

Play-Around Synergita Test-Drive

A guide to Synergita PMS



1 Contents

2	Introducing Synergita.....	4
2.1	Solutions offered by Synergita.....	4
3	Test Drive Credentials.....	5
4	Objectives of Test-Drive.....	5
5	Managing Perspective.....	5
5.1	Home Screen.....	6
5.2	Dashboard.....	7
5.3	People.....	9
5.3.1	My Profile.....	9
5.3.2	My Team – Profile.....	10
6	Employee Engagement.....	10
7	Manager’s Perspective – Performance.....	13
7.1	My Performance.....	13
7.2	My Team’s Goals.....	14
7.3	My Team’s Performance.....	15
7.4	My Action Item.....	15
7.4.1	Set Goals.....	16
7.4.2	Continuous Feedback Tagging Employee Goals.....	16
7.4.3	Provide Feedback.....	17
7.4.4	Meeting Summary.....	18
8	Normalization.....	19
9	Employee Development.....	20
10	HR Admin.....	21
10.1	Manage Feedback Cycle.....	21
10.2	Manage Continuous Feedback Categories.....	22
10.3	Manage Feedback Form/Template.....	23
10.4	Manage Workflow.....	24
10.5	Manage Email Notification.....	24
10.6	Manage Grade Scale.....	25
11	Reports.....	25
a.	Employee Reports.....	25

b.	Performance Reports	26
11.1	Employee Reports	26
11.2	Performance Report.....	27
11.2.1	Feedback Status Report	27
11.2.2	9 Box Analysis Report.....	27
11.2.3	Perception Gap Analysis.....	29
11.2.4	Continuous Feedback Report.....	31
12	Conclusion.....	31

2 Introducing Synergita

Synergita is a Continuous Employee Performance, Engagement & Development software. Helps in building a world-class company culture driven by peer recognition

When organizations remove the hurdles their employees face, engage with them on their needs and nurture and develop them, they create an extraordinary culture where employees unleash their potential, set new standards of excellence and create wonders. We call it peopleMAGIC.

And it is made possible by Synergita's cloud based performance management and analytics solution. Having seen the challenges that HR goes through in managing talent in several different organizations and the need to bring the performance management and feedback systems more closely to the business and people, we have built this software which can bring in best practices for employee performance management and development.

2.1 Solutions offered by Synergita

Synergita is full-fledged employee performance management software covering Employee talent information, employee performance (goals, competencies), employee engagement, employee development, etc.



3 Test Drive Credentials.

There are three key stakeholders – Employee, Manager and HR. This document will help in walking through the use cases from manager and HR perspective.

Role	Username	Password
Manager	*****	*****
HR	*****	*****
Employee	*****	*****
URL - *****@synergita.com		

Required Duration to review this document : 10 minutes Required
duration to complete this test drive play : 40 minutes

We have a knowledgebase and it can be accessed at <http://support.synergita.com>

4 Objectives of Test-Drive

- The test drive will help the user to navigate multiple functionalities in the software.
- The user can understand the effectiveness of multiple functionalities from HR and Manager Perspective. User can understand the simplicity of the software, how easy it is to provide continuous feedback, set goals, do performance reviews, etc.
- From HR perspective, it will be easy to see the kind of reports available and how to administer the software.
- The look and feel of the software can be experienced using this test-drive.

5 Managing Perspective

Now, let's see few important use cases from a Manager's Perspective. The following are the high level actions that a Manager can perform in the Test Drive.

- Snapshot of the dashboard – High level summary of the team's information.
- Manager can review their team members profile
- Manager can set goals for their team members
- Manager can provide continuous feedback
- Manager can provide feedback and appraisal cycle related activities

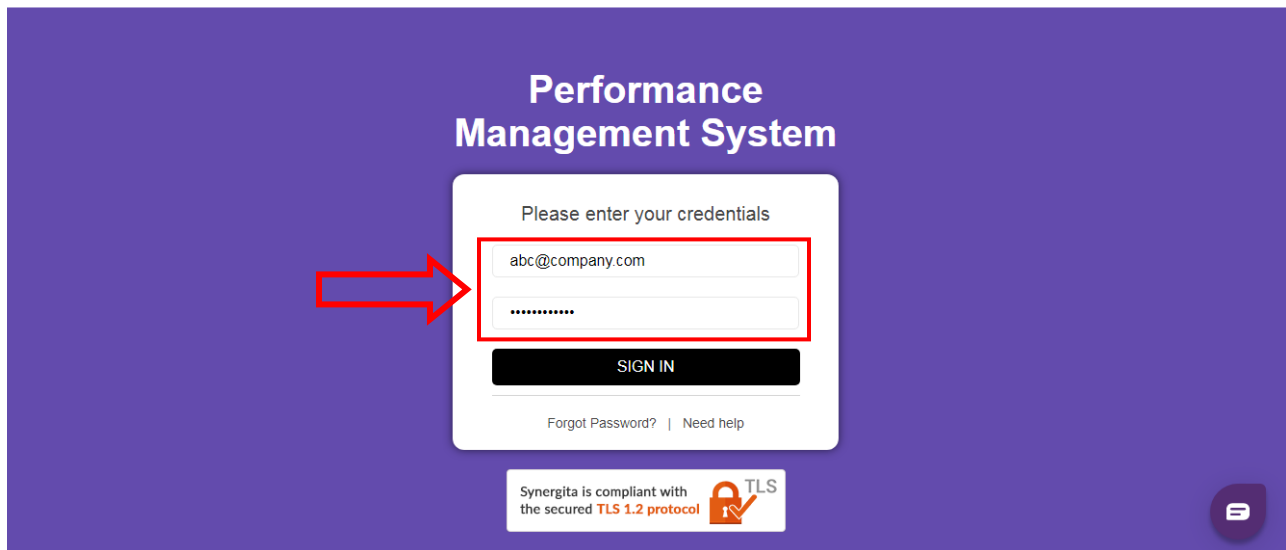


Figure 1 - Login Page of Synergita

5.1 Home Screen

Home screen is the landing page in Synergita. The contents of the home screen are configurable and can be frequently updated by the HR admin.

Help documentations / User Manuals will be available in the home screen.

Synergita is intuitive, flexible, simple and easy to use.

Left hand navigation menus are straight forward. It contains Home, My Dashboard, Profile (For talent information), Performance (For performance related information), Engagement (Continuous Feedback), Development (My training and My team's training), etc.

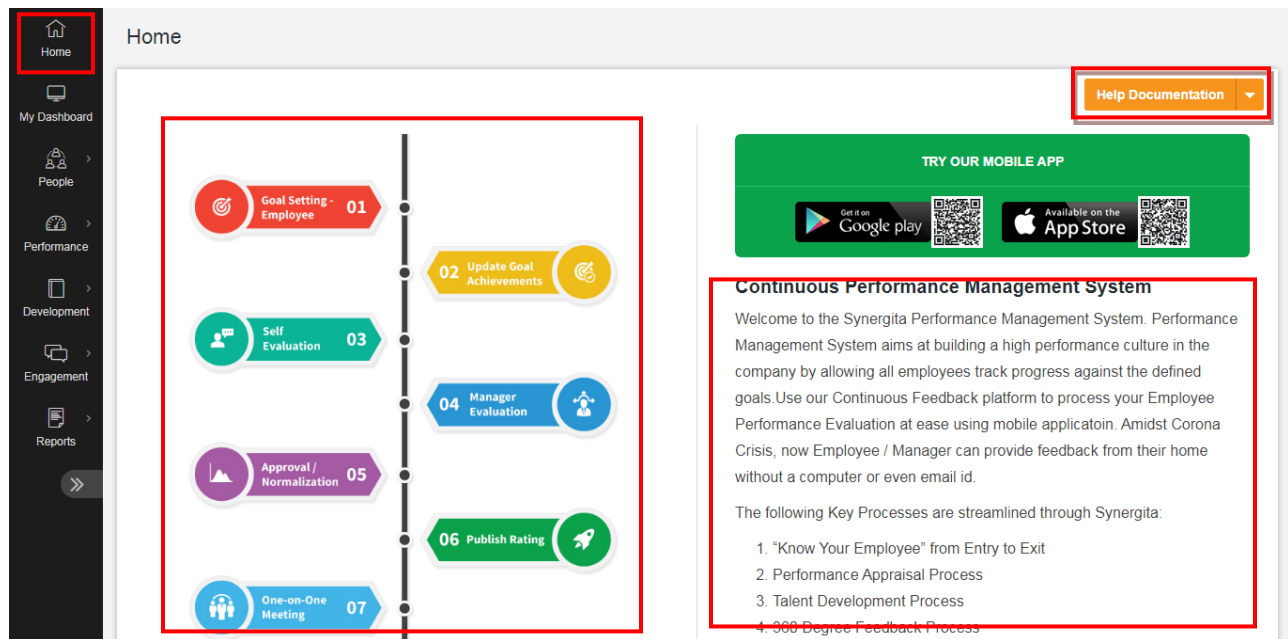


Figure 2 - Home Page / Landing Page

5.2 Dashboard

All the key information, action updates & pending actions will be available in the dashboard and presented in the form of Analytical Widgets.

Adding a widget is easy. Just click the add widget floating icon on the right-side middle of the screen. Select a widget and click add. This will add a new widget in the dashboard. These widgets can be rearranged in the dashboard by simple drag and drop feature.

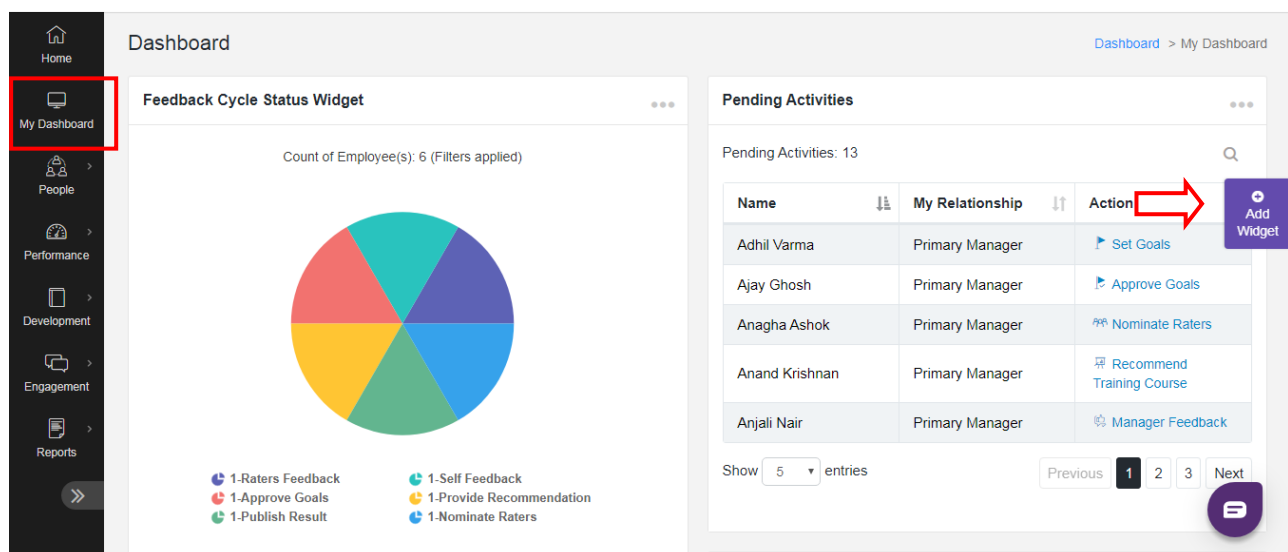


Figure 3 – Dashboard

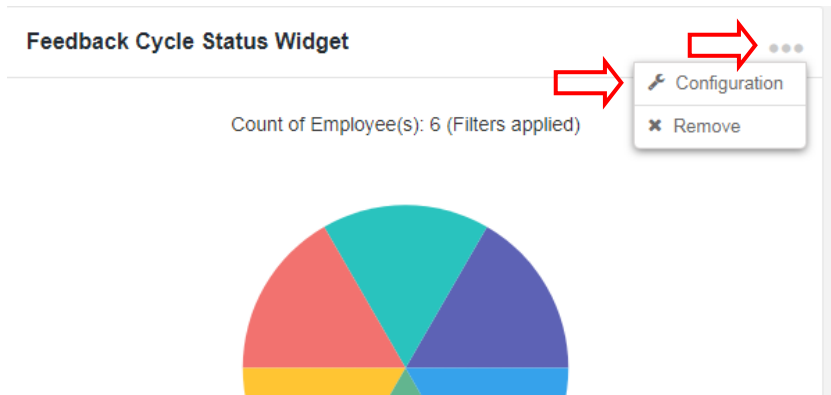


Figure 4 - Advance Filter options for Widgets

All the widgets come with advanced filter option. By clicking the options button (Three dots) reveals the configuration option. Using this the focus area can be broadened or narrowed.

Feedback Cycle Status Widget Configuration

Name : Feedback Cycle Status Chart Type : Pie

From Date : To Date :

Organization Unit : Multiple items select Location : Multiple items select

Designation : None Selected

Work Role : None Selected

Feedback Cycle :

☒ Select All Ongoing Cycles

Feedback Cycle : 2 Selected

Drill Down Grid Settings

Available Fields : Designation Display Fields : First Name Last Name

Figure 5 - Advanced filter options for Widgets

“Synergita, has a built-in notification engine, this will enable to trigger automated emails for various activities. It will save lot of time for HR and managers, and help to complete the entire process on- time. Basically, the system takes care of the operational activity”

5.3 People

Helps to maintain employee records electronically. It is also easy to update & maintain the records up-to-date for data accuracy.

- Maintain & Manage complete Employee Information
- Maintain Reporting Structure (Employee Relationships)
- Matrix Reporting structure will enable one or more relationship to review the employee performance (Co-manager, peer, Skip – level manager etc.).
- Maintain Skill Sets, Experience & Education details
- Maintain Passport & Visa Details
- Upload Reference Documents

5.3.1 My Profile

My Profile Home > People > My Profile

Ravi Vyas
Project Lead
A021
ravi@car.com

Primary Manager: **Ramesh Kumar**
Date of Joining: **24-Feb-1995**
[Download Employee Career Summary Report](#)

[Career History](#) [Performance](#) [Training](#) [Continuous Feedback](#)

My Direct Reportees (28)

Ajay Ghosh
Senior Engineer
A029

[Organization](#) [Reporting Structure](#) [Personal Details](#) [Passport & Visa](#) [Education](#) [Experience](#) [Skills](#) [Career As](#)

BASIC DETAILS

First Name*	Last Name*	Date of Joining
Ravi	Vyas	24-Feb-1995
Employee Type	Employee Type Effective From	Employee Number
Regular	24-Feb-1995	A021

Figure 6 - My Profile

As a manager, Team's employee profile can be accessed in People → My Team

5.3.2 My Team – Profile

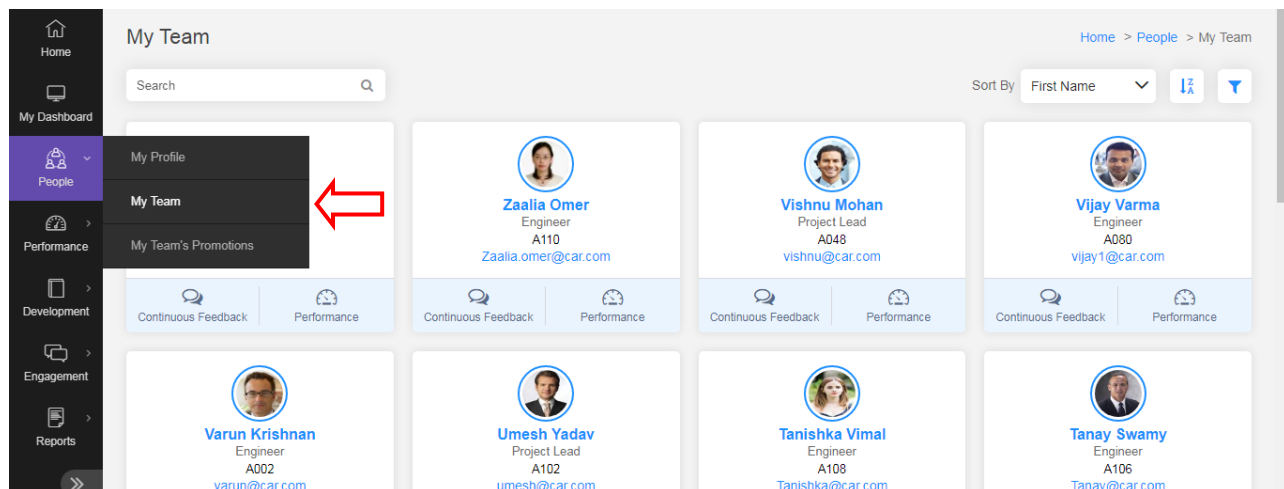


Figure 7 - Team's profile

6 Employee Engagement

- Click Engagement → Continuous Feedback
- You can appreciate, award, give course corrective inputs etc on the go to an employee using continuous feedback module.
- All the continuous feedback categories that has the visibility settings as public will be displayed in the continuous feedback wall, which can be seen by the entire organization.

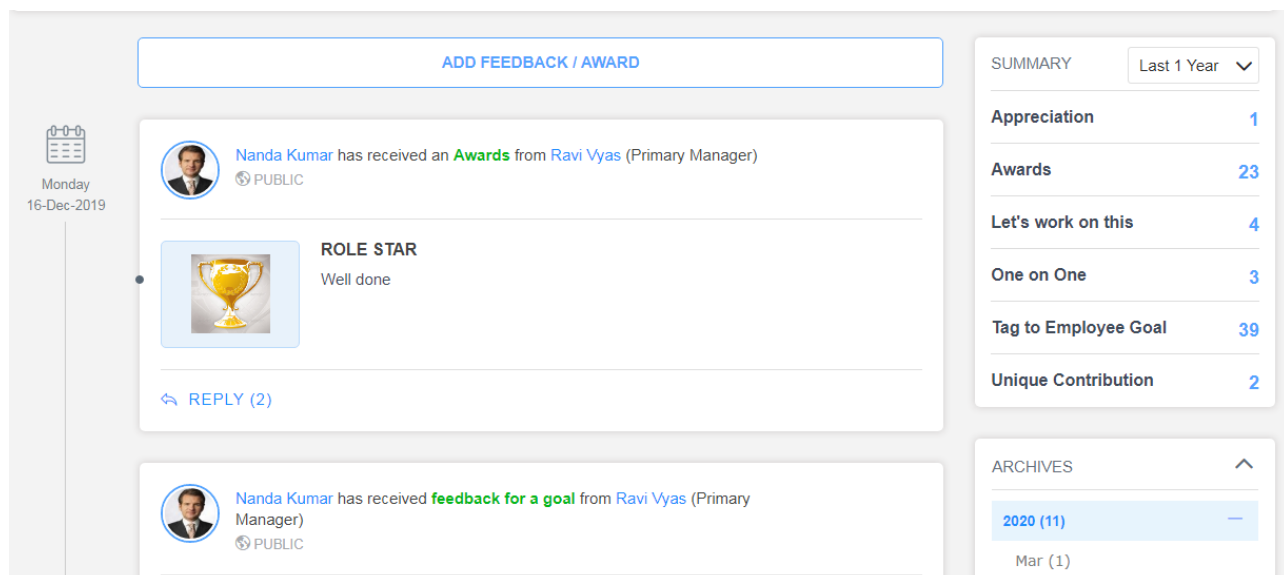


Figure 8 - Continuous Feedback Wall


- Below figure illustrated how to provide a continuous feedback.
- Step 1: Choose an employee to provide continuous feedback
- Step 2: Choose a category (Check the visibility of the categories. Eg Public, Private, Restricted etc)
- Step 3: Type in your comments. (Adding picture, adding emoji's & adding attachment are optional)
- Step 4: Post your continuous feedback

1

2

3

CHOOSE AN EMPLOYEE TO PROCEED FURTHER



Asha sarath
Engineer

×

[View Employee Directory](#)

SELECT CATEGORY

☐ Awards
Public



☐ Let's work on this
Restrict To

☐ One on One
Private


☒ Unique Contribution
Public

☐ Tag to Employee Goal
Public

COMMENT

Good job on the last product release.



Note: Maximum image dimension of 1300(width) x 813(height) and minimum dimension of 60(width) X 60(height) are supported

Drop files here to upload

Note: You can add maximum of 3 attachments. Supported file types - pdf, xls, doc

Provided By
Ravi Vyas

Provided On
06-Apr-2020

CANCEL

POST

Figure 9 - Provide Continuous Feedback

7 Manager's Perspective – Performance

7.1 My Performance

- Select Performance → My performance and you can see the following tabs.

Tabs	Content
My Goals & Competencies	The User can access his/her goals and competencies under View Goals
View Past Feedback	All the past feedback data can be accessed here. Also the data can be exported.
Continuous Feedback	All the continuous feedback received by the user will be available here
Employee Performance Metrics	Achieved targets
Score Trend	Scores from all the previous cycle will be available for comparison.

My Performance

Home > Performance > My Performance

Manage Goals/Revise Goals Review PIP Self Feedback

My Goals and Competencies View Past Feedback Continuous Feedback Employee Performance Metric Score Trend

Performance Appraisal Plan Review Period Review Period Test PIP Review Period PIP

Export to Excel Supporting Documents (0) Update Achievement

Expand All Collapse All

SMART GOALS 20% ^

SMART Goal Name	Description	Measure	Target	Start Date	Due D
Quality Of Deliverables View Linked Goals	A project's ultimate success is attributed to two key factors: the completion of the requirements as dictated by the scope and the inherent quality of the deliverables.	Testing Reports	100	01-Nov-2019	25-No
Timeliness View Linked	The immediate goal about software testing is to find errors at any stage of software development. More	Testing Reports	90	01-Nov-2019	25-No

Figure 10 - My Goals & Competencies

My Dashboard

My Goals and Competencies View Past Feedback Continuous Feedback Employee Performance Metric Score Trend

View Past Feedback

Performance Appraisal Plan Cycle Name Appraisal Cycle 2015 - 2016 PIP

Ravi Vyas
AR Executive
Ravi@Car.Com

Cycle Related Info
Employee Number : A021
Designation : AR Executive

Primary Manager : Ramesh Kumar
ReviewPeriod : Default

Export as: [Icon]

RECOMMENDATION ^

RATING SUMMARY ^

FEEDBACK ^

Rating: All [Dropdown] Show Not Rated

1.92 Self Score 1.82 Primary Manager Score

Figure 11 – View Past Feedback

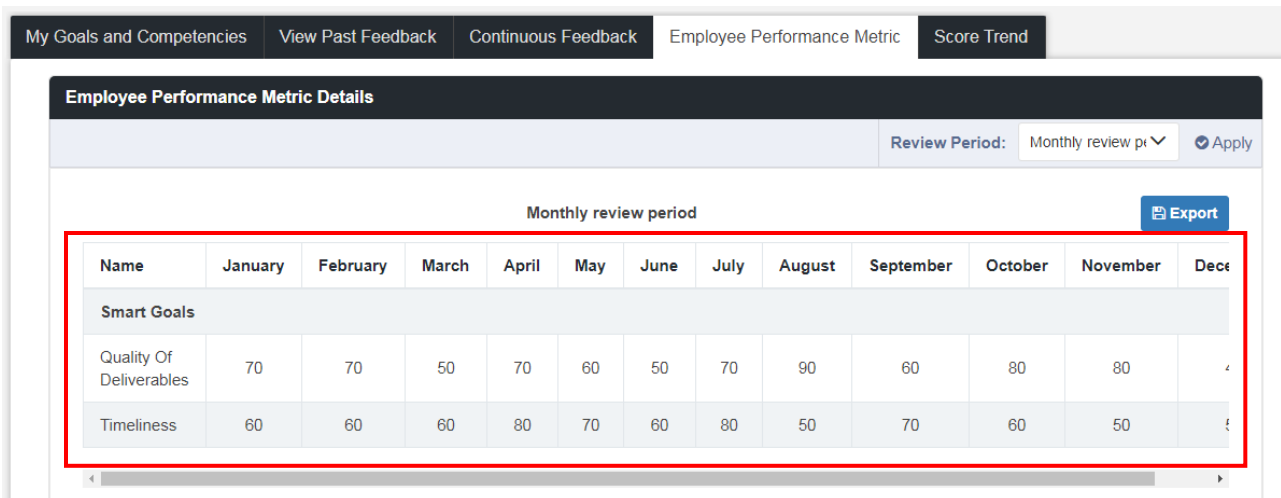


Figure 12 - Employee Performance Metrics

7.2 My Team's Goals

- Click Performance → My Team's Goals
- Helps to track team members' goals in real time.

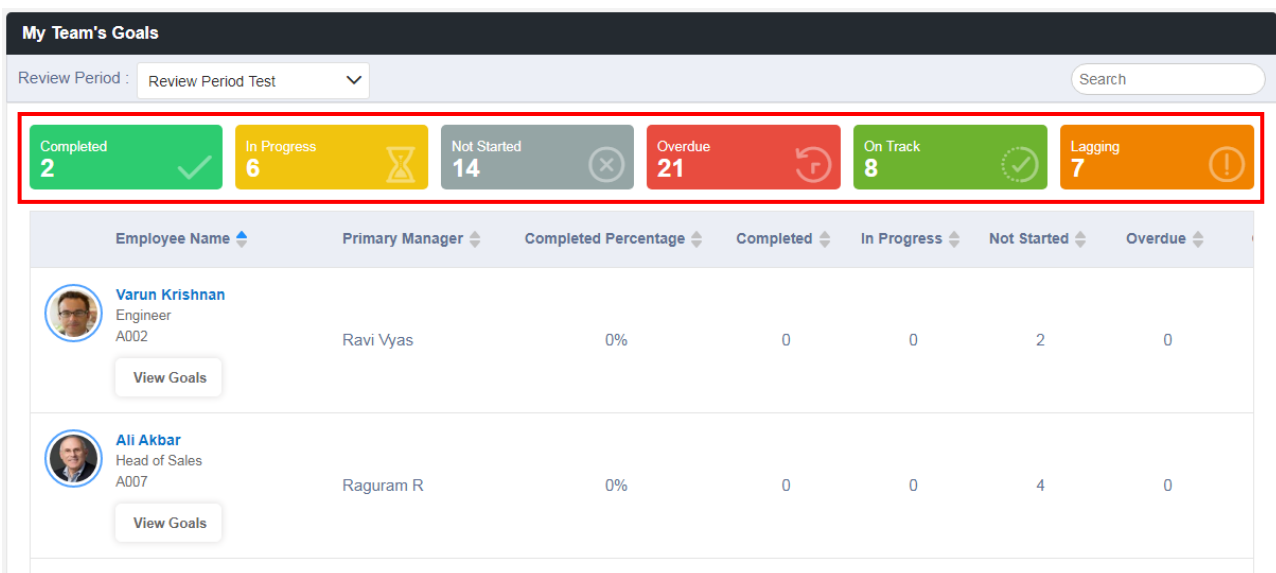


Figure 13 - My Team Goals

7.3 My Team's Performance

- Click Performance → My Team's Performance
- Manager can access team's performance related data in this page.

My Team's Performance Home > Performance > My Team's Performance

Search [MANAGE APPROVAL\(S\)](#) Status: All Sort by: First Name







 Abhilash Kumar Engineer A090	Review Cycle Name --NA-- Status --NA-- My Relationship Primary Manager Reporting to Ravi Vyas	 Adhil Varma Engineer A101	Review Cycle Name Appraisal Cycle-2018-2019 Status Set Goals My Relationship Primary Manager Reporting to Ravi Vyas	 Ajay Ghosh Senior Engineer A029	Review Cycle Name Appraisal Cycle-2018-2019 Status Approve Goals My Relationship Primary Manager Reporting to Ravi Vyas
 Alexander John CEO A150	Review Cycle Name --NA-- Status --NA-- My Relationship --NA-- Reporting to --NA--	 Ali Akbar Head of Sales A007	Review Cycle Name Appraisal Cycle-2018-2019 Status Set Goals My Relationship --NA-- Reporting to Raguram R	 Anagha Ashok Engineer A084	Review Cycle Name Appraisal Cycle-2018-2019 Status Nominate Raters My Relationship Primary Manager Reporting to Ravi Vyas

Figure 14 - My Team's Performance

7.4 My Action Item

- Click Performance → My Action Items
- Individual can see their pending activities here.
- The activities might vary based on Organization traditional workflow/process.

My Action Items Home > My Action Items > My Action Items

Search [MANAGE APPROVAL\(S\)](#) Status: All Sort by: First Name







 Adhil Varma Engineer A101	Review Cycle Name Appraisal Cycle-2018-2019 My Relationship Primary Manager	Set Goals	 Ajay Ghosh Senior Engineer A029	Review Cycle Name Appraisal Cycle-2018-2019 My Relationship Primary Manager	Approve Goals
 Anagha As... Engineer A084	Review Cycle Name Appraisal Cycle-2018-2019 My Relationship Primary Manager	Nominate Raters	 Anand Kris... Project Lead A042	Review Cycle Name Appraisal Cycle-2018-2019 My Relationship Primary Manager	Recommend Training Course
 Anjali Nair Engineer A082	Review Cycle Name Appraisal Cycle-2018-2019 My Relationship Primary Manager	Manager Feedback	 Asha sarath Engineer A008	Review Cycle Name Appraisal Cycle-2018-2019 My Relationship Primary Manager	Provide Performance Potential And Critical Rating

Figure 15 - My Action Item

7.4.1 Set Goals

- Manager can set goals for the team members along with weightages during the beginning of the year. This helps the employee notified about their goals well advanced. Note: Employee can also do set goals activity.
- Our **“Goals Library”** will enable Manager to select the appropriate goals for the employee.

Development
Engagement
Reports

CHOOSE FROM LIBRARY COMMENTS (0) SUPPORTING DOCUMENTS (0)

Expand All Collapse All Export as: [icon] SAVE ALL SUBMIT

Smart Goals -> 20%

SMART GOAL NAME	DESCRIPTION	GOAL TARGET TYPE	TARGET	START DATE	DELETE
Target	Number of printers sold	Number	100	08-Feb-2	[trash icon]
		Number			[trash icon]

1994 Characters Left 1977 Characters Left 2000 Characters Left 2000 Characters Left

Link Goals

ADD GOAL (Remaining weightage to be added : 75%)

Figure 16 - Set goals

The manager can easily add goals, competencies directly from the “Goals Library”. It speeds up the process and will save a significant amount of time for the manager.

7.4.2 Continuous Feedback Tagging Employee Goals

- This Feedback can be given against an employee’s goal on the go at any point of time.
- This is one of the categories in continuous feedback
- Click Engagement → Continuous Feedback
- Choose an employee to give a feedback.
- Then select “Tag to Employee Goal” from the category list.
- Now the system displays the list of goal the particular employee for this current review period.
- Choose a goal from the list and provide your comments / mid-flight corrections / appreciation / action plan to achieve the goal. etc.
- These feedbacks provided against goals will be available for reference in all the feedback pages under that particular goal.

3

4

☐ One on One
Private

☐ Unique Contribution
Public

☒ Tag to Employee Goal
Public

TAG

Monthly review period ▼

SMART GOALS

☐ **Pipe line strength**
 Steps salespeople take from initial contact with a potential customer, or prospect, to qualifying that prospect into a lead, and further validating that lead into a sales opportunity followed through the different stages until closed. All sales opportunities arranged along each of the sales steps that make up your sales process is what the sales pipeline represents.

☐ **Sales Target (Individual)**
 A sales target is the number of products you need to sell to make a desired profit. As an individual is he able to make a good contribution to achieve the teams target? how many products he is selling?

☐ **Project Related - Profitability**
 Project Profitability computed across all project handled by the PM.

☐ **Sales Target (Team)**
 A sales target is the number of products you need to sell to make a desired profit. Sales targets allow you and your sales staff to: set clear goals, pursue incentives and bonuses that motivate and reward. As a team how many products they were able to sell.

COMMENT

Figure 17 - Tag to employee goal

7.4.3 Provide Feedback

- Click Performance → My Action Items → Self-Feedback (OR) Manager Feedback
- Self can provide their own rating and also manager can provide rating to the employees.
- Co-manager can also provide the feedback and primary manager can refer to self-feedback and co-manager feedback while providing his/her rating.

Coding Skills
Develop code by choosing an appropriate logic and adhere to the coding standards and guidelines.

Unit Testing and Review
Is there a tendency to skip Unit testing (especially when faced with delivery pressure)?
Do the seniors need to spend multiple loops/reminders to get the ratee to do Unit testing?
Do the unit tests written by the ratee stand on their

RATING ⓘ

Met Expectations ▼

FEEDBACK:

She has done a excellent job in coding and development

1946 Characters Left

[Attach File](#)

RATING ⓘ

Please Select ▼

FEEDBACK:

Anjali Nair

4 / 4 ★ ★ ★ ★

Above Expectations

(Self)

Self Feedback

Anjali Nair

3 / 4 ★ ★ ★ ☆

Met Expectations

(Self)

Self Feedback

Figure 18 - Manager Feedback

- Manager can view continuous feedback, past performance, etc. easily in the same page while providing the feedback to the team member.
- Click on related feedback option on the right side of the screen

Coding Skills
Develop code by choosing an appropriate logic and adhere to the coding standards and guidelines.

Unit Testing and Review
Is there a tendency to skip Unit testing (especially when faced with delivery pressure)?
Do the seniors need to spend multiple loops/reminders to get the ratee to do Unit testing?
Do the unit tests written by the ratee stand on their own, or are they heavily dependent upon code external to the unit being tested?
Does the ratee know/use various tools/technologies for doing manual/automated unit testing and self-reviews?
Does the ratee know/use various tools/technologies

RATING ⓘ
Met Expectations ▼

FEEDBACK:
She has done a excellent job in coding a development

1945 Characters

Attach File

RATING ⓘ
Please Select ▼

FEEDBACK:

2000 Characters

Attach File

Current Cycle Feedback

Anjali Nair	Self	3.13	View
Ramesh Kumar	Skip Level Manager	N/A	NR

Showing 1 to 2 of 2 entries

Previous Cycle Feedback

[View Score Trend Analysis](#)

Appraisal Cycle 2016 - 2017	2.94	Valued Performer	View
Appraisal Cycle 2015 - 2016	3.59	Excellent Performer	View
Appraisal Cycle 2014 - 2015	2.84	Valued Performer	View

Showing 1 to 3 of 3 entries

Continuous Feedback

[View Continuous Feedback](#)

Figure 19 - Related Feedback

7.4.4 Meeting Summary

- Manager can schedule the one-on-one meeting with an employee to have a discussion about their performance.
- All the discussion pointers can be recorded in meeting summary activity.

FEEDBACK ▼

ONE ON ONE DISCUSSION ^

You can save the form and resume at a later time. Once you complete, please submit the form.

Meeting Date	<input type="text" value="03-Apr-2020"/>
Meeting Summary	<input type="text"/>

2000 Characters Left

[Save](#) [Submit](#)

Figure 20 - One on One discussion

8 Normalization

- Click Performance → Normalization
- Ability to review the rating distribution at different levels such as Organization units, locations, teams.
- Line managers and department heads can generate Bell Curve for their units separately

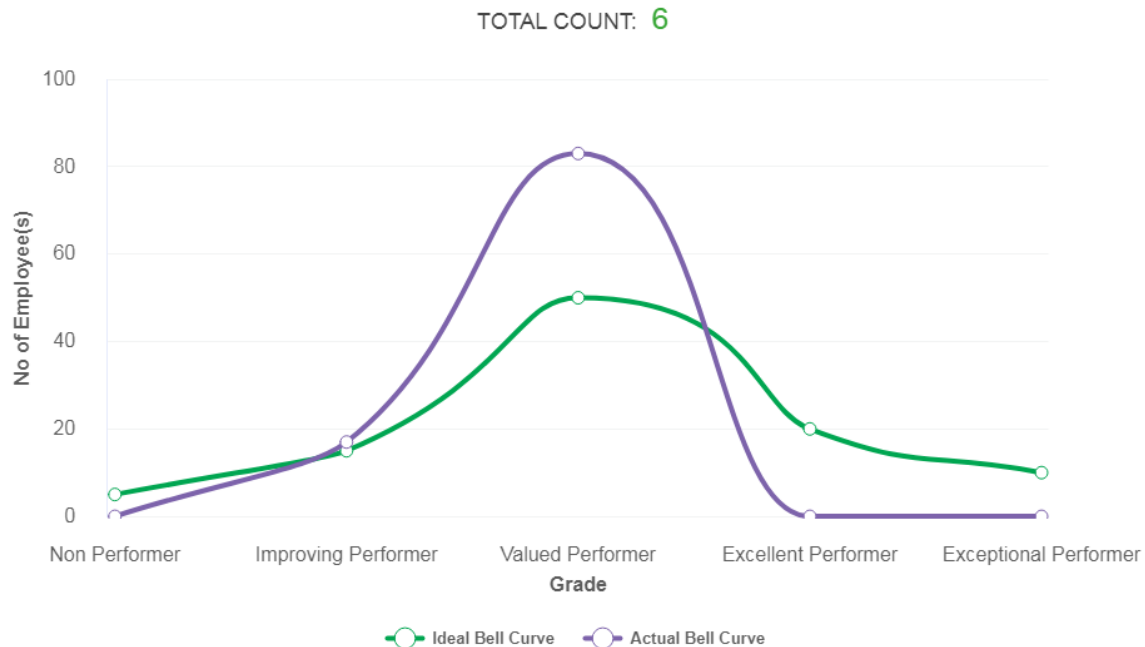


Figure 21 - Bell Curve







EMPLOYEE INFO	JOININGDATE	SCORE	GRADE	MYRELATIONSHIP
 Nadish Mehta Engineer A0152	22-Feb-2017	2.41	Valued Performer	Primary Manager
 Sameer sharma Senior Engineer A041	01-Mar-1996	2.39	Valued Performer	Primary Manager
 Anand Krishnan Project Lead A042	15-Jul-2002	2.30	Improving Performer	Primary Manager
 Keerthi Raman Engineer A043	10-Apr-2016	2.57	Valued Performer	Primary Manager
 Mukesh Sharma Project Lead A051 ACTION	01-Sep-2006	3.80	<div> Valued Performer Non Performer Improving Performer Valued Performer Excellent Performer Exceptional Performer </div>	Primary Manager
 Karthik Prabakar Project Manager	29-Aug-2017	2.45		Primary Manager

Figure 22 - Force fitting the Bell Curve

- In cases of deviation in the rating distribution, final ratings can be modified and the Bell Curve refreshes automatically. Bulk approval/reject option helps to save maximum time of the user.
- Aligning to the Ideal bell curve is very simple and it saves significant time and effort for the Manager or HR.

9 Employee Development

- Click Development → My Training
- This provides the training details of the logged in User.
- Click Development → My Team Training.
- Manager can now see team's training details and also can recommend training programs.

My Training

[Pending Training Courses \(2\)](#) [Training Log \(2\)](#)

Search ☐ Overdue Courses

COURSE NAME
Financial Management

CATEGORY
Management Skill

RECOMMENDED BY
Primary Manager

DUE DATE
19-Nov-2020

COURSE NAME
Recruitment Management

CATEGORY
Management Skill

RECOMMENDED BY
Primary Manager

DUE DATE
31-Dec-2020

Figure 23 - My Training (Pending Training Courses)

My Training [Home](#) > [Development](#) > [My Training](#)

[Pending Training Courses \(2\)](#) [Training Log \(2\)](#)

Search **TOTAL HOURS: 21.00** [ADD LOG](#)

CATEGORY	COURSE NAME	NO. OF HOURS	ATTENDED DATE	EXTERNAL TRA	Action
English Communication Courses	English course - Writing	5	16-Sep-2019	mark	
Communication Skill	Communication Skills	16	01-Aug-2018	mark	

Showing 10 entries of 2 [1](#)

Figure 24 - My Training (Training Log)

- Training log can be maintained in Synergita as show above.

My Team's Training

Search [] Sort By: First Name [v]

Name	Role	Pending Training Courses	Recommend Training Courses
Abhilash Kumar	Engineer	4	
Adhil Varma	Engineer	4	
Ajay Ghosh	Senior Engineer	2	
Anagha Ashok	Engineer	3	
Anand Krishnan	Project Lead	4	
Anjali Nair	Engineer	2	
Asha sarath	Engineer	3	
Asma Khan	Project Manager	2	

Figure 25 - My Team's Training

10 HR Admin

- Login as a HR by using the credentials given to you.
- HR can see the high-level analytical widgets for the entire organization and can track information based on their needs with the help of widget configuration.

10.1 Manage Feedback Cycle

- HR team can initiate the appraisal cycle on Monthly/Quarterly/Bi-Annual and Annual basis.
- Select Admin → HR Administration → Manage Feedback cycle.

Manage Feedback Cycles Home > Admin > HR Administration > Manage Feedback Cycles

Feedback Cycles

Start Date Range: [Start] To [End] Clear ☐ Show Open Cycles Search [] **+ ADD**

Feedback Cycle has been deleted.

Name	Description	Start Date	End Date	Feedback Provider Group	Is Qualitative	Status	WorkFlow	Action
Holacracy Process	Holacracy Process	01-Jul-2019 00:00	31-Dec-2020 23:59	Car Infotech Reviewers Group	False	Open	Rating Y Manager (RYM)	[Edit] [Delete]
Appraisal Cycle-2018-2019	Appraisal Cycle-2018-2019	01-Apr-2019 00:00	01-Nov-2021 23:59	Car Infotech Reviewers Group	False	Open	Annual Appraisal Workflow	[Edit] [Delete]

Figure 26 - Manage Feedback Cycle

- Select “ADD” option to add a new cycle.
- Provide the necessary cycle details as given below and proceed to the next step.
- Then add the employees who are covered for this cycle in the next step and confirm the process.

Cycle Details

Employee List

Schedule

Confirmation

Cycle Name :

Template :

Description :

1964 Characters Left

Cycle Date : To :

Review Group :

Review Period for Assessment :

Workflow :

Figure 27 - Add Feedback Cycle

10.2 Manage Continuous Feedback Categories.

- Continuous feedback is designed in such manner that the HR can decide what type of category has to be created and who can provide and access them in the system.
- Select Admin → HR Administration → Manage Continuous Feedback Categories.

Manage Continuous Feedback Category
 Home > Admin > HR Administration > Manage Continuous Feedback Category

Continuous Feedback Category List

+ ADD

Category	Visibility	Who can give	Activate/Deactivate	Action
Awards	<div>Public</div> <div>Public</div> <div>View by all</div> <div>Private</div> <div>Person who posts & self</div> <div>Confidential</div> <div>Person who posts</div> <div>Restrict To</div> <div>Relationships</div>	Who Can Give		<div>Save</div> <div>Delete</div>
Appreciation		None Selected	⊘	
Let's work on this		All selected	⊘	
Confidential Notes		None Selected	⊘	
Unique Contribution		All selected	⊘	

Showing 5 entries

First Previous 1 2 3 Next Last

Need Help?

Figure 28 - Manage Continuous Feedback Categories

- Add a new category → Mention the category Name → Select the visibility preference → Mention who all can give this category in continuous feedback → Save the category.

Few examples of the Continuous Feedback Categories are:

Category	Who Can Give	Visibility Settings	Purpose
Appreciation	Manager/Peer	The whole Organization can view (Configurable)	Spot encouragement & reinforce desired behavior
Areas of Improvement	Manager/Peer	Employee / his Manager / Skip Level Manager & HR (Configurable)	Document a potential development area & keep track of the coaching efforts
Ask a Question	Direct Reports	Manager / CO-Manager / Skip Level Manager & HR Manager (Configurable)	Provide guidance & Keep track of guiding efforts
Confidential Notes	Manager	Provider Only (Configurable)	Maintain meeting notes, Create an agenda for discussion with an employee etc.,
Unique Contribution	Manager, Department Head	Can be All or Restricted To Manager, Skip Level Manager, Department Head HR & Employee (Configurable)	To keep track of exceptional contribution

HR can easily create Continuous feedback categories as per the organization's existing culture.

10.3 Manage Feedback Form/Template

- Click Admin → HR Administration → Manage Feedback Form/Template
- HR team can manage multiple feedback forms for their employees by mapping their designation, level, track and organization unit.

Manage Templates Home > Admin > HR Administration > Manage Templates

Search Sort by Template Name

Accounts Analyst	Organization Unit : None Selected	Location : None Selected	Work Role : None Selected	Level : None Selected	Designation : Accounts Analyst	Track : None Selected
AP Executive Template	Organization Unit : None Selected	Location : None Selected	Work Role : None Selected	Level : None Selected	Designation : AP Executive	Track : None Selected
AR Executive Template	Organization Unit : None Selected	Location : None Selected	Work Role : None Selected	Level : None Selected	Designation : AR Executive	Track : None Selected
Asp1289	Organization Unit : None Selected	Location : None Selected	Work Role : (MultiSelected Items)	Level : (MultiSelected Items)	Designation : (MultiSelected Items)	Track : (MultiSelected Items)
Assistant Sales Manager Template	Organization Unit : None Selected	Location : None Selected	Work Role : None Selected	Level : None Selected	Designation : Assistant Sales Manager	Track : None Selected

Figure 29 - Manage Template

10.4 Manage Workflow

- Click Admin → HR Administration → Workflow
- HR can design multiple workflows and modify the same at any time before starting the performance evaluation cycle. It's very easy to create a workflow by drag and drop option.

Manage Workflow Design

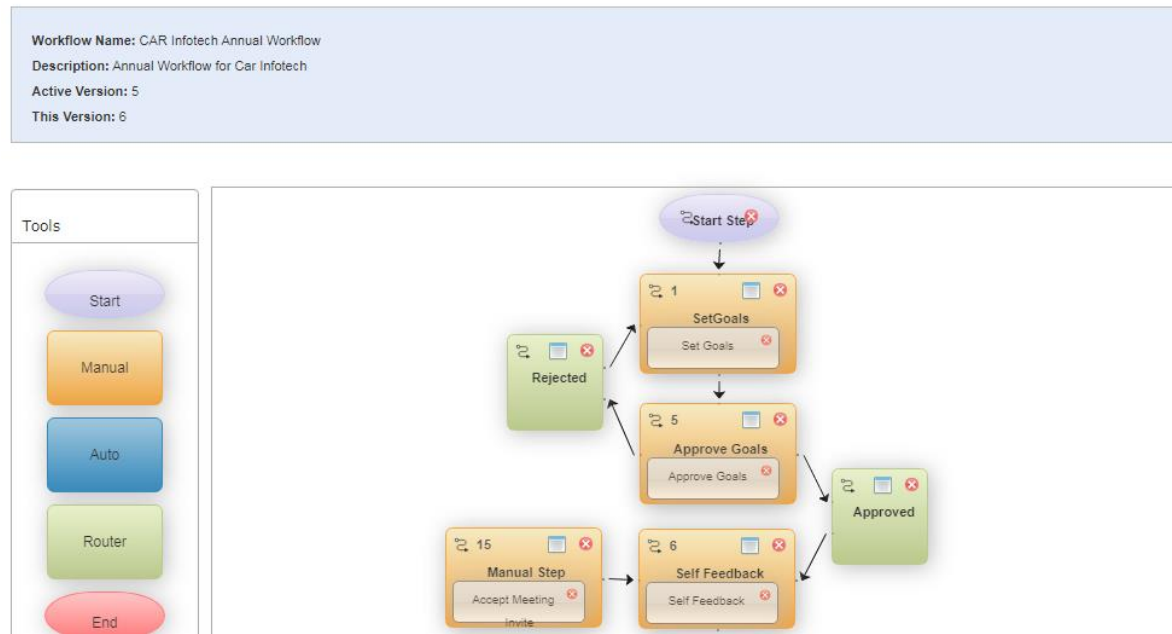


Figure 30 -Manage Workflow Design

10.5 Manage Email Notification

- Menu Click Admin → Tenant Administration → Manage Reminders
- Manage Email Notifications (Subject, body & recipient list; Activate/Deactivate email notifications)
- Managing reminder emails

Figure 31 - Manage Notification

HR admin can setup reminders/notifications to ensure all the activities are completed on time. The HR will be able to decide the interval of days the reminders should go and also modify the email template as per the organization needs.

10.6 Manage Grade Scale

- Click Admin → Tenant Administration → Manage Grade Scale
- HR can create the Rating scale (Fixed/Floating) with simple steps as shown in the below screenshot.

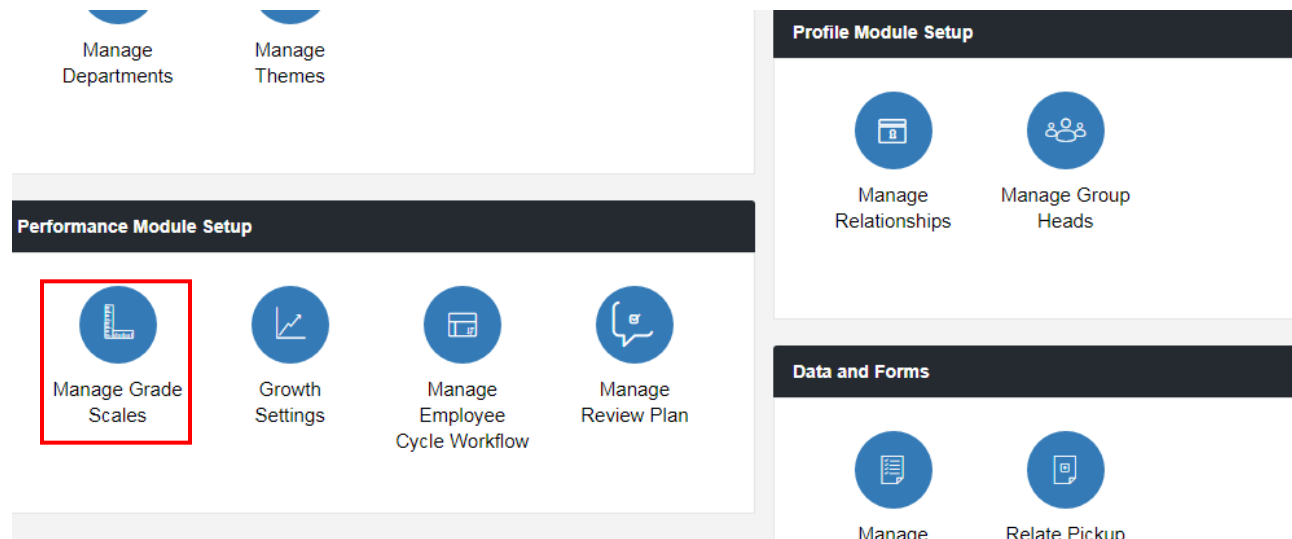


Figure 32 - Manage Grade Scale

11 Reports

- Click Reports → Manage Reports
- Analytical reports segregate into Employee Management Reports and Performance Management Reports. HR will have the access to get the statistical data about the Organization
- Reports can be exported. All the Reports have good set of filters to generate the reports as required by the HR.

List of Reports in Synergita

a. Employee Reports

- ✓ New Hire Report
- ✓ Employee Report
- ✓ Employee Personal Details Report
- ✓ Employee Passport Report
- ✓ Employee Education Report
- ✓ Attrition Report
- ✓ Employee Work Experience Details Report
- ✓ Employee Skill Set Report
- ✓ Employee Career Aspiration Report

b. Performance Reports

- ✓ Feedback Process Status Report
- ✓ Reviewer Feedback Report
- ✓ Recommendation Report
- ✓ Continuous Feedback Report
- ✓ Goal Status Report
- ✓ Perception Gap Analysis Report
- ✓ 9 box analysis Report
- ✓ Strength & Weakness Report
- ✓ Process Effectiveness Survey Report
- ✓ Team Score Analysis Report
- ✓ Meeting Summary Report
- ✓ PIP Details Report
- ✓ Performance Report

11.1 Employee Reports

- This report gives the information about the employees in the organization.
- These Reports are just dump reports that will give you the HRIS data.

Employee Report [Home](#) > [Manage Reports](#) > Employee Re

FILTER

Summary Report

Export

Search:

FIRST NAME*	EMPLOYEE NUMBER	EMAIL	DESIGNATION	DEPARTMENT	LOCATION
Ramesh	A001	vijay@car.com	Manager	Marketing	Bangalore
Varun	A002	varun@car.com	Engineer	Sales	Bangalore
Ali	A007	ali@car.com	Head of Sales	Sales	Bangalore
Asha	A008	asha@car.com	Engineer	Sales	Bangalore

Figure 33 - Sample Employee Report

11.2 Performance Report

- These are the analytical reports that provide Employees' performance related data.

11.2.1 Feedback Status Report

- This report helps the HR to know progress of the process during an appraisal

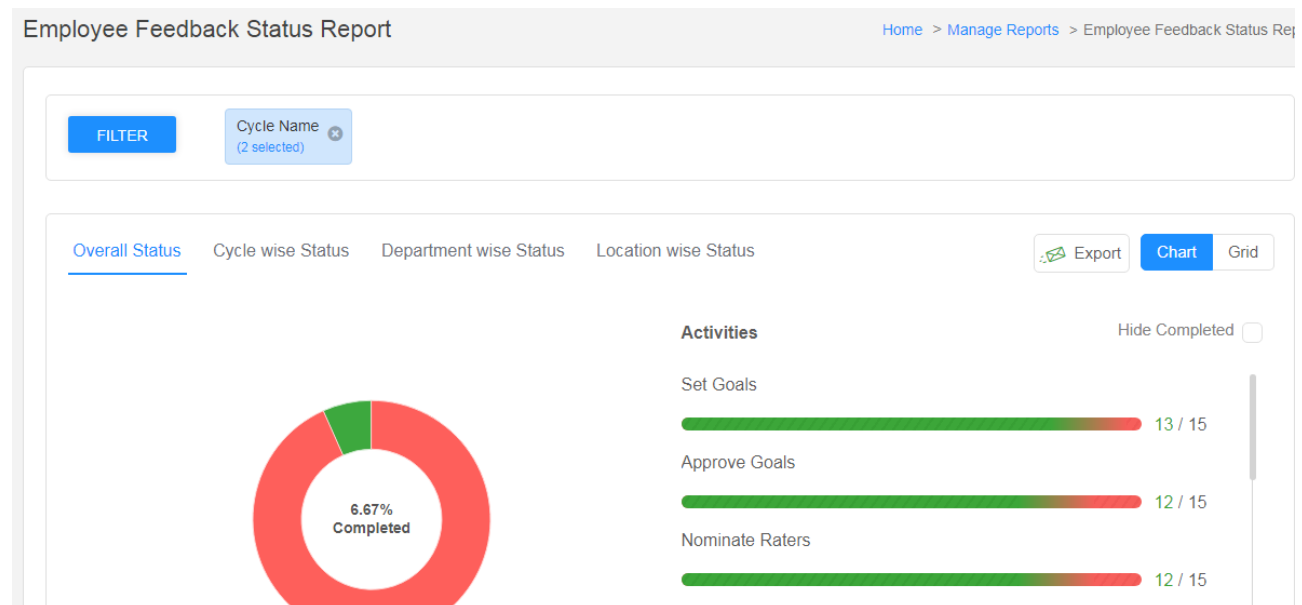


Figure 34 - Feedback Status Report

11.2.2 9 Box Analysis Report

- 9 Box Analysis report helps the HR to identify the Potential of an employee.
- Based on the overall rating, employees will be classified into different buckets. In this case the X axis will be Job Skills and Y axis will be Smart Goals.
- HR can easily identify the number of star performer, Achievers, good performer etc.as shown in the screenshot below.
- HR can configure the threshold values for each quadrant and also modify the label names for each quadrant.

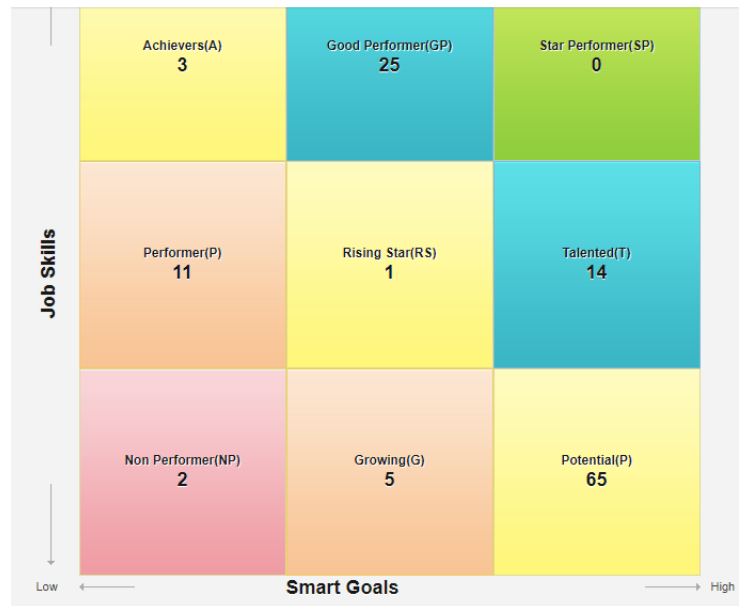


Figure 35 - 9 Box Analysis Report

Settings

X Axis Section: Job Skills
 Min: 0.01, Max: 0.44 (Low)
 X Axis Threshold: Min: 0.45, Max: 0.70 (Mid)
 Min: 0.71, Max: 4.0 (Top)

Y Axis Section: Smart Goals
 Min: 0.01, Max: 0.57 (Low)
 Y Axis Threshold: Min: 0.58, Max: 0.99 (Mid)
 Min: 1.0, Max: 2.5 (Top)

Quadrant Label:
 (1, 1) Non Performer (1, 2) Growing (1, 3) Unrealized P
 (2, 1) Performer (2, 2) Rising Star (2, 3) Talented
 (3, 1) Achiever (3, 2) Good Perform (3, 3) Star

Drill Down Grid Settings
 Available Column: Employee ID, Last Name, Photo
 Display Column: Email, Cycle Name, Primary Manager, Designation, DOJ, First Name

Save Cancel

Display Report

Easily accessible configuration setting for HR to set X & Y axis along with the bucket names.

Figure 36 - 9 box Analysis Settings

- By clicking on each box, the name of employees will be displayed and this helps them to track the data easily.

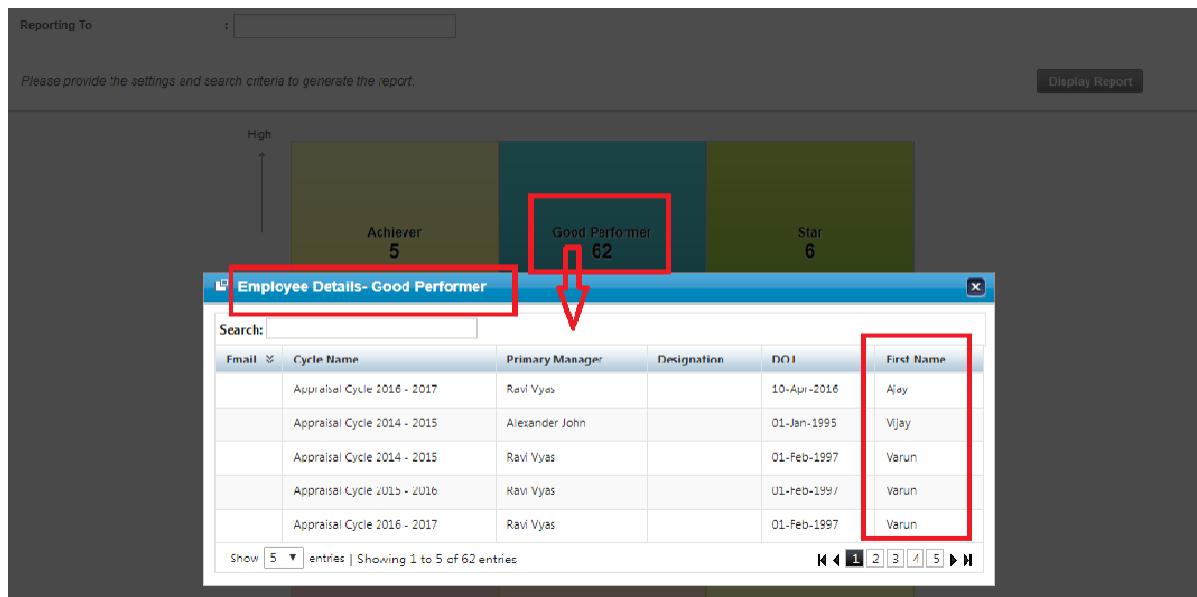


Figure 37 - 9 Box Analysis

11.2.3 Perception Gap Analysis

- The Report will help to understand the gap in the ratings between employee, manager and co-manager etc.
- HR can compare the overall scores from different reviewers.
- HR can do the detailed analysis of gap in ratings of each goal or competency.

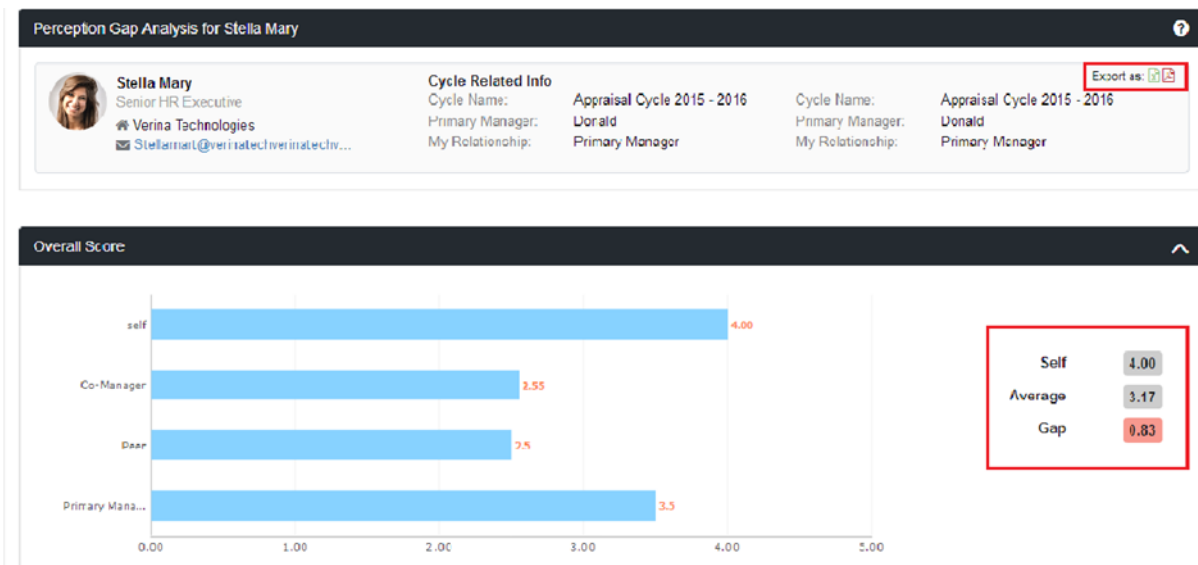


Figure 38 - Perception Gap Analysis (Overall Score gap analysis)

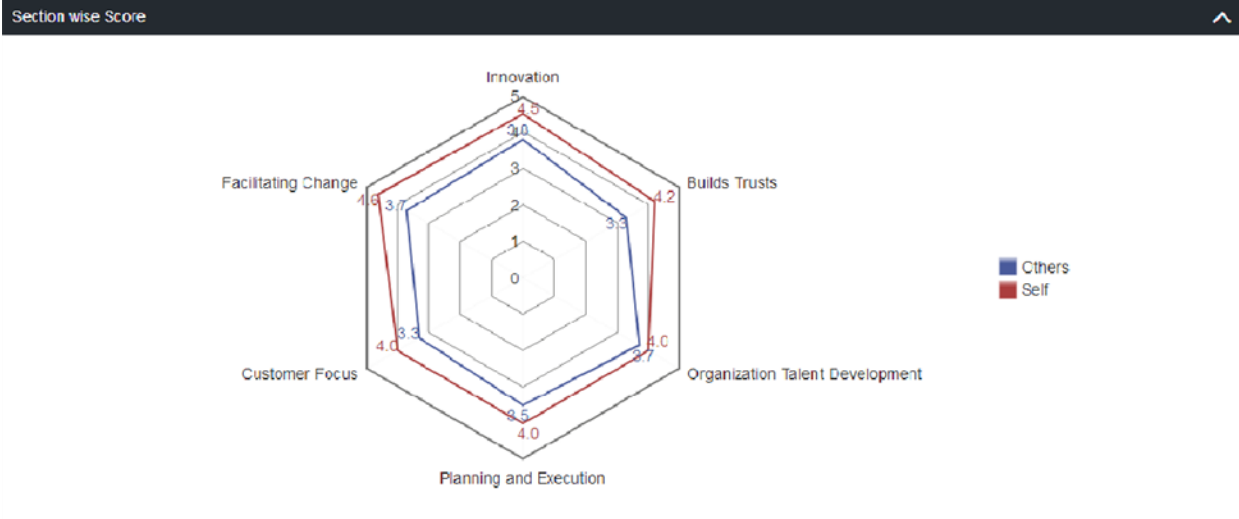


Figure 39 - Section Wise Score



Figure 40 - Goal Wise Score

11.2.4 Continuous Feedback Report

- An Extensive reporting on continuous feedback as shown below.

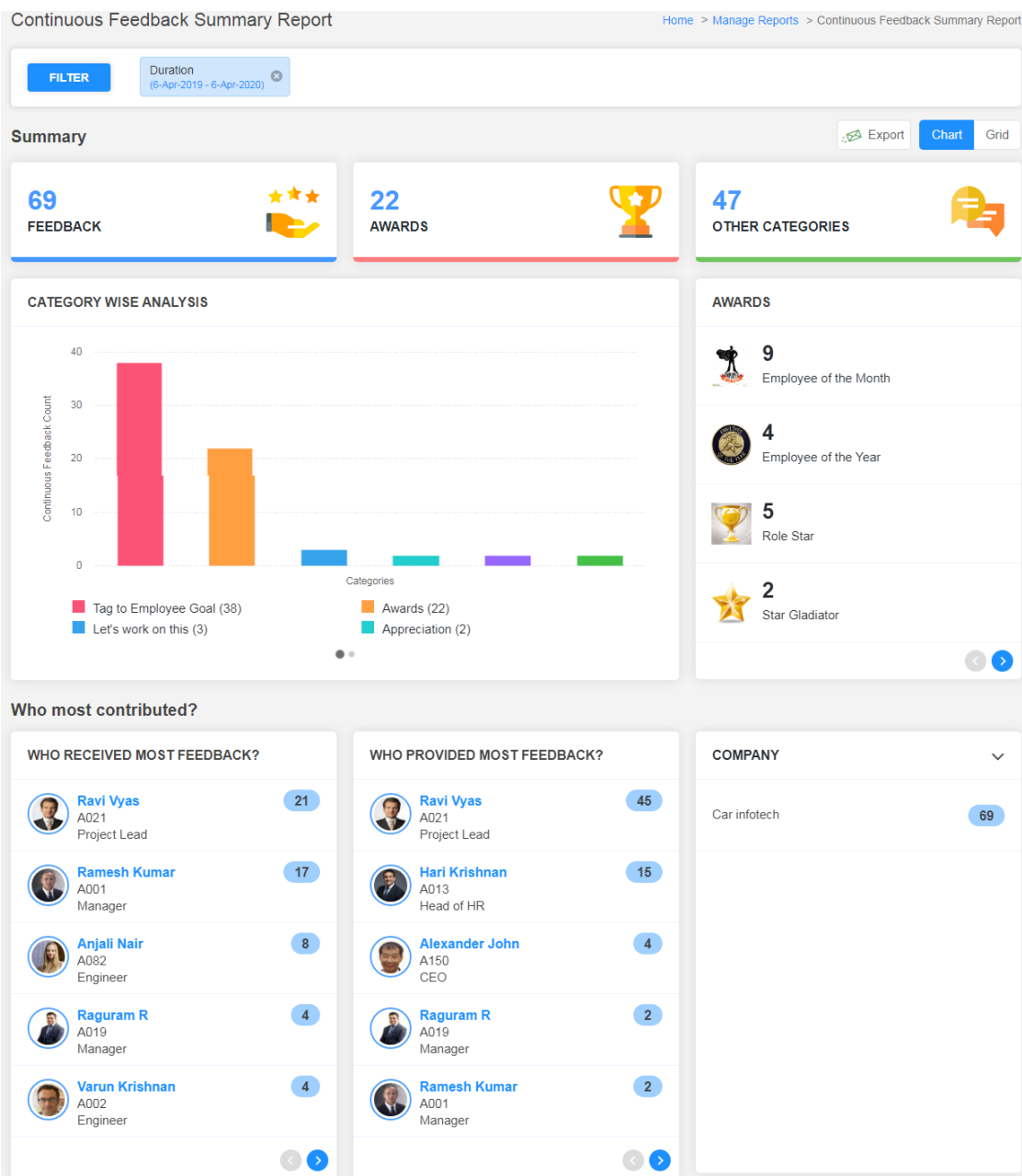


Figure 41 - Continuous Feedback Report

12 Conclusion

Thank you for walking through our software from Manager's and HR perspectives. We hope that you have got a better glimpse on the capabilities of the software.

Please reach out to us at support@synergita.com if you have any questions (or) reach out to sales@synergita.com to talk to our sales team.