Performance Measurement System

User Manual
Version 1.0
<table>
<thead>
<tr>
<th>Version No</th>
<th>Created By</th>
<th>Created On</th>
<th>Verified By</th>
<th>Verified On</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Mr. Kalpesh Patel</td>
<td>22/04/2016</td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>1.0</td>
<td>Mr. Kalpesh Patel</td>
<td>23/04/2016</td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
</tbody>
</table>
# Index

1. Purpose ........................................................................................................................................... 4
2. Track Goal Alignment ......................................................................................................................... 5
   a. Login into Portal ............................................................................................................................... 5
   b. Track goal alignment ....................................................................................................................... 6
3. Change Reporting Hierarchy ............................................................................................................. 9
4. Goal / PMS Status ............................................................................................................................. 10
   a) Goal ................................................................................................................................................ 10
   b) PMS ............................................................................................................................................... 11
5. HOD summary .................................................................................................................................. 12
6. SBU Head Summary .......................................................................................................................... 15
7. SBU Wise Percentage ....................................................................................................................... 18
8. Management summary ...................................................................................................................... 20
9. Fill KRA/Self Assessment ............................................................................................................... 23
10. Employee PMS Details .................................................................................................................... 24
11. Reverse Final Summary .................................................................................................................. 25
12. Remove Employee ........................................................................................................................... 26
13. HOD Level Zero summary ............................................................................................................. 27
14. Technical Assistance ....................................................................................................................... 29
1. Purpose

This Application is part of HR Department’s process to acquire employee’s goal alignment and self assessment data to process PMS (Performance measurement system). System has functionality to define goals which later gets approved by Supervisor and HOD respectively. Based on defined / approved goals, user will provide input for achievement against each goal. User also needs to define their training needs, behavioral assessment and snapshot while filling achievement. Defined achievement will goes for approval of respective Supervisor and HOD. Bases on given rating and grades, HOD and SBU Head will submit final summary to HR to close PMS process.
2. Track Goal Alignment
   a. Login into Portal

   Open following link in web browser.
   - Internal Link (On location Cadila Network): [http://hris/HR_PMS](http://hris/HR_PMS)
   - External Link (outside Cadila Network): [http://hris.cadilapharma.in/HR_PMS](http://hris.cadilapharma.in/HR_PMS)

   Enter Employee id and Password to login into portal.

   ![Login Screen](http://hris/HR_PMS/login.jsp)

   On successful login, system will redirect to Home page.

   ![Home Page](http://hris.cadilapharma.in/HR_PMS)
b. Track goal alignment
   o Click on Reports → Track Goal Alignment from Menu.

   o **Note:** System shows menu based on given authentication. Contact Corporate HR authority for further clarification.

   o Enter PMS Year and Select Company.
### Report Description

1. Return.
2. Total **Employees strength** in department.
3. **Eligible** employee strength.
4. Eligible **Level zero employee strength**.
5. Employee count for Employee’s **Goal alignment** Initiated/completed in department.
6. Percentage of **Goal alignment** remaining.
7. Employee count for Employee’s **Self Assessment** Initiated/completed in department.
8. Percentage of **Self Assessment** remaining.
9. Total **Employee strength** for selected company.
10. Employee count for Employee’s **Goal alignment** initiated/completed for selected company.
11. Employee count for Employee’s **Self Assessment** initiated/completed for selected company.

<table>
<thead>
<tr>
<th>Division</th>
<th>Unit</th>
<th>Department</th>
<th>Total Employee</th>
<th>Eligible Employee</th>
<th>Eligible Level zero Employee</th>
<th>Goal Filed</th>
<th>Remaining Goal (%)</th>
<th>PMS Filed</th>
<th>Remaining PMS (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agro</td>
<td>Agro</td>
<td>Administration Office</td>
<td>11</td>
<td>8</td>
<td>2</td>
<td>6</td>
<td>25</td>
<td>6</td>
<td>25</td>
</tr>
<tr>
<td>Agro</td>
<td>Agro</td>
<td>Marketing</td>
<td>50</td>
<td>37</td>
<td>36</td>
<td>1</td>
<td>97.5</td>
<td>1</td>
<td>97.5</td>
</tr>
<tr>
<td>Agro</td>
<td>Agro</td>
<td>Production Office</td>
<td>32</td>
<td>26</td>
<td>10</td>
<td>16</td>
<td>98.66</td>
<td>16</td>
<td>98.66</td>
</tr>
<tr>
<td>Biotech</td>
<td>Biotech</td>
<td>C &amp; M - Mfg Dholka</td>
<td>19</td>
<td>14</td>
<td>1</td>
<td>13</td>
<td>7.24</td>
<td>13</td>
<td>7.24</td>
</tr>
<tr>
<td>Biotech</td>
<td>Biotech</td>
<td>C &amp; M - Mfg Kadli</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>0</td>
<td>100</td>
<td>0</td>
<td>100</td>
</tr>
<tr>
<td>Biotech</td>
<td>Biotech</td>
<td>C &amp; M - R &amp; D Dholka</td>
<td>3</td>
<td>4</td>
<td>1</td>
<td>3</td>
<td>25</td>
<td>3</td>
<td>25</td>
</tr>
<tr>
<td>Biotech</td>
<td>Biotech</td>
<td>General - BUSINESS STRATEGY</td>
<td>4</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Biotech</td>
<td>Biotech</td>
<td>General - GENERAL MANAGEMENT</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Biotech</td>
<td>Biotech</td>
<td>General - Marketing</td>
<td>16</td>
<td>14</td>
<td>0</td>
<td>9</td>
<td>18.31</td>
<td>9</td>
<td>18.31</td>
</tr>
<tr>
<td>Biotech</td>
<td>Biotech</td>
<td>General - Medical Marketing</td>
<td>10</td>
<td>8</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>Admin Office</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>Bond Finished Product</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>66.67</td>
<td>1</td>
<td>66.67</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>Finance</td>
<td>3</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>Finance - Coating</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>HRO</td>
<td>5</td>
<td>4</td>
<td>0</td>
<td>1</td>
<td>10</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>Mfg Production</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>100</td>
<td>0</td>
<td>100</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>Liquid</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>100</td>
<td>0</td>
<td>100</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>Maintenance</td>
<td>11</td>
<td>6</td>
<td>4</td>
<td>2</td>
<td>66.67</td>
<td>2</td>
<td>66.67</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>Production Office</td>
<td>9</td>
<td>5</td>
<td>1</td>
<td>2</td>
<td>33.33</td>
<td>2</td>
<td>33.33</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>Quality Assurance</td>
<td>18</td>
<td>8</td>
<td>5</td>
<td>3</td>
<td>62.5</td>
<td>3</td>
<td>62.5</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>Quality Control</td>
<td>31</td>
<td>11</td>
<td>10</td>
<td>1</td>
<td>90.66</td>
<td>1</td>
<td>90.66</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>SECURITY</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>0</td>
<td>100</td>
<td>0</td>
<td>100</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>SOFEL Maintenance</td>
<td>4</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>50</td>
<td>2</td>
<td>50</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>Softel Production</td>
<td>13</td>
<td>11</td>
<td>6</td>
<td>5</td>
<td>54.55</td>
<td>5</td>
<td>54.55</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>Stores</td>
<td>14</td>
<td>10</td>
<td>7</td>
<td>3</td>
<td>70</td>
<td>3</td>
<td>70</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>Supply Chain</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>C P Jammu</td>
<td>C P Jammu</td>
<td>Tablet</td>
<td>9</td>
<td>4</td>
<td>2</td>
<td>2</td>
<td>10</td>
<td>2</td>
<td>10</td>
</tr>
</tbody>
</table>
Click on **Goal Filled count** to open department specific **Goal alignment status**.

<table>
<thead>
<tr>
<th>Employee No</th>
<th>Employee Name</th>
<th>Status</th>
<th>Pending With</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>View</td>
</tr>
</tbody>
</table>

- **Not Prepared**: Goal alignment not initiated by employee.
- **Not Submitted**: Goal alignment initiated, not submitted for Supervisor / HOD Review.
- **Not Approved**: Goal alignment pending with Supervisor or HOD.
- **Prepared**: Goal alignment approved.

Click on **View** to open KRA/Goal alignment in read-only form.

Click on **PMS Filled count** to open department specific **Self Assessment status**.

<table>
<thead>
<tr>
<th>Employee No</th>
<th>Employee Name</th>
<th>Status</th>
<th>Pending With</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>View</td>
</tr>
</tbody>
</table>

- **Status are same as for Goal alignment**.

Click on **View** to open Self assessment in read-only form.

To track Company specific employee status, click on **Total Goal Filled** and **Total PMS Filled** respectively.
3. Change Reporting Hierarchy

- Modify employee’s current reporting hierarchy.
- Click on Reports → Change Reporting Hierarchy from Menu.

**Note:** System will reset Goals/KRA and Self Assessment, if reporting hierarchy changed for any employee. Once changed, there is no option to reset it.

- Enter appropriate value against each field and Save.
- On successful change, system prompt success message.
4. Goal / PMS Status

- Click on Reports → Goal / PMS Status from menu.

- Select PMS Year and Report type.

- Click on to generate report.

  a) Goal.

<table>
<thead>
<tr>
<th>Company</th>
<th>Division</th>
<th>Unit</th>
<th>Department</th>
<th>Total Employee</th>
<th>Eligible</th>
<th>Prepared &amp; Submitted</th>
<th>Prepared &amp; Not Submitted</th>
<th>Net Prepared</th>
<th>Approved By Superior</th>
<th>Not Approved By Superior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cadila Pharmaceuticals</td>
<td>Corporate</td>
<td>General</td>
<td>Information Technology</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Cadila Pharmaceuticals</td>
<td>Corporate</td>
<td>PI, C &amp; Admin.</td>
<td>HRD</td>
<td>35</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

- Heading.
  i. **Total Employee**: Total Employee strength in Department.
  ii. **Eligible**: Total eligible Employee for selected PMS Year.
  iii. **Prepared & Submitted**: Total employees whose KRA/Goal alignment prepared and Submitted for Supervisor/HOD review and approval.
  iv. **Prepared & Not Submitted**: Total employees whose KRA/Goal alignment prepared but not submitted for supervisor/HOD review and approval.
  v. **Not Prepared**: Total employees whose KRA/Goal alignment not prepared.
  vi. **Approved By Superior**: Total employees whose KRA/Goal alignment approved by Supervisor.
vii. **Not Approved By Superior:** Total employees whose KRA/Goal alignment not approved by supervisor.

b) **PMS.**

<table>
<thead>
<tr>
<th>Company</th>
<th>Division</th>
<th>Unit</th>
<th>Department</th>
<th>Total Employee</th>
<th>Total Eligible</th>
<th>Eligible Level 1 &amp; Above</th>
<th>Supervisor Completed</th>
<th>HOD Completed</th>
<th>HOD Summary Completed</th>
<th>Level Zero Completed by HOD</th>
<th>SBU Head Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cadila Pharmaceuticals Ltd.</td>
<td>Corporate</td>
<td>General</td>
<td>Information Technology</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Cadila Pharmaceuticals Ltd.</td>
<td>Corporate</td>
<td>HR, EC &amp; Admin</td>
<td>HR</td>
<td>10</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

- **Heading:**
  i. **Total Employee:** Total Employee strength in Department.
  ii. **Eligible:** Total eligible Employee for selected PMS Year.
  iii. **Eligible Level 1 & Above:** Total eligible employees of level 1 and above.
  iv. **Level Zero Eligible:** Total eligible employees of Level zero.
  v. **Supervisor Completed:** Total employees whose Self Assessment review and approved by supervisor.
  vi. **HOD Completed:** Total employees whose Self Assessment review and approved by HOD.
  vii. **HOD Summary Completed:** Total employees whose HOD Summary submitted to SBU Head.
  viii. **Level Zero Completed By HOD:** Total employee whose Level Zero Summary submitted to SBU Head.
  ix. **SBU Head Completed:** Total employees whose SBU Head summary submitted by SBU Head.
5. HOD summary

- Used to submit HOD Summary on behalf of HOD.
- Click on Reports → HOD Summary.

- System will show list of HOD.

- Select PMS Year and click on HOD name.
System will open new window for HOD Summary.

- If HOD Summary not initiated, System will automatically retrieve HOD Rating as Supervisor suggested rating.
- Enter grade against each employee, note; System allows user to enter only E, A, B, C and D.
- Suggest Promotion and Market Correction as applicable.
- Click on Update Status to update HOD Summary; System will not forward HOD Summary to SUB Head. System will also update Bell curve parameter on each save.

Click on Show Bell Curve to view bell curve based on updated HOD grade.
- Click on [Final Submit] to submit and approve HOD Summary and forward it to SBU Head for review and approval. **Note:** Once forwarded, Modification not allowed. **System will not track,** which HR person had submitted HOD Summary.
- Click on [Export to Excel] to Export HOD summary in Excel file.
- To view Department wise rating, Select Departments from department list and click on [Display PMS]

<table>
<thead>
<tr>
<th>Department List</th>
<th>Display PMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ankleshwar II-Production</td>
<td></td>
</tr>
<tr>
<td>Ankleshwar II-Engineering Services</td>
<td></td>
</tr>
</tbody>
</table>
6. SBU Head Summary

- Used to submit SBU Head Summary on behalf of SBU Head.
- Click on Reports → SBU Head Summary.

- System will show list of SBU Heads.

- Select PMS Year and click on SBU Head name.
System will open new window for SBU Head Summary.

If SBU Head Summary not initiated, System will automatically retrieve SBU Head Rating as HOD suggested rating.

Enter grade against each employee, note; System allows user to enter only E, A, B, C and D.

Suggest Promotion and Market Correction as applicable.

Click on Update Status to update SBU Head Summary; System will not forward SBU Head Summary. System will also update Bell curve parameter on each save.

Click on Show Bell Curve to view bell curve based on updated SBU Head grade.
Click on **Final Submit** to submit and approve SBU Head Summary. Note: Once submitted, modification not allowed. System will not track, which HR person had submitted HOD Summary.

Click on **Export to Excel** to Export SBU Head summary in Excel file.

To view Department wise rating, Select Departments from department list and click on **Display PMS**.
7. SBU Wise Percentage

- Used to define SBU wise Increment percentage.
- Click on Reports → SBU Wise Percentage.

- System will shows list of SBU Heads.

- Select PMS Year and click on SBU Head name.
Enter **Percentage Increment** (In number only)

Based on Value system will calculate, Probable total Increment and New CTC.

Click on **Is Final** and save. System will update increment percentage for each employees based on their final grade.
8. Management summary

- Used to finalize Increment process.
- Click on Reports → Management Summary.

- System will shows list of SBU Heads.

- Select PMS Year and click on SBU Head name.
System will open new window for Management Summary.

- If SBU wise Percentage not defined, System will not allow opening management summary.
- System will automatically retrieve SBU Head Rating as Management.
- Enter grade against each employee, note; System allows user to enter only E, A, B, C and D.
- Suggest Promotion and Market Correction as applicable.
- Based on given value, system will calculate Prorate Based Increment, Promotion Increment, Total Increment and New CTC.
- HR Needs to provide employee wise Commitment increment in excel file to IT.
Click on **Update Status** to update Management Summary; System will not forward Management Summary. System will also update Bell curve parameter on each save.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Ideal</th>
<th>Actual</th>
<th>Diff %</th>
<th>Diff No</th>
</tr>
</thead>
<tbody>
<tr>
<td>E</td>
<td>15%</td>
<td>33%</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>25%</td>
<td>48%</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>45%</td>
<td>19%</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>10%</td>
<td>0%</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>D</td>
<td>5%</td>
<td>0%</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Click on **Show Bell Curve** to view bell curve based on updated Management grade.

Click on **Final Submit** to submit and approve Management Summary. Note: Once submitted, System will not track, which HR person had submitted Management Summary.

Click on **Export to Excel** to Export Management summary in Excel file.

To view Department wise rating, Select Departments from department list and click on **Display PMS**.
9. Fill KRA/Self Assessment

- HR person can submit KRA/Goal and Self Assessment on behalf of employee.
- Click on Reports → Goal / PMS Status from menu.

- Select type (Goal → Goal alignment, Self Assessment → Self Assessment) and employee id.

- Click on Generate.
  - **Goal**: open goal alignment screen.
  - **Self Assessment**: open self assessment screen.
  - For clarification in KRA/Goal Alignment and Self Assessment, refer Employee user Manual - PMS.
  - **Note**: System will not track, which HR person had submitted KRA/Goal and self assessment.
10. Employee PMS Details

- Generate PMS detailed report.
- Click on Reports → Employee PMS Details from menu.

- Select PMS year and click on Generate to download report dump in excel format.
11. Reverse Final Summary

- Reverse HOD and SBU Head summary.
- Click on Reports $\rightarrow$ Reverse Final Summary from menu.

- Enter appropriate value and click on Submit to reverse summary.
- **Note:** System will update only status [System will not reverse Grade, Market Correction and promotion modification]. System allows reversal of summary for current PMS year only.
12. Remove Employee

- Remove employee from eligible employee list.
- Click on Reports → Remove Employee from menu.

- Enter employee no and click on ...
- Note: Applicable for Current PMS Year only.
13. HOD Level Zero summary

- Click on Reports → HOD Level Zero Summary.

- System show list of HOD.
Select PMS Year and click on HOD Name.

Enter grade against each employee, note; System allows user to enter only E, A, B, C and D.

Suggest Promotion and Market Correction as applicable.

Click on to partially save Level Zero Summary, system will not send it to SBU Head review and Approval.

Click on to submit and approve Level Zero Summary for SBU Head review and approval. Note: Once forward, Modification not allowed once forwarded to SBU Head.

Note: System will not track, which HR person had submitted KRA/Goal and self assessment.
14. Technical Assistance

For any Technical need, please log a call in IMS, under PMS Service line.