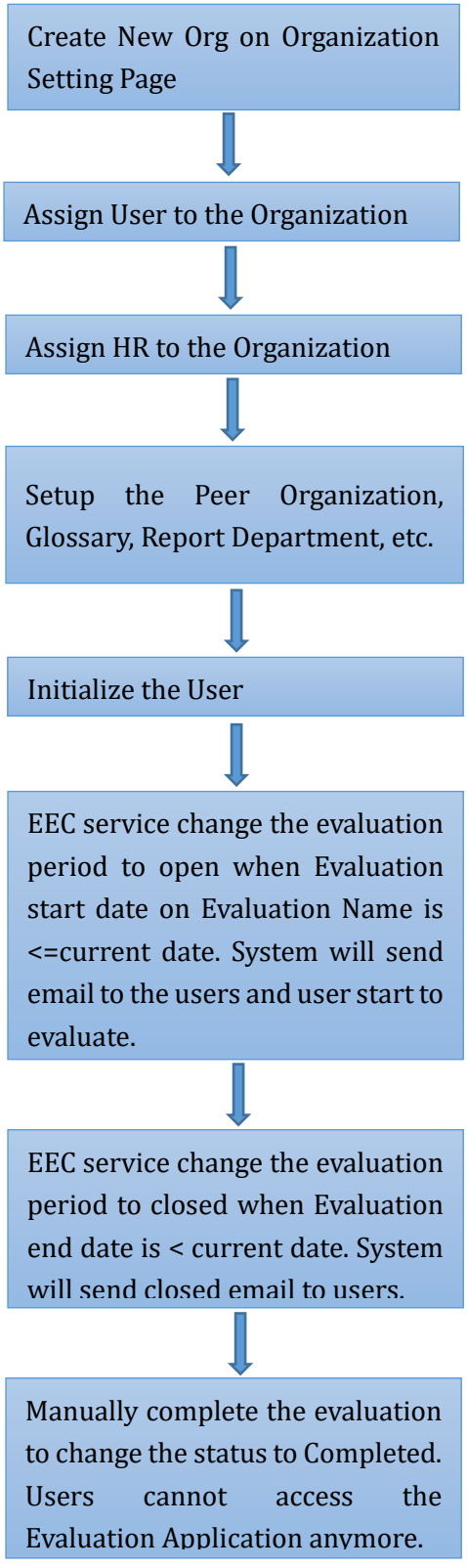
Evaluation Manual

Work Flow



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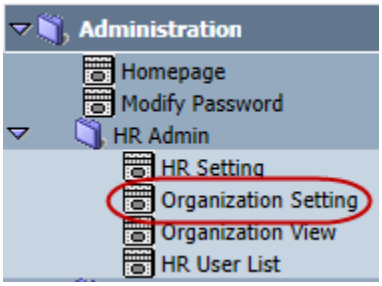
Procedure

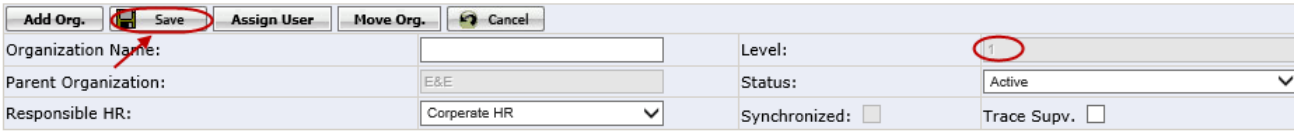
1. Create New Organization

1) Go to Organization Setting page under **Administration → HR Admin**



2) Select the Organization and click **Add Org.** to add a child organization under the selected Organization.

3) Enter Organization Name and click **Save.**



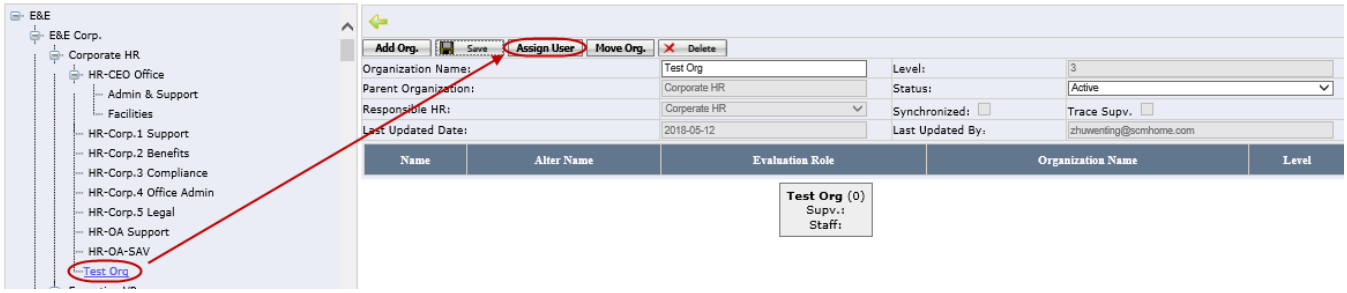
Note:

- The level will be automatically +1. (e.g. the selected organization level is 1, the added child organization will be 2.)
- Responsible HR: Corporate HR is for US corporate and Oversea HR is none US HR
- Trace Supv.: When it is checked, if employee current organization does not have the supervisor，initialization will automatically assign one or two level up organization supervisors as his/her supervisor

Click **Add Org.** to continue adding child Organization for the selected parent organization.

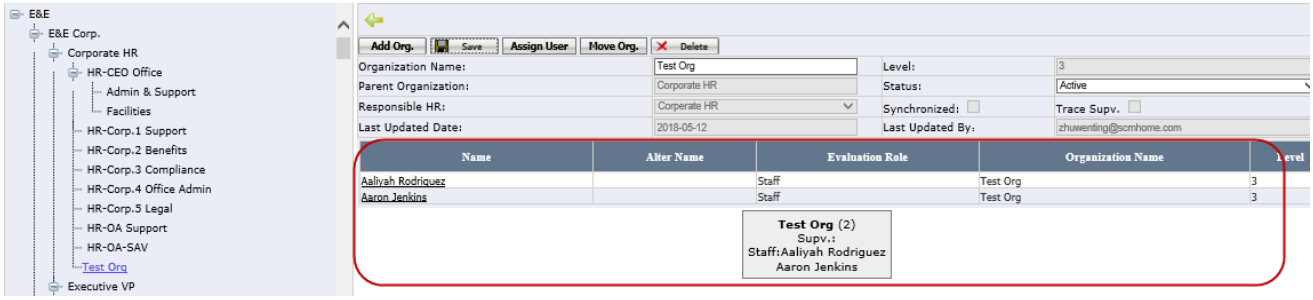
2. Assign Users to the Organization

1) Go to Organization Setting page. Select the organization and click **Assign User** button.



2) Select the users in the pop up window and click **Add**.

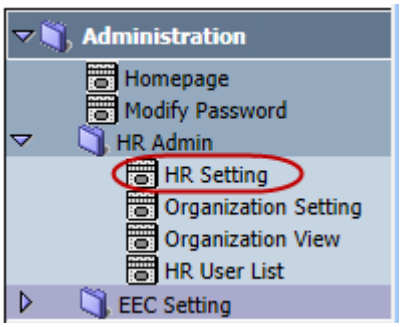
3) After user assigned, it can be viewed in the below.



Note: this function can't be used when evaluation period start. User need to go to HR User List to update the organization. See How to Make Changes to Existing User.

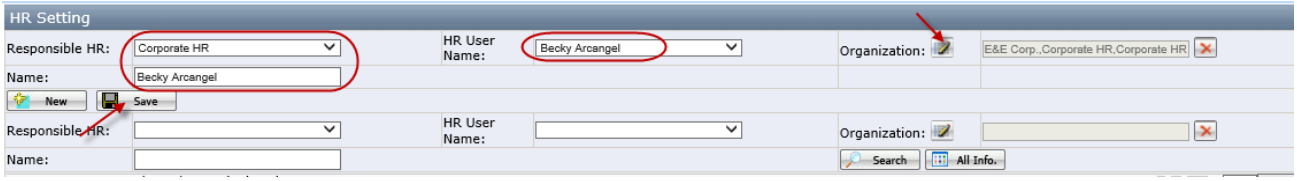
3. Assign HR to Organizations

1) Go to HR Setting under **Administration → HR Admin**

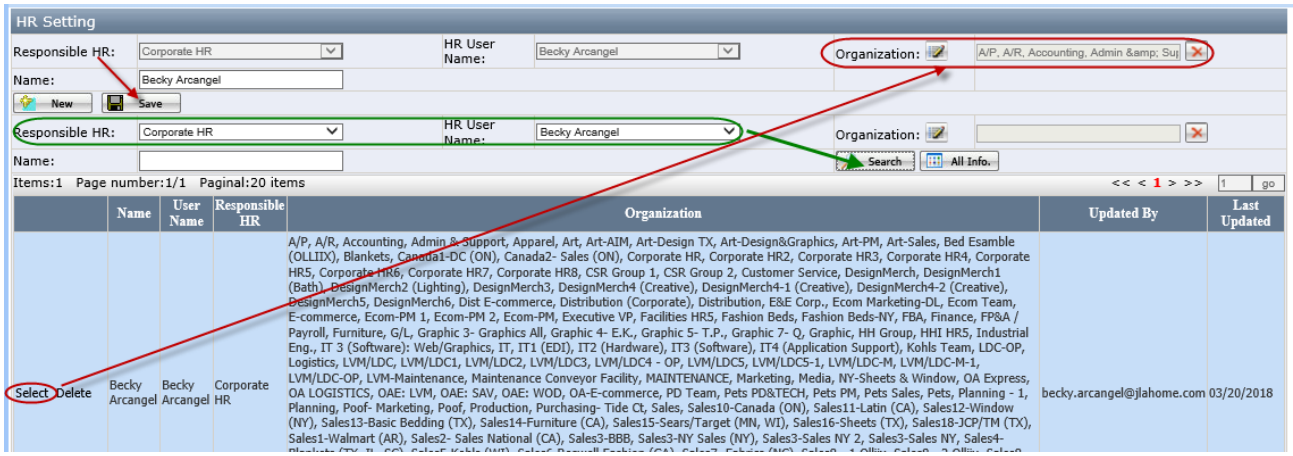


2) Assign HR to Organizations.

a. For new HR, please select the **Responsible HR**, **HR User Name**, **Organization** and enter the **Name** then click **Save**.

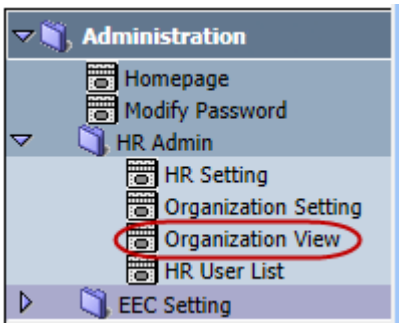


b. For existing HR, please search out and select the HR, then make the changes and click Save.

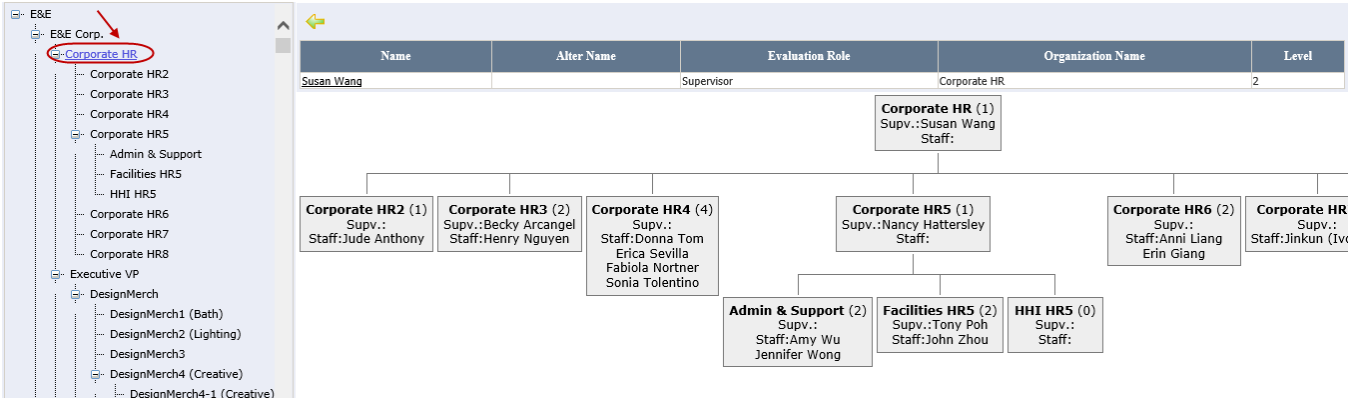


4. View the Organization Users

1) Go to Organization View page under **Administration → HR Admin**

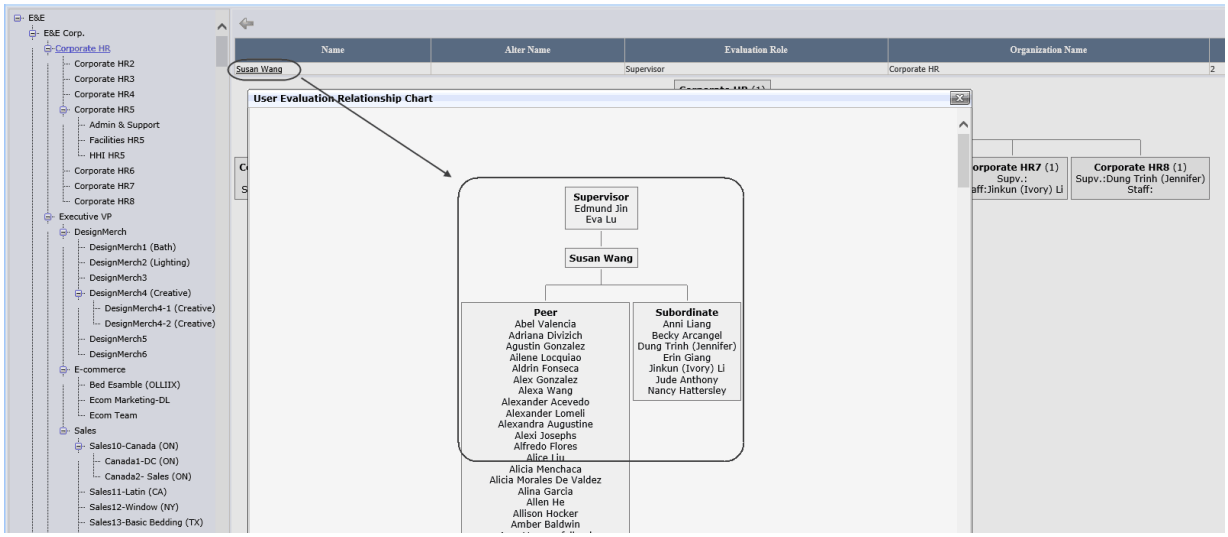


2) Click the Organization Name on the left side, this organization assigned user will be listed in the right side in the grid.



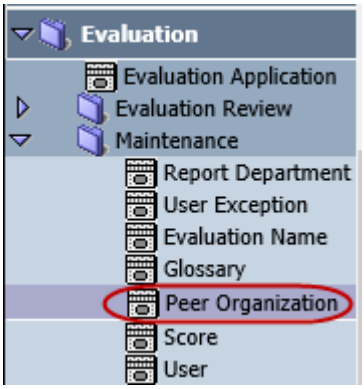
Note:

- HR can only see the Organizations which have been assigned to them on HR Setting page
- If the user is already initialized in the User page, click the name will open this user's relationship chart

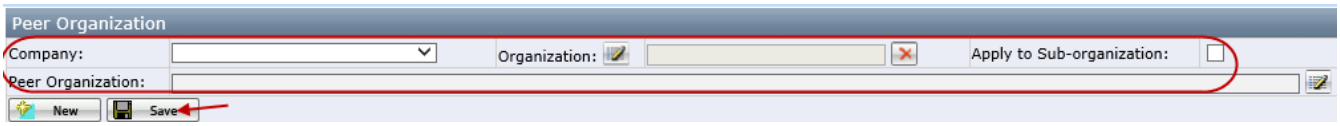


5. Setup the Peer Organization

1) Open Peer Organization page under **Evaluation → Maintenance.**



2) Enter the data in the fields and click **Save**. After saved successfully, the company and Organization cannot be changed. Once the organization has the peer organization, during the "Initialization" process it will automatically assign its peer organization's users as its peers.



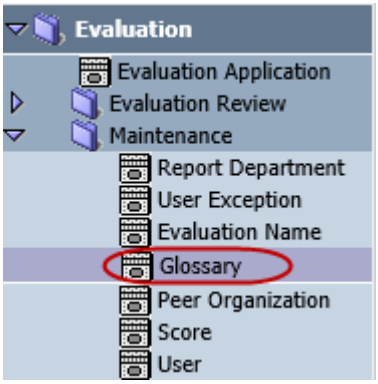
- **Organization**: List the selected company's child organizations and it is single selection
- **Peer Organization**: It is multiple selection
- **Apply to Sub-organization**: It is used by parent organization. If checked, system will copy the peer organization to the sub-organizations under the selected organization and the sub-organization will also peer each other

3) Click the Delete button in grid can delete the peer organization.

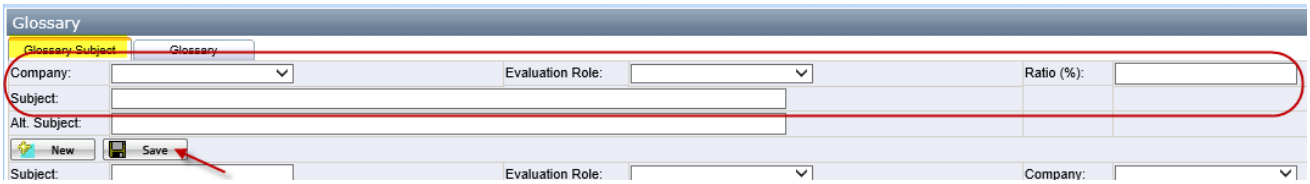
	Organization	Peer Organization
Select Delete	A/P	A/R, Admin & Support, Apparel, Art, Art-AIM, Art-Design TX, Art-Design&Graphics, Art-PM, Art-Sales, Bed Esamble (OLLIIX), Blankets, Canada1-DC (ON), Canada2- Sales (ON), Corporate HR, Corporate HR2...
Select Delete	A/R	A/P, Accounting, Admin & Support, Apparel, Art, Art-AIM, Art-Design TX, Art-Design&Graphics, Art-PM, Art-Sales, Bed Esamble (OLLIIX), Blankets, Canada1-DC (ON), Canada2- Sales (ON), Corporate HR...

6. Setup the Glossary

1) Open Glossary page under **Evaluation → Maintenance**



2) Enter the data in the required fields and click **Save** button to create a new glossary subject.



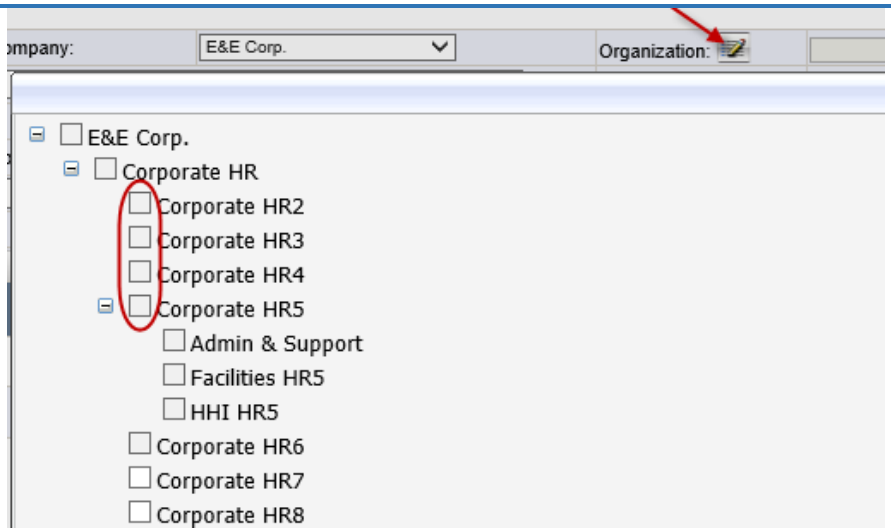
3) After saved successfully, sequence No. will be automatically configured. User can change the No. manually to resort the glossary subject.

4) Click the **Delete** button in grid can delete the glossary subject.

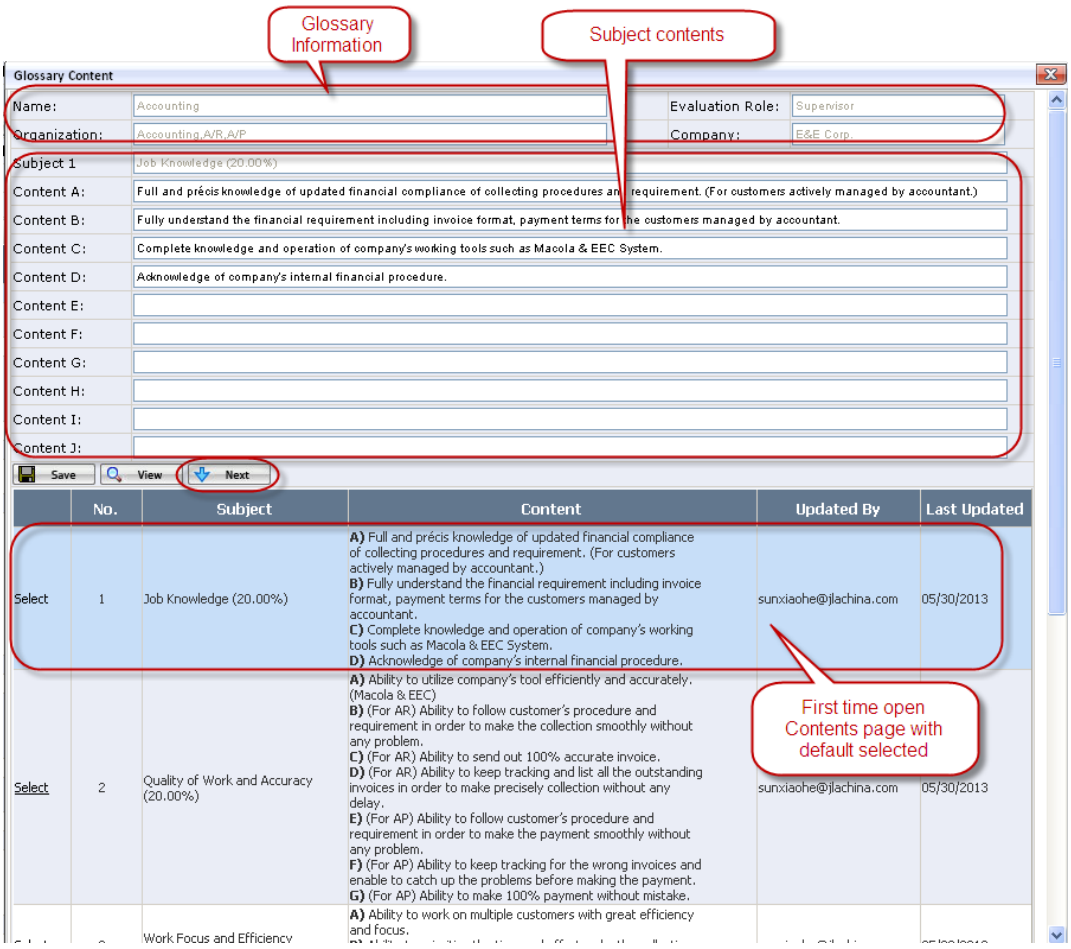
Note: If the subject is used in the glossary page, or Evaluation is "Open" or "Close" status, it cannot be deleted.

5) Go to Glossary tab to setup the glossary. Select **Evaluation Role**, **Company**, and **Organization**, enter **Glossary Name**, then click **Save** button. After saved successfully, "Evaluation Role" and "Company" cannot be changed anymore.

Note: If organization is already assigned to other glossary, the checkbox will be gray out



6) After glossary created, click **EN Contents** button to open glossary contents edit page.



7) Type in the contents for the selected subject and click **Save** button.
8) Click Next button or directly click **Select** button in the grid to select the next subject to edit.
9) Click **View** button to open the Glossary contents preview page.

Evaluation Glossary - Accounting - Supervisor (100.00%)

1. Job Knowledge (20.00%)
A) Full and précis knowledge of updated financial compliance of collecting procedures and requirement. (For customers actively managed by accountant.)
B) Fully understand the financial requirement including invoice format, payment terms for the customers managed by accountant.
C) Complete knowledge and operation of company's working tools such as Macola & EEC System.
D) Acknowledge of company's internal financial procedure.

2. Quality of Work and Accuracy (20.00%)
A) Ability to utilize company's tool efficiently and accurately. (Macola & EEC)
B) (For AR) Ability to follow customer's procedure and requirement in order to make the collection smoothly without any problem.
C) (For AR) Ability to send out 100% accurate invoice.
D) (For AR) Ability to keep tracking and list all the outstanding invoices in order to make precisely collection without any delay.
E) (For AP) Ability to follow customer's procedure and requirement in order to make the payment smoothly without any problem.
F) (For AP) Ability to keep tracking for the wrong invoices and enable to catch up the problems before making the payment.
G) (For AP) Ability to make 100% payment without mistake.

3. Work Focus and Efficiency (20.00%)
A) Ability to work on multiple customers with great efficiency and focus.
B) Ability to prioritize the time and effort make the collection (for AR) or payment (AP) by the due date to lessen company's loss.

4. Communication Skills (15.00%)
A) Clear, concise, and timely daily communications with customer and colleague on financial related issues.
B) Demonstrate effective negotiation skill with difficult customers relating to collection problems.
C) Ability to fight for the charge back and reduce the company loss to the minimal.
D) Proactively provide alternative and constructive suggestions to supervisor for decision making on issues outside of their authority.

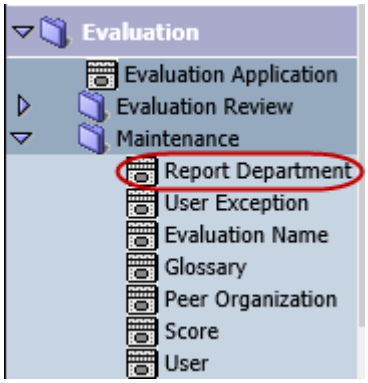
5. Team Work/Interpersonal Skills (10.00%)
A) Willingness to follow company's teamwork direction and abolish politics.
B) Willingness to offer unconditional help whenever there is a need.
C) Communicate to colleagues with respect, and only express issues/concerns of colleagues through the HR Department or department managers. Never make negative comments or remark behind the employee's back.

6. Attendance/Working Manner (7.50%)
A) Properly advises company of PTO for all personal time off in a timely fashion by own initiative.
B) Adheres to established work hours and a schedule that enhances productivity.
C) Demonstrate self-discipline by working without supervisor's oversight.

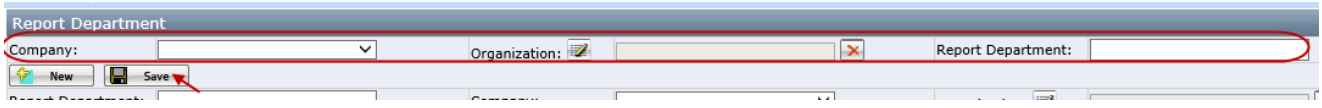
7. Pro-company (7.50%)
A) Ability to demonstrate a positive attitude towards company decisions, working related issues, and only communicate concerns through the prop channels.
B) Willingness to support and follow company's guidelines.
C) Able to always set a positive tone on behalf of the company.

7. Setup the Report Department

1) Open Report Department under **Evaluation → Maintenance.**



2) Enter the data and click **Save** to create a new report department. Users who with the same report department will compare the scores and list the result in the Self Review page.

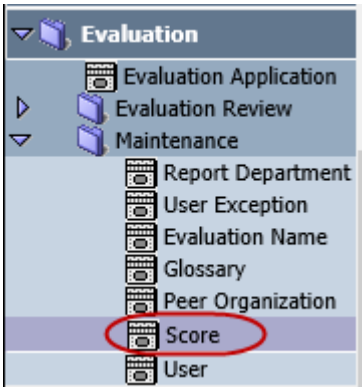


3) Click **Delete** button in the gird can delete the report department.

	Report Department	Organization	Company
Select Delete	Accounting	A/P,A/R,Accounting,Finance,FP&A / Payroll,G/L,Logistics	E&E Corp.
Select Delete	Back Office	Dist E-commerce,Distribution (Corporate),Distribution	E&E Corp.
Select Delete	COO	Art Distr,Art Warehouse	E&E Corp.

8. Score Maintenance

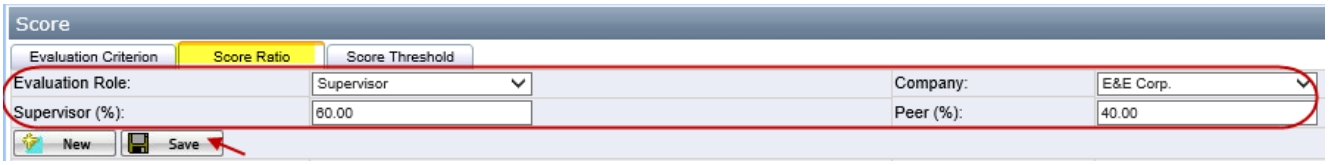
1) Open Glossary page under **Evaluation → Maintenance**



2) Create new score description on **Evaluation Criterion** tab. Enter the field and click **Save** button.

3) After saved successfully, sequence No. will be automatically configured. User can change the No. manually to resort the score description.

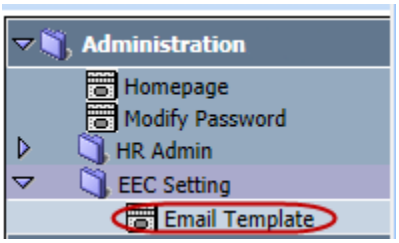
4) Go to **Score Ratio** tab to setup the score ratio. The final score calculation will based on the ratio.



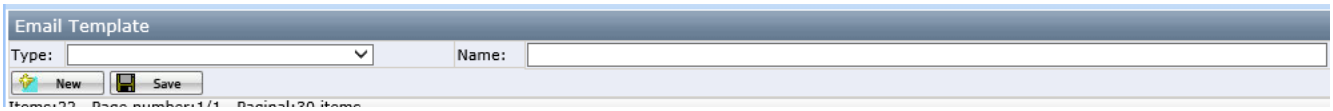
5) Go to **Score Threshold** tab to setup the score threshold. For evaluation, users have to input comments if their score is not within min-max threshold.

9. Setup the Email Template

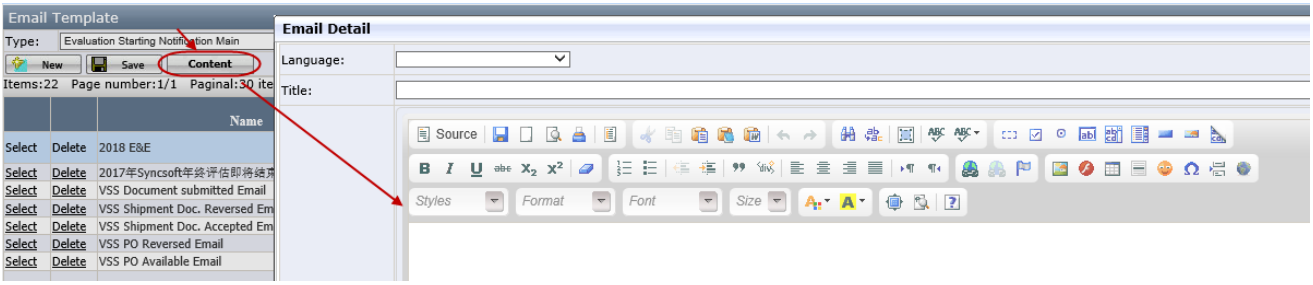
1) Go to Email Template under **Administration → EEC Setting**.



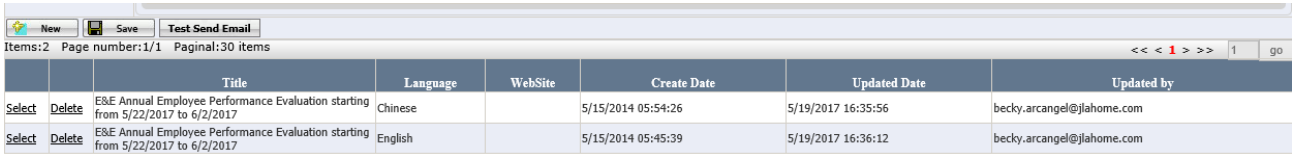
2) Select the Email Type and enter the Email Name, then click **Save** button.



3) After saving successfully, there will be **Content** button appear. Click the **Content** button to open the Email Detail page.

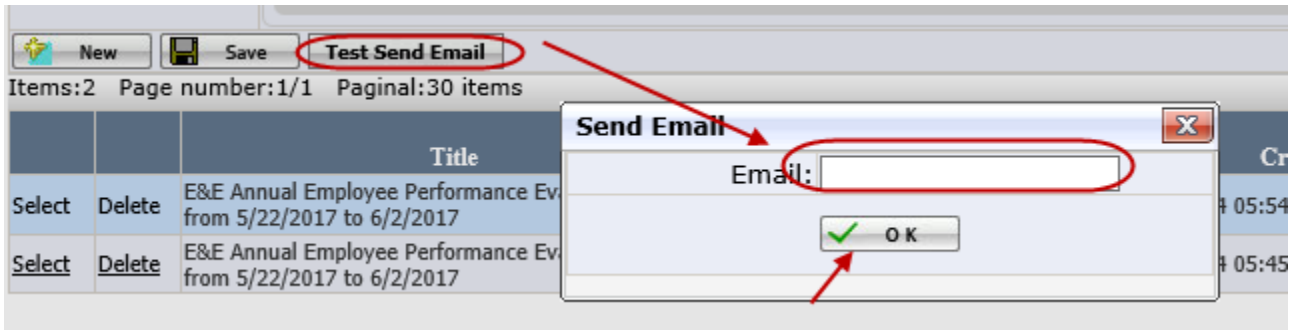


4) Editing the email content and click **Save**. The Email Template will list at the bottom.
   - **Title**: Email subject when send out



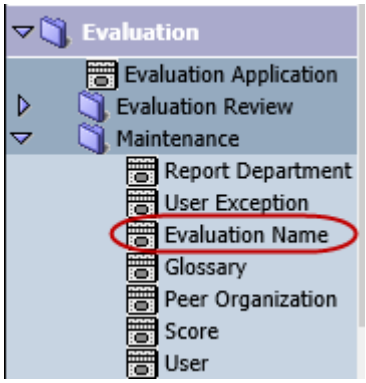
Note: Each Email Template must contain both language

5) Select one email and click **Test Send Email** button, type the valid email address and click OK. This template will be sent out to the email address.

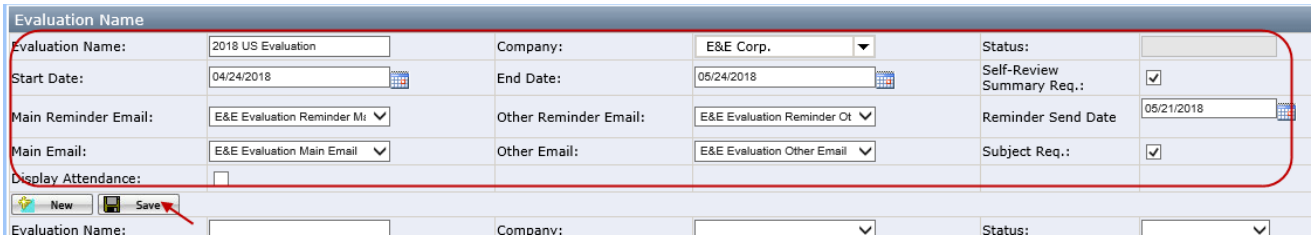


10. Setup the Evaluation Name

1) Open Evaluation Name under **Evaluation → Maintenance.**

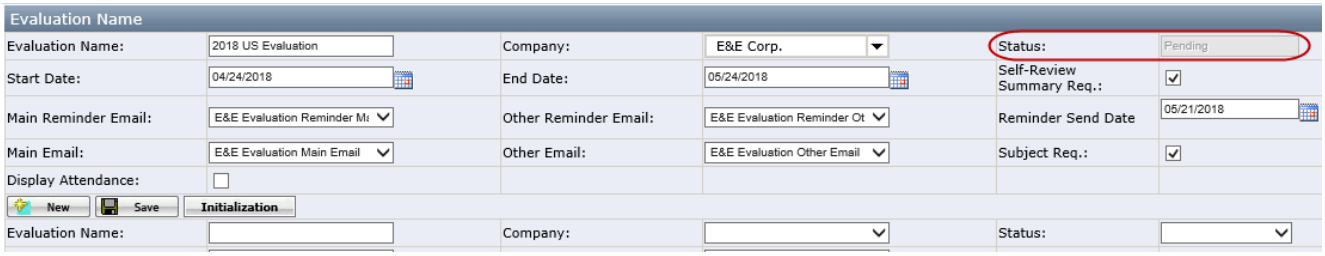


2) Enter the required field and click **Save**.



- **Start Date**: Default =Current date + 1 week
- **End Date:** Default **=**Start Date +1 month
- **Main Reminder Email/Email Template:** Select the email template from dropdown list
- **Other Reminder Email/Email Template:** Select the email template from dropdown list
- **Reminder Send Date:** reminder email send date
- **Self-Review Summary Req.**: If checked, the user must enter self-summary in self-evaluation page
- **Subject Req.**: If unchecked, user can save and submit the scores even some subjects are missing scores
- **Display Attendance:** if checked, annually attendance will display on self-evaluation page

3) New period is created and the status is **Pending.**



4) After run Evaluation Service, if current date is >= Start Date, the status will change to **Open**, user can do evaluation. Then when current date is > End Date, the status will change to **Closed**.

11. Initialize Users

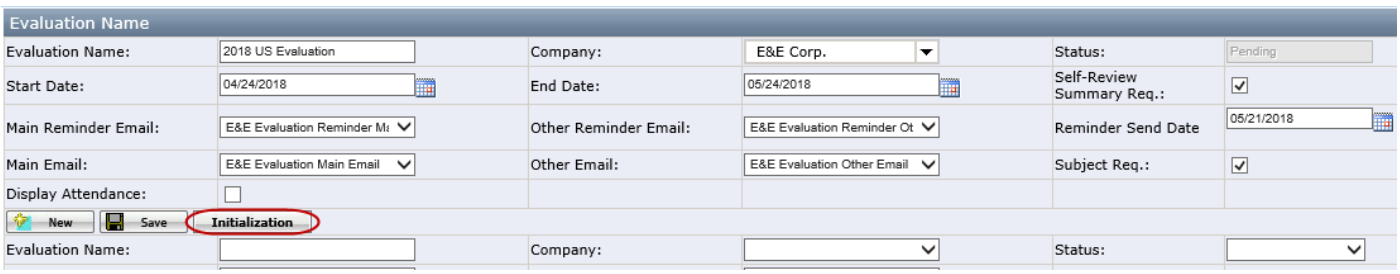
Initialization is used to generate the user's relationship according to the assigned organization and it's peer organization. It will update the related users' supervisor, peer and subordinate.

11.1 Initialize Multiple Users

There are two ways to initialize multiple users.

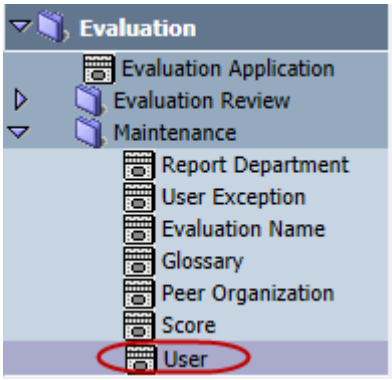
➢ Initialization on Evaluation Name page

After Evaluation Name saved successfully, there will button **Initialization** appear**.** Click the button, there will be a warning message "Are you sure to initialize all user evaluation settings for the selected company?" Click **"Yes"**, all the users under the company and who's initialization status is "No" will be initialized.



➢ Initialization on User page

1) Open User page under **Evaluation → Maintenance.**



Note: All the users, which are active, checked with evaluation Req., assigned with Evaluation Role and Organization Name will be listed in the user list

2) Select one or multiple users and click **Initialization** button. There will be a message: "Are you sure to initialize the evaluation setting for the selected user(s)?" Click **Yes**, the selected users will be Initialized.

Note:

- If the user is not initialized, the Initialization status is "No" in the grid, otherwise is "Yes"
- When there is score with the user, the checkbox will be gray out. HR can re-initialize the user by clicking each user's initialization button. See How to Re-initialize User

11.2 Initialize Single User

1) Click the user name in the grid, whose initialization status is "No".
2) There will be a warning message: "You cannot open this user evaluation setting page since his/her user evaluation setting has not been initialized. Do you want to initialize it now?" Click **OK** to initialize this user and User setting page will be opened after initialized complete.

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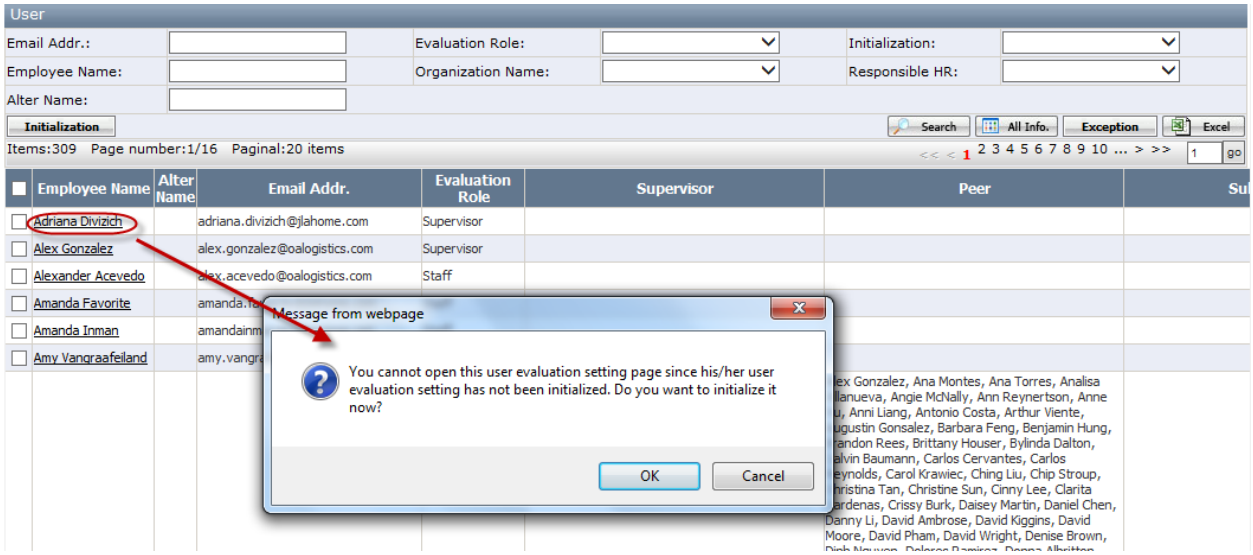
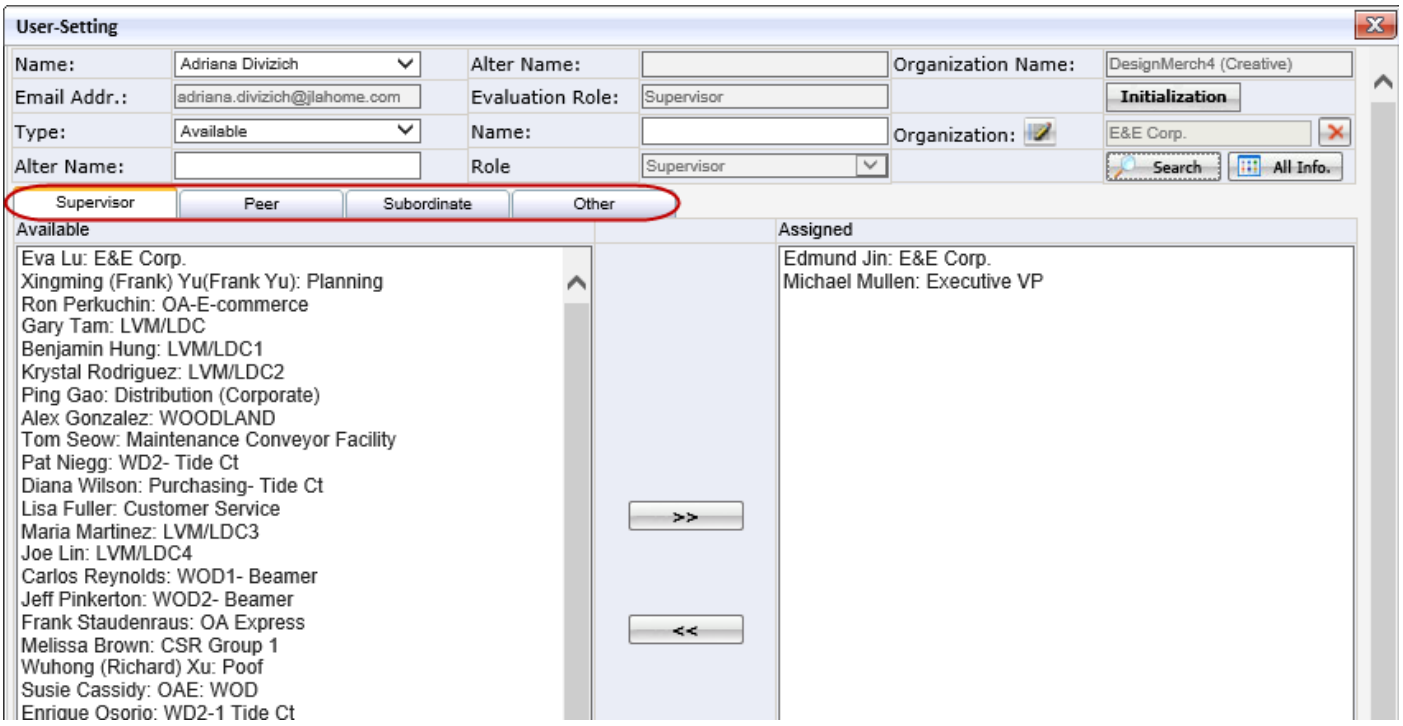


12. Manually Adjust Relationship after Initialization

After initialization, user's relationship can be viewed on **User Setting** page and the relationship can be manually adjust if necessary.



Supervisor Tab

- **Available:** List all users under the same company whose role is supervisor and the organization level is higher than the user's organization level.
- **Assigned:** For supervisor it will automatically assign one level higher organization supervisor as his supervisor; for staff role user, it will automatically assign his current organization's supervisor as his supervisor.

Peer Tab

- **Available:** List all users under the same company. If the user who has been assigned to "Supervisor" or

"Subordinate", it will not be listed here.

- **Assigned:** For supervisor role user, it will automatically assign the user whose role is supervisor within the same organization level and the staff users one level higher as his peer; for staff role user, it will automatically assign the user whose role is staff within the same organization level as his peer.

Subordinate Tab

This tab is only available if the user with the evaluation role Supervisor.

- **Available:** List all users under the same company whose role is staff and the organization level is lower than his own organization level.
- **Assigned:** For supervisor role user, it will automatically assign one level lower organization supervisor as his subordinates.

Other Tab

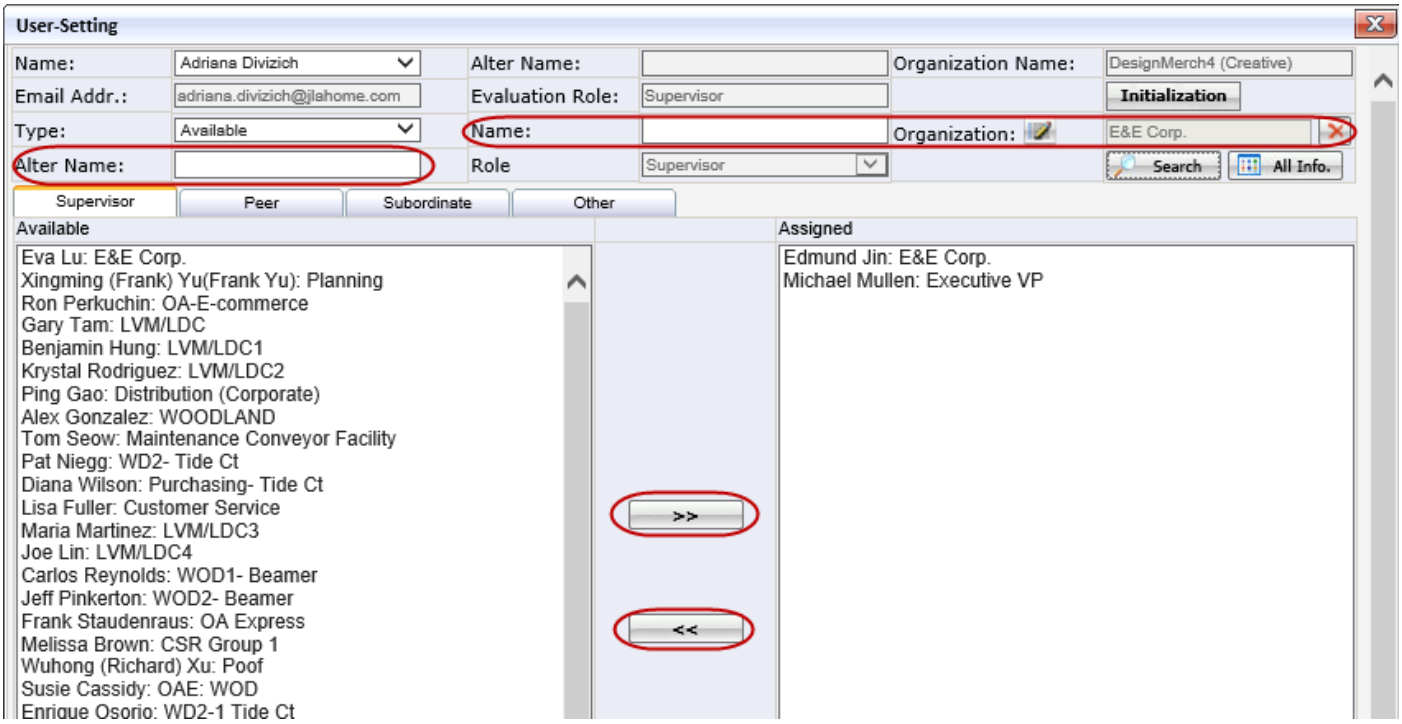
This tab is used when some employee who are not involved in evaluation but have to evaluate others.

- **Available:** List all users
- **Assigned:** Empty

User can search the user by search criteria, select the users in the available fields and click ">>" icon to add the users to the Assigned field.

User can select the users in the assigned fields and click "<<" icon to delete the users from the Assigned field to the available field.

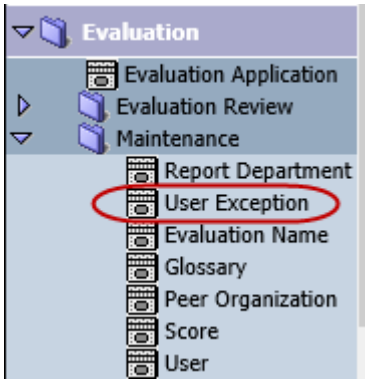
Note: After Re-initialization, the manual adjustment will be cleared.



13. Checking the User Exception

After all the users are initialized, HR can go to User Exception report to check users who are missing supervisor, peer or subordinator.

1) Go to User Exception under **Evaluation → Maintenance.**



Note: User can also click Exception button on User list to open the exception report.

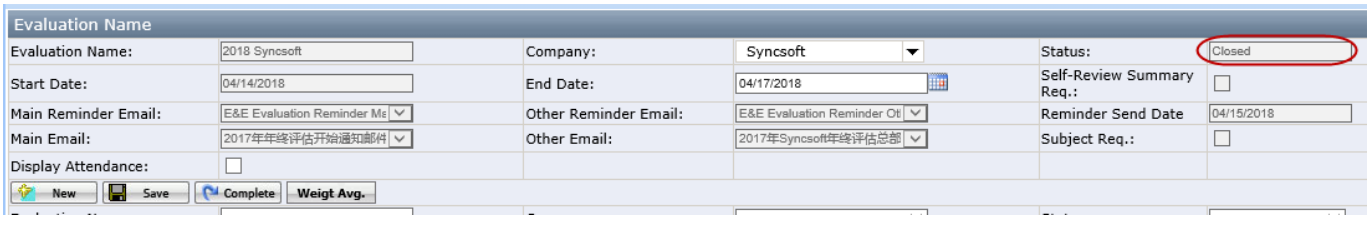
2) Select the Evaluation Name and click **Search**.

Evaluation Service

Evaluation Service is run regularly.

1. If the Evaluation start date on Evaluation Name is <=current date, the status of period will change to **Open**. System will send email to the Employees and Employees can start to evaluate.

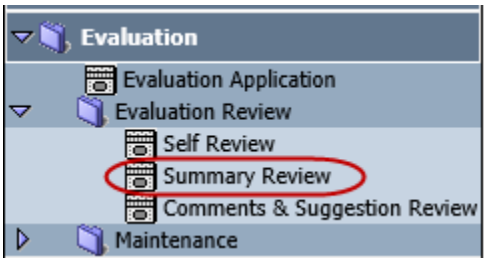
2. If Reminder Send Date = current date, system will send a reminder mail to Employees.
3. If the Evaluation end date is < current date, the status of period will change to **Closed**. System will send closed email to the Employees.



4. Click **Complete** button, the period status will change from **Closed** to **Complete**. Users cannot access the Evaluation Application anymore.

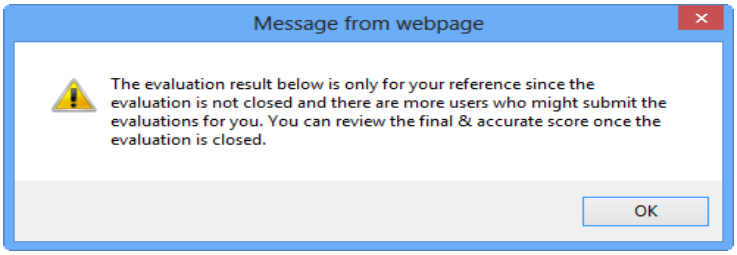
Evaluation Result Review

Supervisor can review his team's evaluation result on **Summary Review** page.

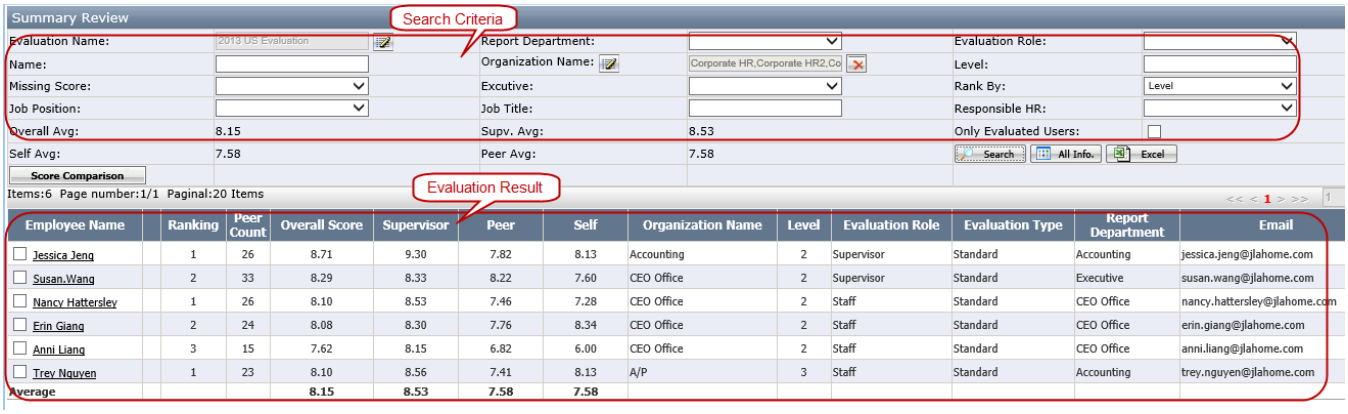


Note:

- This page only allows the employee who has the **Supervisor** evaluation role to access. Each supervisor can only review his own organization evaluation result. HR Manager can review the whole company evaluation result.
- When the evaluation is in "Open" status, the evaluation result is not finalized. When you click this page, it will get a warning message below. If you click **OK**, it will open **Summary Review** page.



1. Summary Review



1.1 Search Criteria

- **Report Department:** Search out the employee who have the selected report department
- **Organization Name:** Search out the employee who are assigned to the selected organization

- **Missing Score:** Search out the employee missing **Peer** or **Supervisor** or **Self Score**
- **Level:** The level of the organization
- **Rank By:** the ranking will be different according to the rank by
  Level: It is the default value, result will rank by Level--> Evaluation Role-->Overall score
  Overall score: Rank by Overall score
  Peer Score: Rank by Peer score
  Report Department: Rank by Report Department--> Evaluation Role-->Overall score
  Supervisor Score: Rank by Supervisor score
- **Executive:** Search out the employee having the executive role

1.2 Evaluation Result

- **Missing Score**: If user missing score, there will be a red flag

Employee Name		Ranking	Peer Count	Overall Score	Supervisor	Peer	Self	Organization Name	Level
Li Hong		2	0	0.00	0.00	0.00	0.00	QA-3	3

- **Ranking**: System automatically generated rank according to the rank by

Employee Name		Ranking	Peer Count	Overall Score	Supervisor	Peer	Self	Organization Name	Level	Evaluation Role	Evaluation Type	Report Department
Nina Jin		1	17	8.44	8.58	8.23	7.37	IT3 (Software)	3	Supervisor	Standard	IT
Karen Liu		1	6	7.85	7.96	7.69	8.10	IT3 (Software)	3	Staff	Standard	IT
Lane Zhao		2	5	7.80	8.07	7.40	7.98	IT3 (Software)	3	Staff	Standard	IT
Ian Zhu		3	11	7.66	8.05	7.08	6.15	IT3 (Software)	3	Staff	Standard	IT
Average				**7.94**	**8.17**	**7.60**	**7.40**					

- **Overall Avg.:** It is average of the peer score based on your search result excluding the employee missing **Peer** or **Supervisor Score**
- **Self Avg.:** = (Employee 1 Self Score + Employee 2 Self Score +…)/Total Employee Number excluding the employee missing **Self Score**
- **Supv. Avg.:** = (Employee 1 Supervisor Score + Employee 2 Supervisor Score +…)/Total Employee Number excluding the employee missing **Supervisor Score**
- **Peer Avg.:** = (Employee 1 Peer Score + Employee 2 Peer Score +…)/Total Employee Number excluding the employee **Peer Score**

Overall Avg.:	7.22	Supv. Avg.:	7.12
Self Avg. :	7.70	Peer Avg.:	7.37

- **Export Button**: click to export the result to excel file
- **Score Comparison Button**: It is used to compare the scores for multiple employees. If the evaluation role contains supervisor and staff, it will group the evaluation result by evaluation role.

Excel

Supervisor	Total Score	Job Knowledge 20.00%	Quality of Work and Accuracy 20.00%	Work Focus and Efficiency 20.00%	Communication Skills 15.00%	Team Work/Interpersonal Skills 10.00%	Attendance/Working Manner 7.50%	Pro-company 7.50%
Nina Jin	8.44	9.50	8.05	8.22	8.40	8.74	8.14	8.42

Staff	Total Score	Job Knowledge 20.00%	Quality of Work and Accuracy 20.00%	Work Focus and Efficiency 20.00%	Communication Skills 15.00%	Team Work/Interpersonal Skills 10.00%	Attendance/Working Manner 7.50%	Pro-company 7.50%
Karen Liu	7.85	7.84	8.05	7.78	7.83	8.05	7.87	7.63
Lane Zhao	7.80	8.30	7.88	7.23	7.66	7.70	8.14	7.19
Ian Zhu	7.66	7.44	8.29	7.76	7.52	7.92	7.54	7.45

2. Individual Employee Review

Click the employee name to open the evaluation result of individual employee.

Employee Name	Ranking	Peer Count	Overall Score	Supervisor	Peer	Self	Organization Name	Level	Evaluation Role	Evaluation Type	Report Department
Donald Bolivar	1	10	8.36	8.50	8.16	8.61	WOD	3	Supervisor	Standard	OA
William Stewart	1	1	8.31	8.51	8.00	8.23	WOD	3	Staff	Standard	OA
Carlos Reynolds	1	4	7.47	7.46	7.48	9.00	WOD1	4	Supervisor	Standard	OA
Louis Little	1	4	7.59	7.13	8.27	8.23	WOD2-1	5	Supervisor	Standard	OA

Self Review

Employee Name: Donald Bolivar | Report Department: OA | Evaluation Role: Supervisor | Evaluation Name: 2015 US Evaluation

Click + icon to view evaluation criterion.

Evaluation Result: Excel

Evaluation From	Total Score	Ref.	Job Knowledge 20.00%	Quality of Work and Accuracy 20.00%	Work Focus and Efficiency 20.00%	Communication Skills 15.00%	Team Work/Interpersonal Skills 10.00%	Attendance/Working Manner 7.50%	Pro-company 7.50%
Overall Score	**8.36**		8.79	8.06	8.78	7.54	7.54	9.18	8.89
Self	**8.61**		8.75	8.50	8.50	8.75	8.75	9.00	8.00
Peer Avg	**8.16**		8.47	8.16	8.44	7.59	7.59	8.69	7.97
P1	9.65	√	9.50	10.00	10.00	10.00	9.00	9.00	9.00
P2	9.35		10.00	9.00	9.00	10.00	9.00	9.00	9.00
P3	9.00		9.00	9.00	9.00	9.00	9.00	9.00	9.00
P4	8.58		8.50	8.50	8.50	8.50	8.50	9.00	9.00
P5	8.32		8.25	8.25	8.50	8.25	8.25	8.50	8.25
P6	8.18		9.00	8.00	9.00	7.00	6.50	9.00	8.00
P7	8.08		8.00	8.00	8.00	8.00	8.00	9.00	8.00
P8	7.16		8.00	8.00	9.00	4.50	4.00	9.50	5.00
P9	6.63		7.00	6.50	6.50	5.50	7.50	6.50	7.50
P10	6.50	√	7.00	7.00	7.00	4.00	5.00	9.00	7.00
Supervisor Avg	**8.50**		9.00	8.00	9.00	7.50	7.50	9.50	9.50
Rodney Dickey	8.50		9.00	8.00	9.00	7.50	7.50	9.50	9.50

Evaluation Comparison:

Comparision Type	Comparison Percentage
Self VS Peer	5.23%
Self VS Supervisor	1.28%

Evaluation Overall:

Score Type	Highest	Lowest	Average	Current Employee
Peer Avg	8.60	2.45	7.25	8.16
Supervisor Avg	9.33	2.45	7.18	8.50
Overall Score	8.80	2.45	7.21	8.36

Comments & Suggestion: | Self-Review Summary: | Supervisor Suggestion:

2.1 Evaluation Result

Evaluation Result: Excel

Evaluation From	Total Score	Ref.	Job Knowledge 20.00%	Quality of Work and Accuracy 20.00%	Work Focus and Efficiency 20.00%	Communication Skills 15.00%	Team Work/Interpersonal Skills 10.00%	Attendance/Working Manner 7.50%	Pro-company 7.50%
Overall Score	**8.36**		8.79	8.06	8.78	7.54	7.54	9.18	8.89
Self	**8.61**		8.75	8.50	8.50	8.75	8.75	9.00	8.00
Peer Avg	**8.16**		8.47	8.16	8.44	7.59	7.59	8.69	7.97
P1	9.65	√	9.50	10.00	10.00	10.00	9.00	9.00	9.00
P2	9.35		10.00	9.00	9.00	10.00	9.00	9.00	9.00
P3	9.00		9.00	9.00	9.00	9.00	9.00	9.00	9.00
P4	8.58		8.50	8.50	8.50	8.50	8.50	9.00	9.00
P5	8.32		8.25	8.25	8.50	8.25	8.25	8.50	8.25
P6	8.18		9.00	8.00	9.00	7.00	6.50	9.00	8.00
P7	8.08		8.00	8.00	8.00	8.00	8.00	9.00	8.00
P8	7.16		8.00	8.00	9.00	4.50	4.00	9.50	5.00
P9	6.63		7.00	6.50	6.50	5.50	7.50	6.50	7.50
P10	6.50	√	7.00	7.00	7.00	4.00	5.00	9.00	7.00
Supervisor Avg	**8.50**		9.00	8.00	9.00	7.50	7.50	9.50	9.50
Rodney Dickey	8.50		9.00	8.00	9.00	7.50	7.50	9.50	9.50

- **Total Score:**
  Overall Score = **Peer Avg. *** 40% **+ Supervisor Avg. *** 60% (The percentage is maintained by HR on Score/ Score Ratio)
  Self = Sum of (**Score** of each subject* **Score Percentage** of each subject)
  Peer Avg. = (P1 Total Score + P2 Total Score +…)/Total Peer Number
  Supervisor Avg. = (Supervisor1 Total Score + Supervisor2 Total Score +…)/Total Supervisor Number
- **Ref.**: the highest and lowest score will have a check
- **Comment Flag**: If there is a comment for any score, it will have a red flag . You can click the score having the hyperlink to review the comment
- **Excel**: export the evaluation result to an excel file
- The score for each subject is an average score = Peer Avg. of each Subject * 40% + Supervisor Avg. of each Subject * 60%

Evaluation Result:

Evaluation From	Total Score	Ref.	Job Knowledge 20.00%	Quality of Work and Accuracy 20.00%	Work Focus and Efficiency 20.00%	Communication Skills 15.00%	Team Work/Interpersonal Skills 10.00%	Attendance/Working Manner 7.50%
Overall Score	**8.36**		8.79	8.06	8.78	7.54	7.54	9.18
Self	**8.61**		8.75	8.50	8.50	8.75	8.75	9.00
Peer Avg	**8.16**		8.47	8.16	8.44	7.59	7.59	8.69
P1	9.65	√	9.50	10.00	10.00	10.00	9.00	9.00

2.2 Evaluation Comparison

Evaluation Comparison:

Comparision Type	Comparison Percentage
Self VS Peer	5.23%
Self VS Supervisor	1.28%

Self VS Peer: (Self -Peer Avg.)/Self * 100%

- If the percentage is positive, it means self-score is higher than Average Peer Score
- If the percentage is "0", it means self-score is equal to the Average Peer Score
- If percentage is negative, it means self-score is lower than Average Peer Score

Self VS Supervisor: (Self -Supervisor Avg.)/Self * 100%

- If percentage is positive, it means self-score is higher than Average Supervisor Score
- If the percentage is "0", it means self-score is equal to the Average Supervisor Score
- If percentage is negative, it means self-score is lower than Average Supervisor Score

Note: If the employee has no **Self Score**, **Evaluation Comparison** will be blank.

2.3 Evaluation Overall

Evaluation Overall:

compared score

current employee score

Score Type	Highest	Lowest	Average	Current Employee
Peer Avg	8.60	2.45	7.25	8.16
Supervisor Avg	9.33	2.45	7.18	8.50
Overall Score	8.80	2.45	7.21	8.36

- **Compared Score**
  List **Highest, Lowest and Average** of **Peer Avg. Score/ Supervisor Avg. Score / Overall Score** in the same report department
  Note: If the employee is missing supervisor or peer score, it will not be counted as part of **Highest, Lowest and Average** of **Peer Avg. Score/ Supervisor Avg. Score / Overall Score**.
- **Current Employee Score**
  See **Overall Score, Peer Ave. Score and Supervisor Avg. Score** in **Total Score** of **Evaluation Result**

Appendix

Page Role Control

Working Page	Page Functionality	Roles	Detail
Organization Setting	Setup organizations	• HR Director • CH-HR Director • HR Mgr • CH-HR Mgr	
Organization View	View the organization users	• HR Director • CH-HR Director • HR Mgr • CH-HR Mgr • HR Coordinator	See the assigned organizations
HR User List	Setup users and assign the organization to users	• HR Director • CH-HR Director • HR Mgr • CH-HR Mgr • HR Coordinator	1. Default display all employees in assigned organizations 2. HR cannot see Delete and Password buttons
HR Setting	Assign organizations to HR	• HR Director • CH-HR Director • HR Mgr • CH-HR Mgr	
Score	Maintain Score criterion, score ratio and score threshold	• HR Director • CH-HR Director • HR Mgr • CH-HR Mgr	
Glossary	Maintain glossary	• HR Director • CH-HR Director • HR Mgr • CH-HR Mgr	
Report Department	Maintain report department	• HR Director • CH-HR Director • HR Mgr • CH-HR Mgr	
Peer Organization	Setup peer organization between organizations	• HR Director • CH-HR Director • HR Mgr • CH-HR Mgr	HR can only setup the assigned organizations
User	Initialize the users and manually adjust the relationship	• HR Director • CH-HR Director • HR Mgr • CH-HR Mgr • HR Coordinator	Only display the employees in assigned organizations
User Exception	Check the users who are missing supervisor, peer or subordinator	• HR Director • CH-HR Director • HR Mgr • CH-HR Mgr	Only display the employees in assigned organizations
Evaluation Name	Create an evaluation plan, setup the start date and end date of the evaluation	• HR Director • CH-HR Director • CH-HR Mgr	
Evaluation Application	Do evaluation	• Evaluation	1. All evaluation users can access this page during the evaluation period. 2. When the current evaluation period status is Pending and Close, Evaluate, Submit and Skip button will hide. 3. When the current evaluation period status is "Complete", user cannot access this page anymore.

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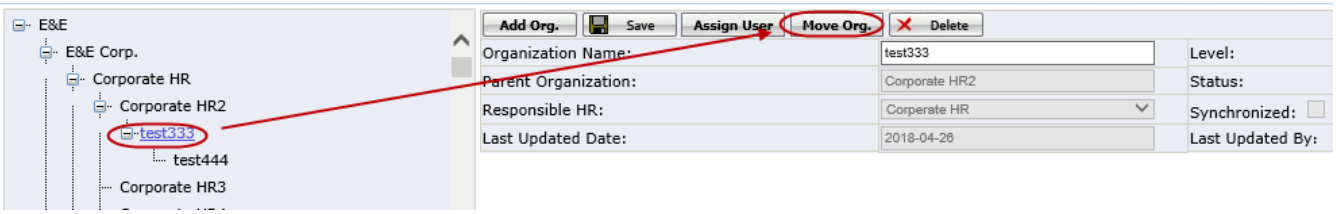
Self Review	Review the score from peers and supervisor	• Evaluation	1. User can access this page when the current evaluation status is Open or Close. 2. If the user role is Top manager, the score is blank since Top management only need do evaluation for the subordinator.
Summary Review	Supervisor review his team's evaluation result and compare user's scores	• Supervisor Evaluation Role • HR Director • CH-HR Director • HR Mgr • CH-HR Mgr • Top Management	1. For evaluation role is supervisor and without HR role, user can see the users in the organizations which are assign to them. 2. For HR Manager, if evaluation role is supervisor, it will list all assigned organization in the HR User Setting Page and her/his assigned organization in the user list. If evaluation role is staff, it will list assigned organizations in the HR User Setting Page. 4. Top management role can see all the users in the evaluation.
Comments & Suggestion Review	Supervisor review the suggestion and comments of his team	• Supervisor Evaluation Role • HR Director • CH-HR Director • HR Mgr • CH-HR Mgr • Top Management	Same as above

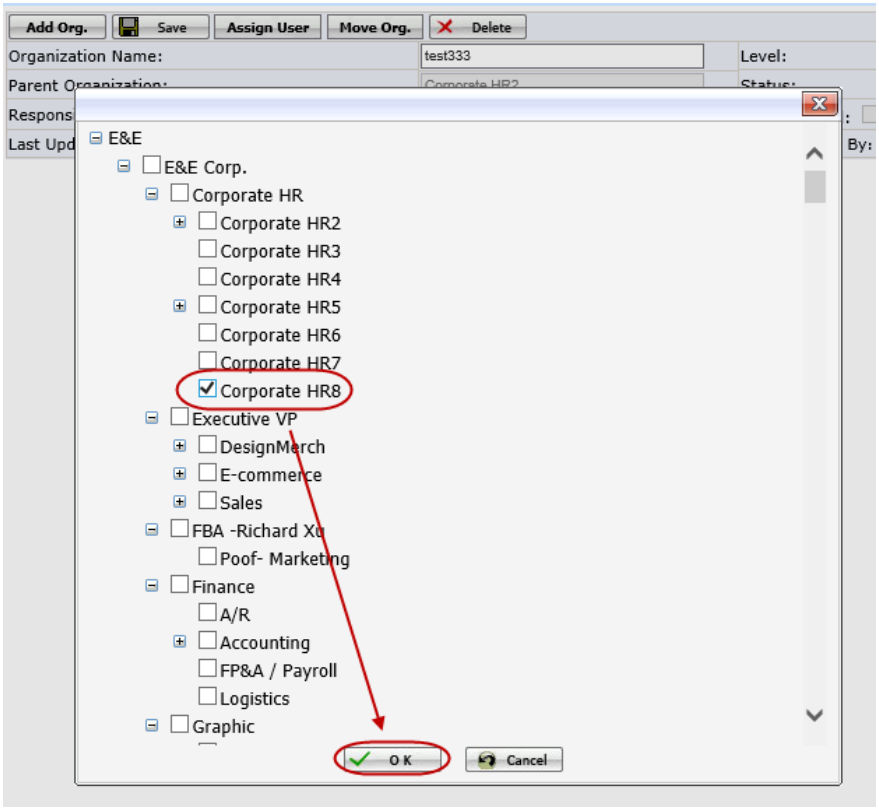
FAQ

How to Move the Organization

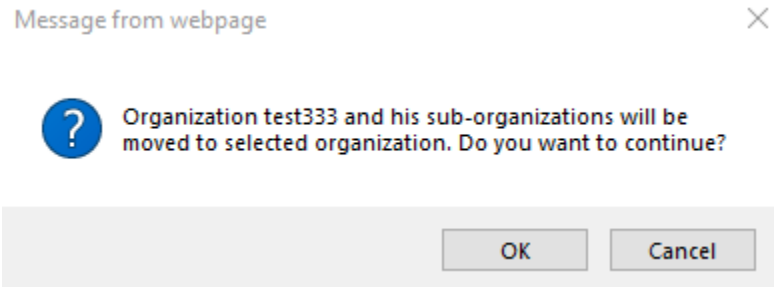
1) Select an organization and click **Move Org.** button.



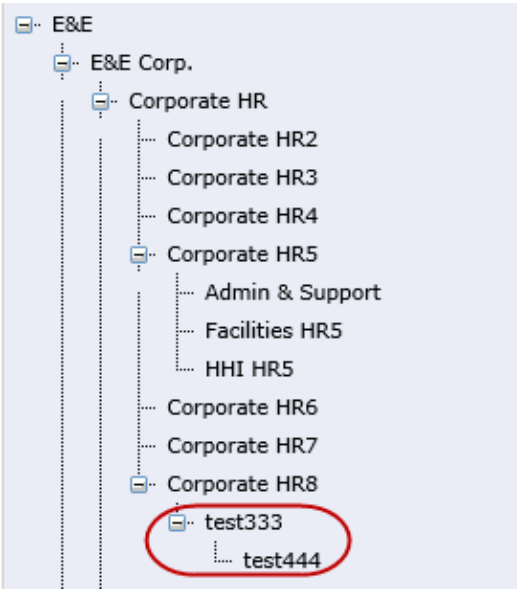
2) Choose an organization in the pop up window and click OK.



3) There will be alert message, click OK to continue to move the organization.



4) After the organization moved successfully, it will list under the selected organization.



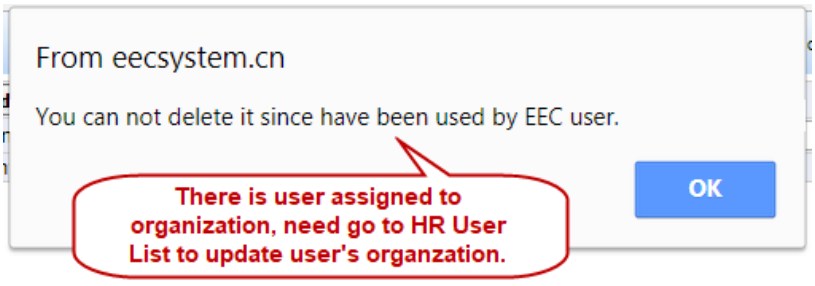
5) The Glossary, Peer Organization and Report Department will be removed after Organization moving. Go to the maintenance page to setup accordingly.

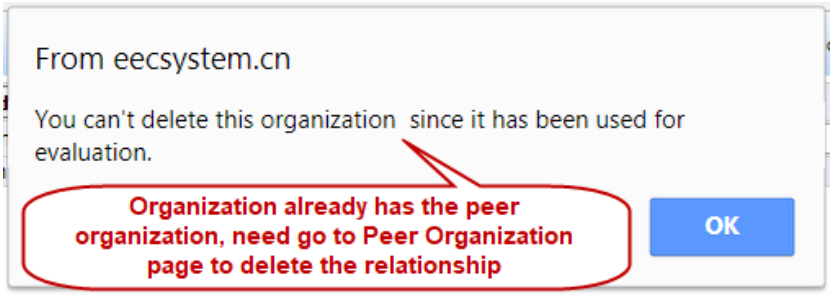
Note: Move Org. function can't be used when evaluation period start

How to Delete the Organization

Select one organization and click **Delete** button to delete the selected organization.

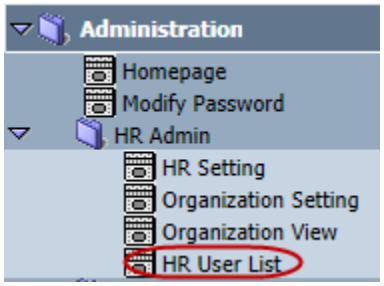
Note: User will receive below error if there is user assigned to the organization or the organization has the peer organization.



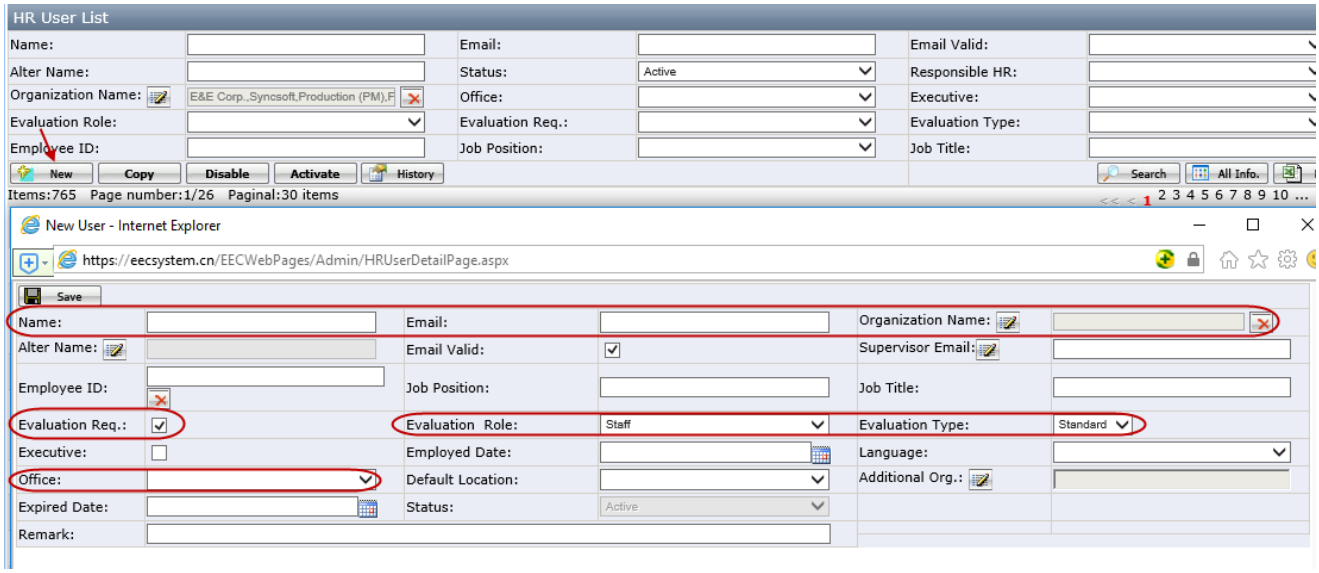


How to Create a New User

1) Go to HR User List page under **Administration → HR Admin**



2) Click **New** to open Edit User page. Put in **Name** and email address. Select **Organization Name, Evaluation Role** and **Evaluation Type**, then check **Evaluation Req.** checkbox for the user.



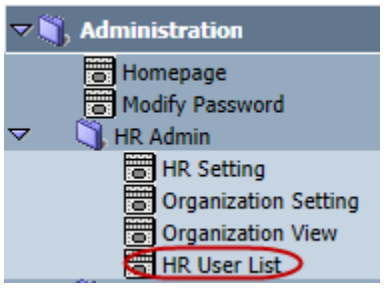
Note

- Users who check the Evaluation Req. checkbox will be listed in the "Organization view" page and "User" page
- **Evaluation Type**: Standard/No Peer/Other. No Peer means users have no peers. Other means users only need to evaluate their supervisors
- **Supervisor Email**: If user's mail is invalid, system generated mail will send to this address
- **Additional Org.**: only enabled for users whose evaluation role is supervisor. It is used when users are in charge of more than one organizations

3) Click **Save** button to save the changes.

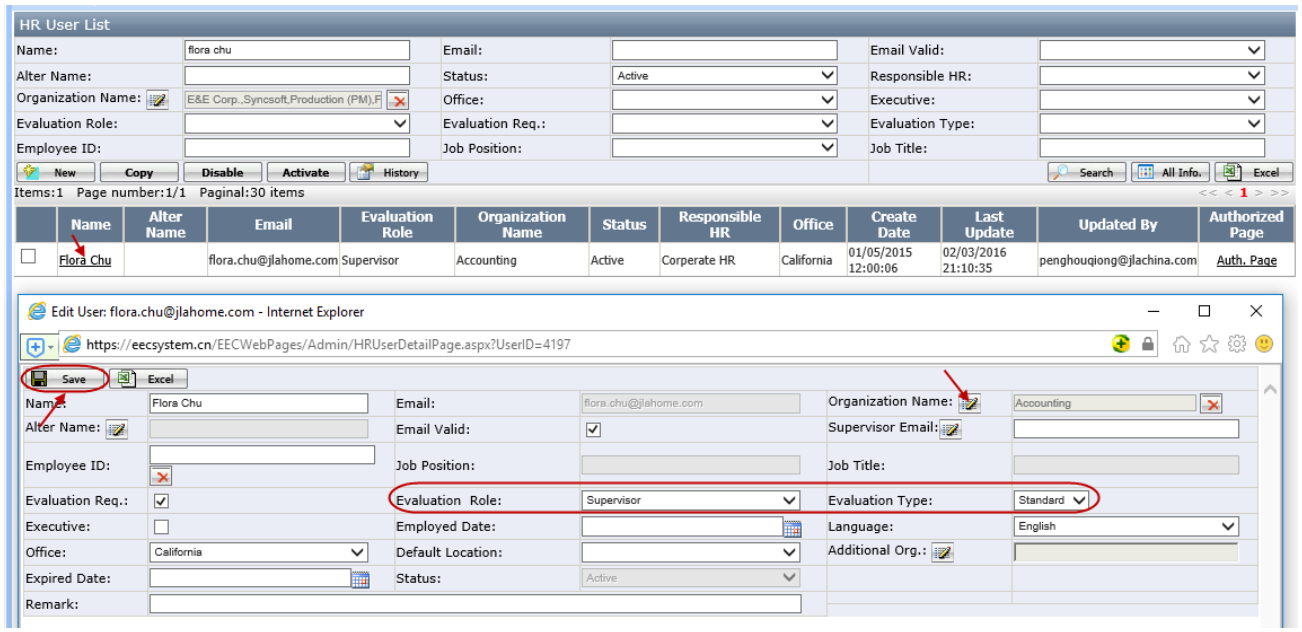
How to Make Changes to Existing User

1) Go HR User List page under **Administration → HR Admin.**



2) Search Out the user by the search criteria.

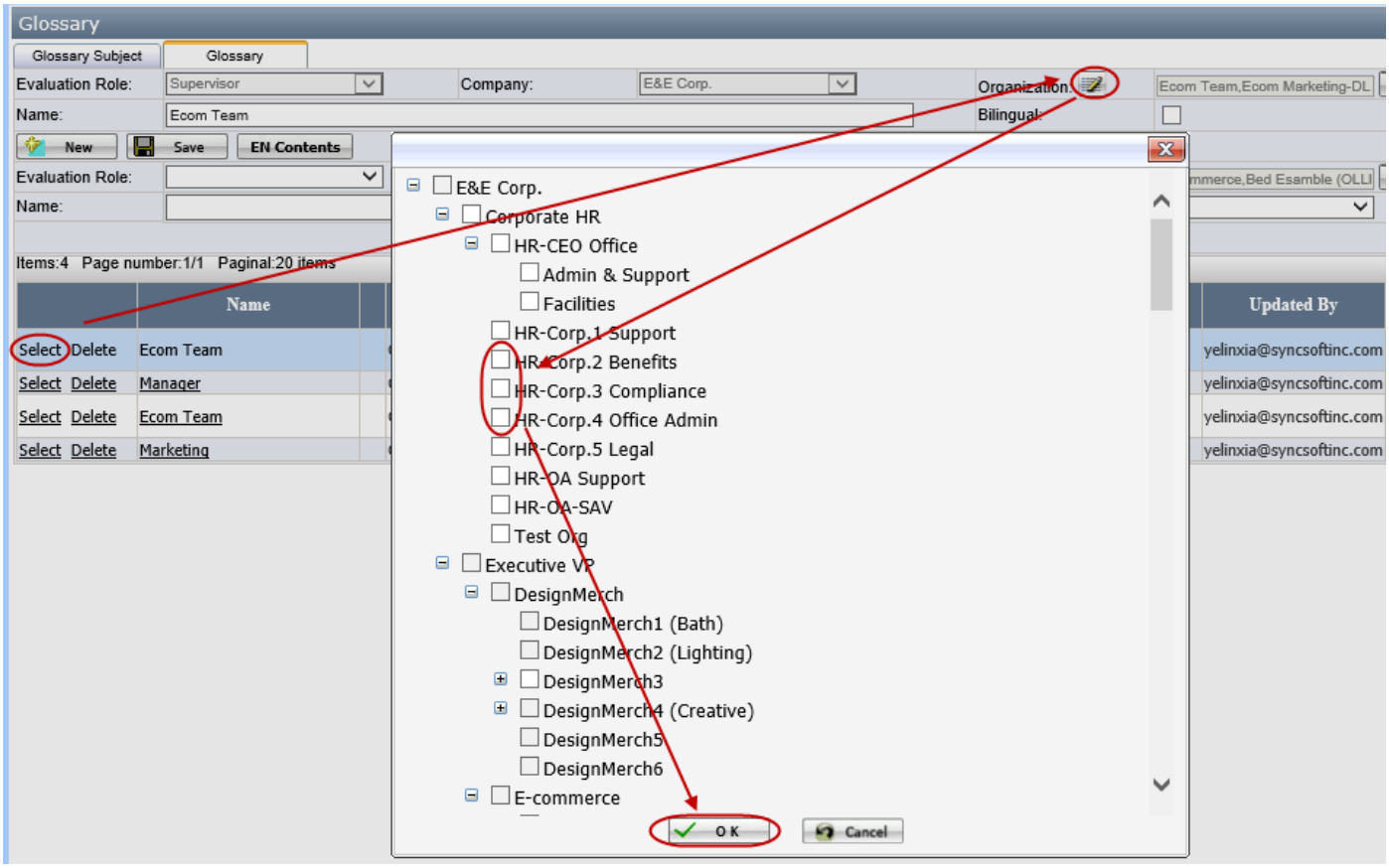
3) Click the user name and update the info on the User Edit page, then click **Save**.



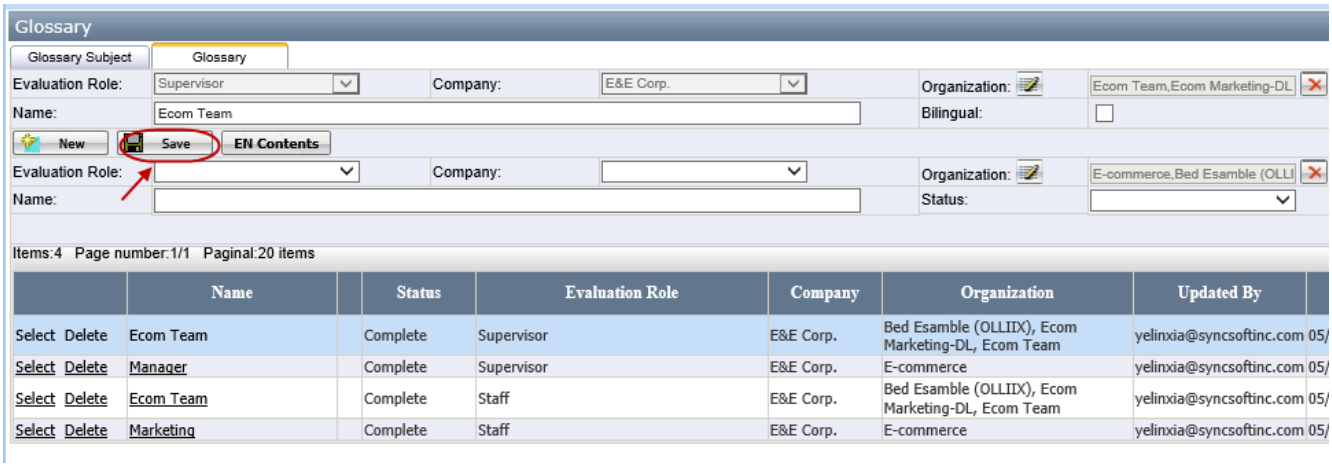
How to Add New Organization to the Existing Glossary

1) Search out the glossary by select an organization.

2) Select the Glossary and open the organization selection page. Select the newly add organization and click OK.

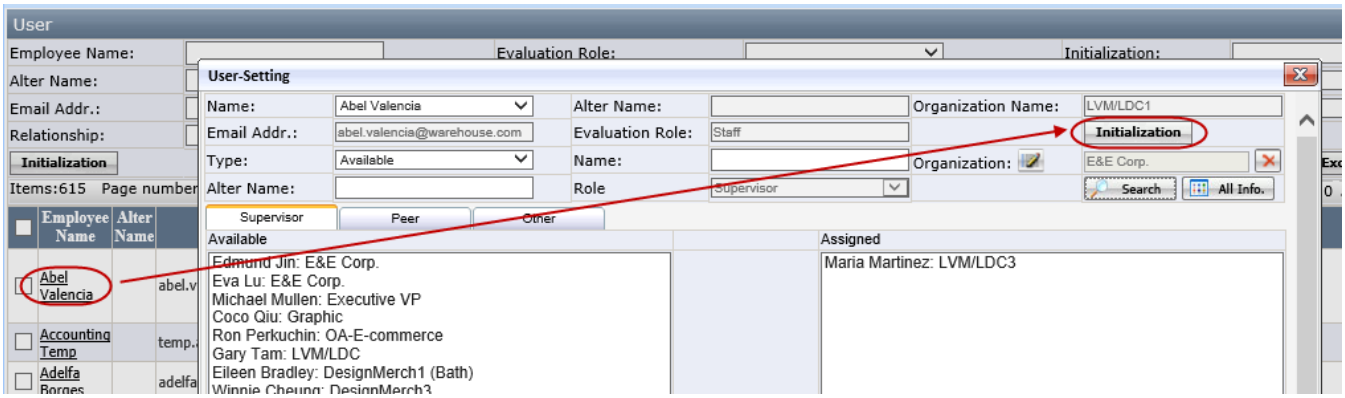


3) Click Save button to save the changes.



How to Re-initialize User

Click an initialized user (whose initialization status is “Yes”) to open the user setting page. There is another **Initialization** button in User setting page. By clicking this button, user can be re-initialized.



Note: This **Initialization** button can be used even if the period is started or there is score with this user. After initialization completed the scores will be cleared.