

# **OPTIMA – Employee User Manual**

## **GSPC Group Company**

**PAGE NO: 22**

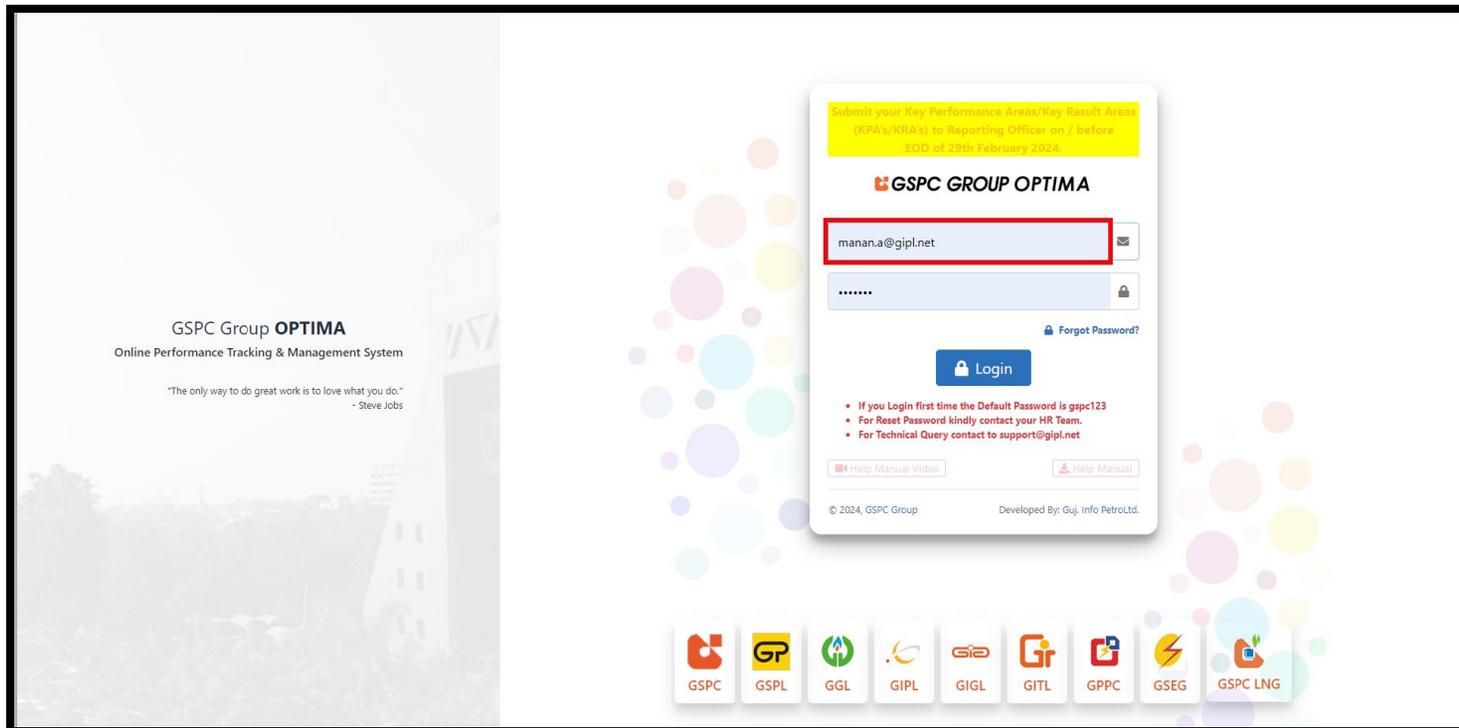
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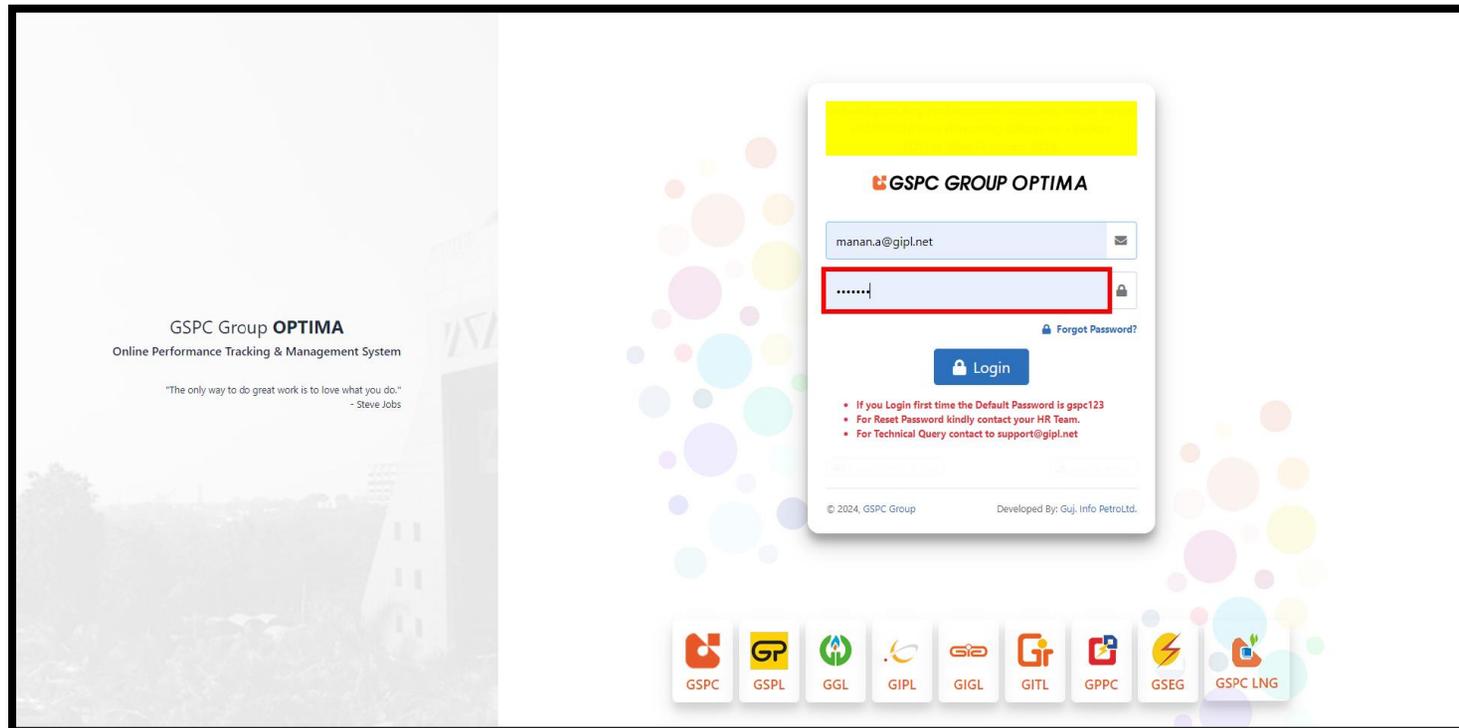
## OPTIMA – Employee User Manual

- Welcome to GSPC Group OPTIMA. First, the employee needs to log in and enter their username.



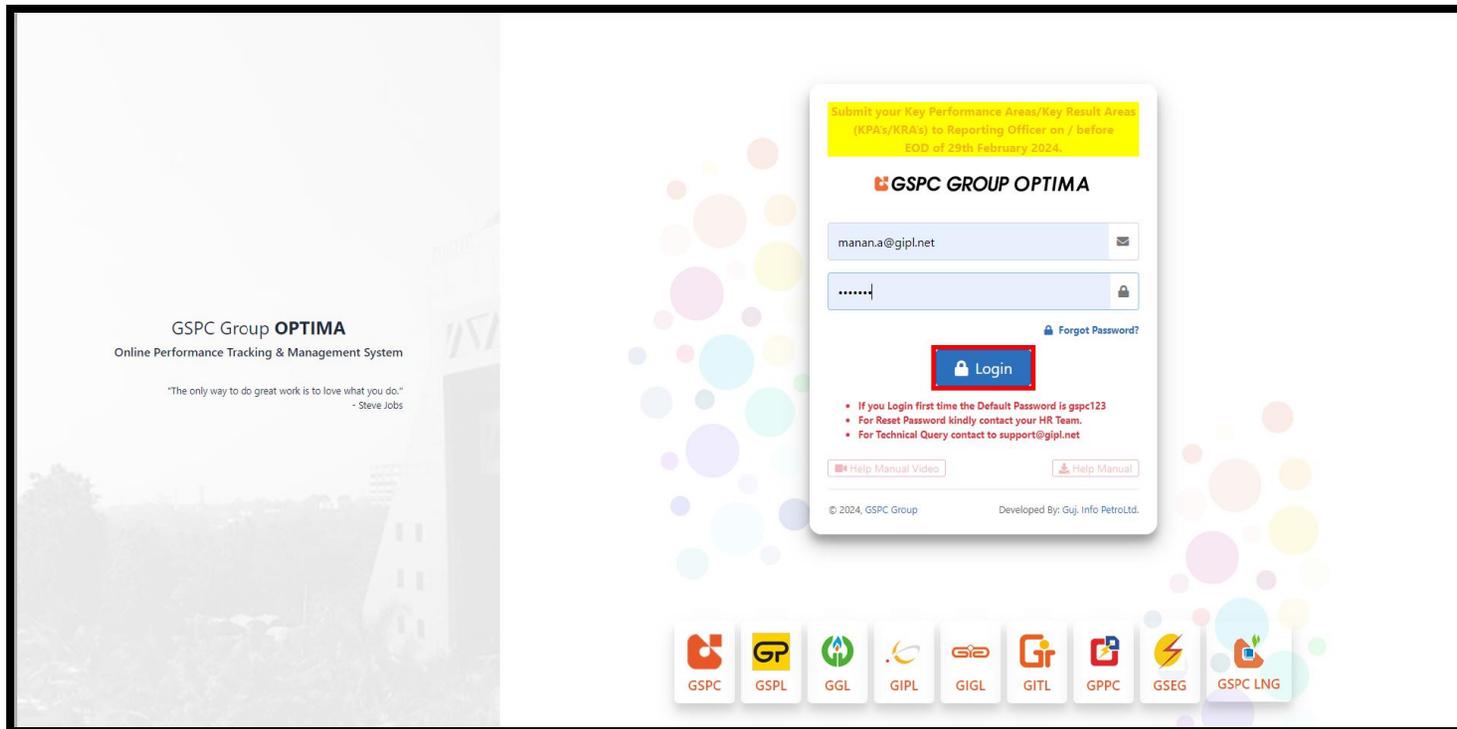
## OPTIMA – Employee User Manual

- And enter a password.



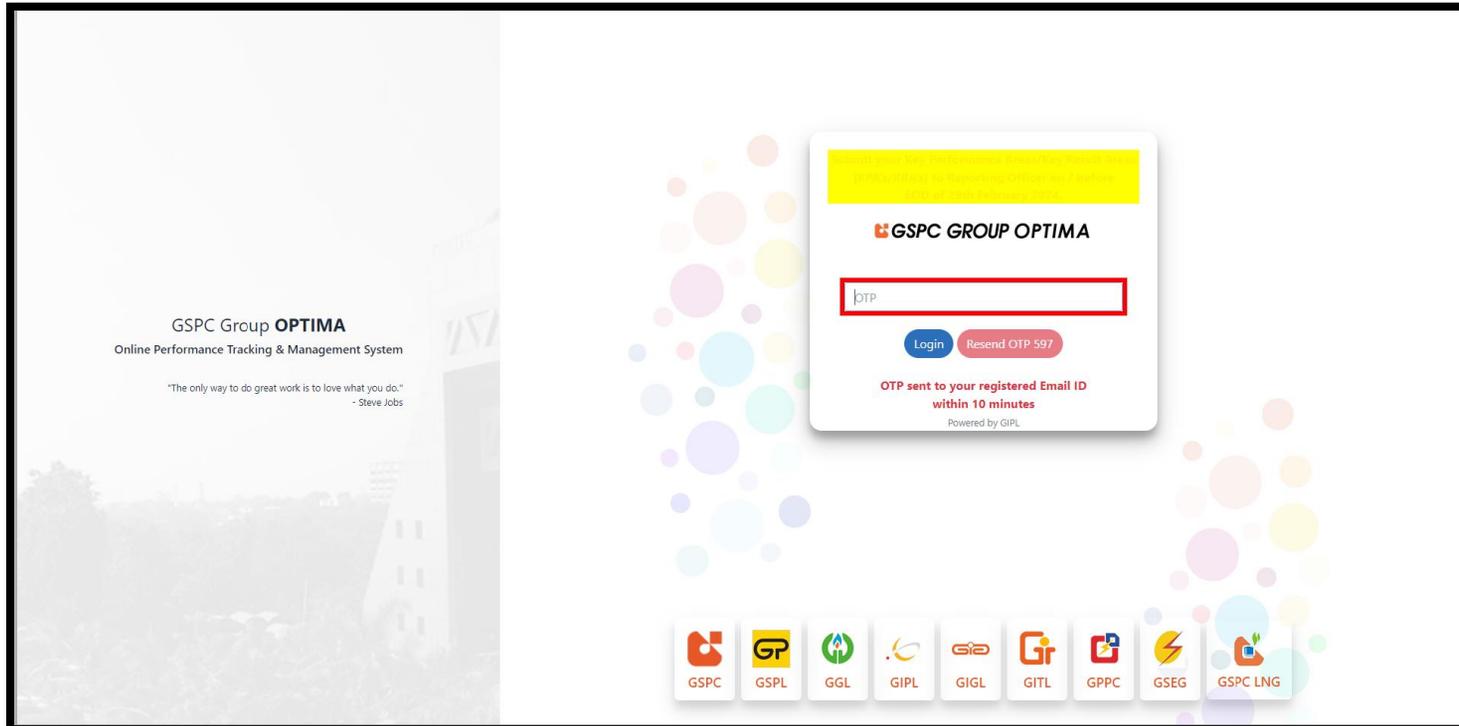
## OPTIMA – Employee User Manual

- Click on the Login Button.



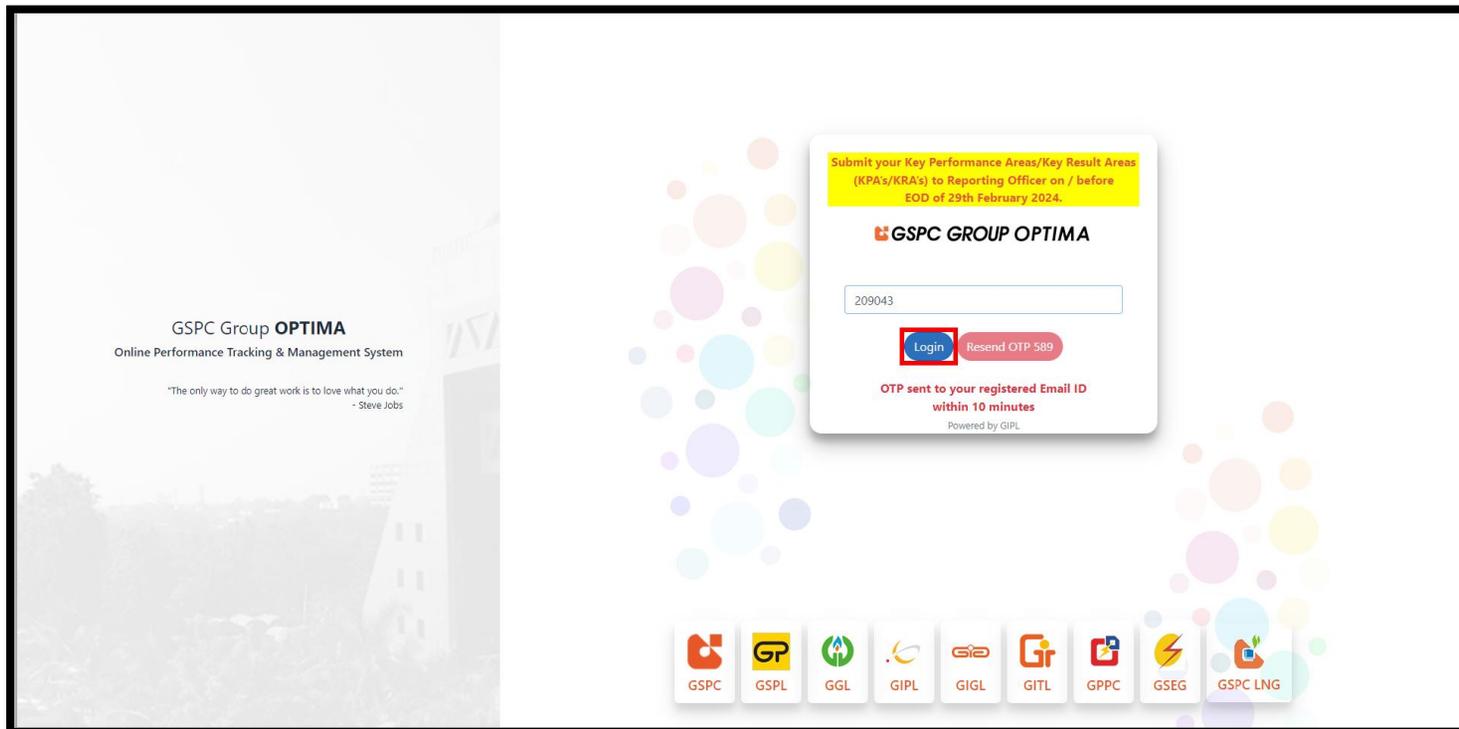
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- Then enter the OTP that is received on the registered email ID.



## OPTIMA – Employee User Manual

- And then Click on the Login Button.



## OPTIMA – Employee User Manual

- After Successfully login, employee can view the dashboard details. If an employee wants to fill out the Achievement form, they Should click on "Appraisal" to proceed further.

The screenshot displays the OPTIMA dashboard interface. The top navigation bar includes the logo 'GIPL KPA', the title 'Welcome to Online Performance Tracking and Management System (OPTIMA)', and a user profile icon. The left sidebar contains a menu with 'Appraisal' highlighted in a red box. The main content area shows a 'Details' section with a table of activity logs. The table has two columns: 'Event' and 'Time'. The footer contains 'Help Manual Video', 'Help Manual', 'Group. All rights reserved.', and 'Developed by GIPL'.

Event	Time
Appraisal Form is generated	GIPL HR on 20/06/2024 3:53:27 PM
Appraisal Form is released for setting KPAs	GIPL HR on 20/06/2024 3:53:56 PM
Appraiser has submitted the Appraisal Form	Manan Aghera on 20/06/2024 4:02:09 PM
Appraisal Form is forwarded to Reporting Officer	Manan Aghera on 20/06/2024 4:02:20 PM
Reporting Officer approves KPAs	Parth Barot on 20/06/2024 4:04:18 PM
Reporting Officer forwards the Appraisal Form OPTIMA administrator	Parth Barot on 20/06/2024 4:04:33 PM
Appraisal Form is released for assessment	GIPL HR on 20/06/2024 4:33:32 PM
Appraiser has submitted the Appraisal Form	
Appraisal Form is forwarded to Reporting Officer	
Reporting Officer forwards the Appraisal Form to the Reviewing Officer	
Reviewing Officer Approves the Appraisal form.The Reviewing Officer forwards the Appraisal Form OPTIMA administrator	

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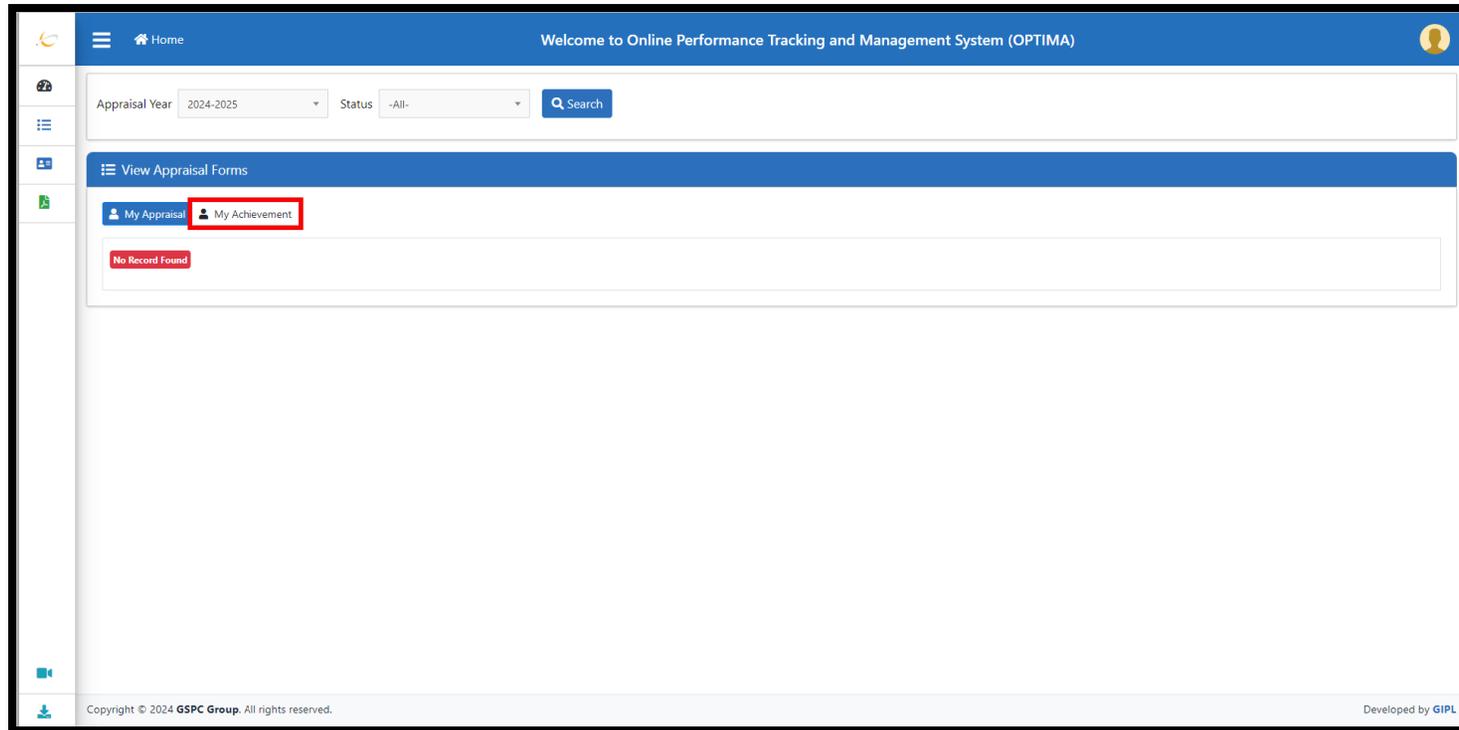
➤ Then click on "View Appraisal."

The screenshot displays the OPTIMA system interface. The top navigation bar includes the GIPL KPA logo, the text "Welcome to Online Performance Tracking and Management System (OPTIMA)", and a user profile icon. Below the navigation bar, there are dropdown menus for "2024-2025" and "Quarter Name Q1". The left sidebar menu is expanded, with "View Appraisal" highlighted in a red box. The main content area shows a "Details" section with a table of activity logs.

Activity	Timestamp
Appraisal Form is generated	GIPL HR on 20/06/2024 3:53:27 PM
Appraisal Form is released for setting KPAs	GIPL HR on 20/06/2024 3:53:56 PM
Appraiser has submitted the Appraisal Form	Manan Aghera on 20/06/2024 4:02:09 PM
Appraisal Form is forwarded to Reporting Officer	Manan Aghera on 20/06/2024 4:02:20 PM
Reporting Officer approves KPAs	Parth Barot on 20/06/2024 4:04:18 PM
Reporting Officer forwards the Appraisal Form OPTIMA administrator	Parth Barot on 20/06/2024 4:04:33 PM
Appraisal Form is released for assessment	GIPL HR on 20/06/2024 4:33:32 PM
Appraiser has submitted the Appraisal Form	
Appraisal Form is forwarded to Reporting Officer	
Reporting Officer forwards the Appraisal Form to the Reviewing Officer	
Reviewing Officer Approves the Appraisal form.The Reviewing Officer forwards the Appraisal Form OPTIMA administrator	

## OPTIMA – Employee User Manual

- Here, employees can view different tabs. Then click on "My Achievement" to proceed further.



## OPTIMA – Employee User Manual

- The employee views their details.

Welcome to Online Performance Tracking and Management System (OPTIMA)

Appraisal Year: 2024-2025 Status: -All- Search

View Appraisal Forms

My Appraisal My Achievement

Show 50 entries Search:

Sr No	Action	Appraisal Quarter Name	Employee				Reporting officer		Reviewing officer		Marks		Current Status
			Employee Code	Employee Name	Designation	Department	Company	Details	Details	Section A	Section B		
1	<a href="#">Fill Appraisal Form</a> <a href="#">View</a> <a href="#">View Status History</a>	Q1 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)- GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)- GIPL			Appraisal published	
2	<a href="#">View</a> <a href="#">View Status History</a>	Q2 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)- GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)- GIPL			KPA submitted to HR	
3	<a href="#">View</a> <a href="#">View Status History</a>	Q3 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)- GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)- GIPL			KPA submitted to HR	
4	<a href="#">View</a> <a href="#">View Status History</a>	Q4 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)- GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)- GIPL			KPA submitted to HR	

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- Now, to fill up achievement details, click on the "Fill Appraisal Form" button.

The screenshot displays the 'View Appraisal Forms' interface. At the top, there is a navigation bar with 'Home' and 'Welcome to Online Performance Tracking and Management System (OPTIMA)'. Below this, there are filters for 'Appraisal Year' (2024-2025) and 'Status' (-All-), along with a search button. The main content area shows a table of appraisal forms with columns for 'Sr No', 'Action', 'Appraisal Quarter Name', 'Employee Code', 'Employee Name', 'Designation', 'Department', 'Company', 'Reporting officer Details', 'Reviewing officer Details', 'Marks Section A', 'Marks Section B', and 'Current Status'. The 'Action' column for the first entry (Sr No 1) contains a 'Fill Appraisal Form' button, which is highlighted with a red box. Other buttons in the 'Action' column include 'View' and 'View Status History'. The 'Current Status' column shows 'Appraisal postponed' for the first entry and 'KPA submitted to HR' for the others. At the bottom, there is a footer with 'Copyright © 2024 GSPC Group. All rights reserved.' and 'Developed by GIPL'.

Sr No	Action	Appraisal Quarter Name	Employee				Reporting officer	Reviewing officer	Marks		Current Status	
			Employee Code	Employee Name	Designation	Department	Company	Details	Details	Section A		Section B
1	Fill Appraisal Form View View Status History	Q1 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			Appraisal postponed
2	View View Status History	Q2 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR
3	View View Status History	Q3 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR
4	View View Status History	Q4 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR

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- Then, employee needs to fill in the actual achievement details.

Welcome to Online Performance Tracking and Management System (OPTIMA)

Level	Section A KPA	Section B Leadership Competencies and Qualities
DGM & Above	50%	50%
AGM / SM / M / AM	80%	20%
SO & Below	90%	10%

- Section C deals with the Training needs.
- Section D deals with the Appraisal Summary and observations of the Reviewing Officer.
- Incentive will be decided on the basis of Company's Performance and Individual Performance.
- The rating are to be given by both the Reporting and Reviewing Officer & carry 50% weightage each.

**KPAs Q1**

Sr No	Key Performance Areas (KPAs)	Is Numeric?	Performance Indicators (Goals/ Targets/ Measures)	Actual Achievement (Reporting Officer in consultation with Appraisee)	Marks (Divide 50 marks among KPAs)
1	testentry 641 characters left.	<input checked="" type="checkbox"/>	3 649 characters left.	<input type="text"/> 650 characters left.	10.00
2	testentry 641 characters left.	<input type="checkbox"/>	testentry 641 characters left.	<input type="text"/> 650 characters left.	10.00

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- And provide all the details for each Key Performance Area.

Welcome to Online Performance Tracking and Management System (OPTIMA)

- Incentive will be decided on the basis of Company's Performance and Individual Performance.
- The rating are to be given by both the Reporting and Reviewing Officer & carry 50% weightage each.

KPAs Q1

Sr No	Key Performance Areas (KPA)	Is Numeric?	Performance Indicators (Goals/ Targets/ Measures)	Actual Achievement (Reporting Officer in consultation with Appraisee)	Marks (Divide 50 marks among KPAs)
1	testentry 641 characters left.	<input checked="" type="checkbox"/>	3 649 characters left.	10 648 characters left.	10.00
2	testentry 641 characters left.	<input type="checkbox"/>	testentry 641 characters left.	Test Entry 640 characters left.	10.00
3	testentry 641 characters left.	<input type="checkbox"/>	testentry 641 characters left.		10.00

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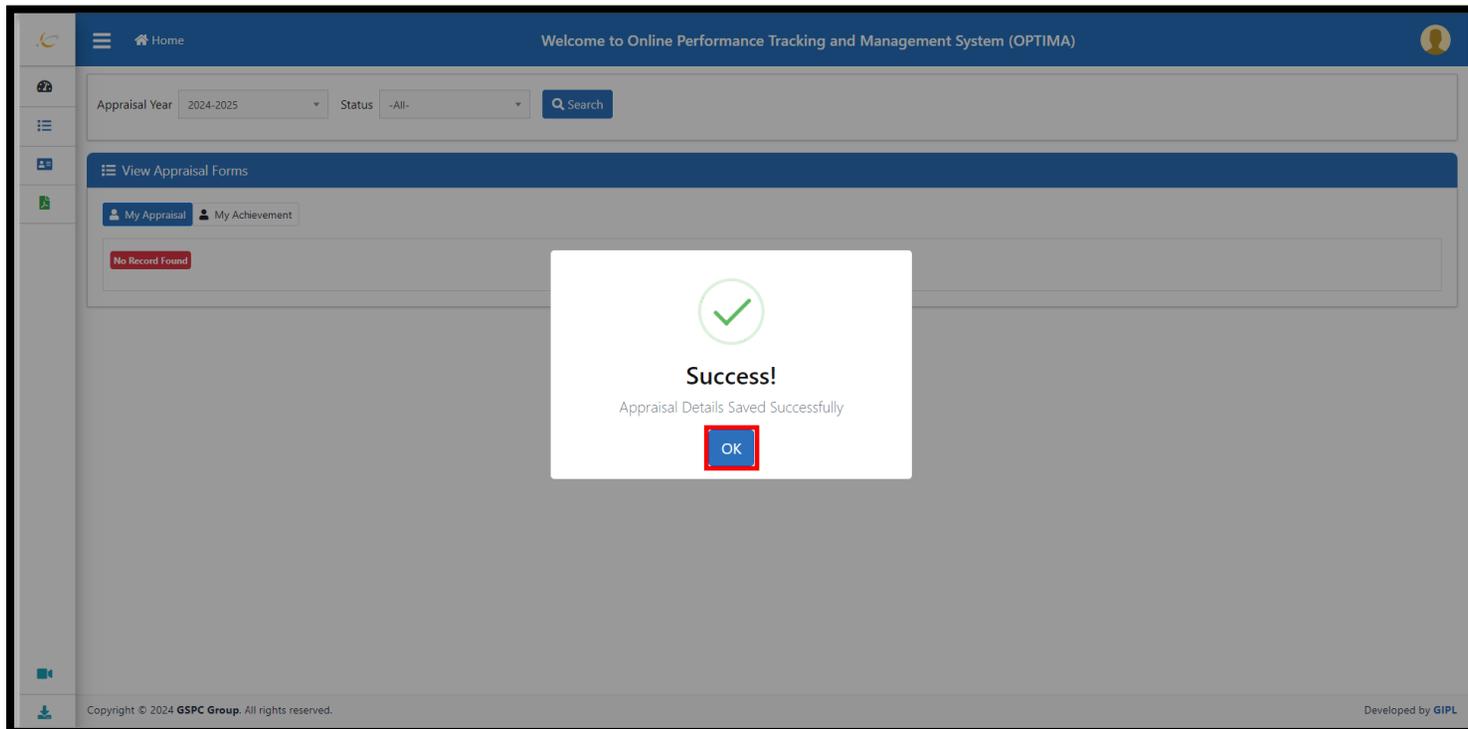
- After filling in the actual achievement details, click on the save button.

The screenshot displays the 'Welcome to Online Performance Tracking and Management System (OPTIMA)' interface. The main content area contains a table with two rows, numbered 4 and 5. Each row has three columns: a text input field containing 'testentry', a checkbox, and a 'Test Entry' field. The table also includes a 'Total' row at the bottom with a value of '50.00'. A 'Save' button is located at the bottom center of the form, highlighted with a red box. The footer of the page includes the copyright notice 'Copyright © 2024 GSPC Group. All rights reserved.' and the text 'Developed by GIPL'.

4	testentry	<input type="checkbox"/>	Test Entry	10.00
5	testentry	<input type="checkbox"/>	Test Entry	10.00
Total				50.00

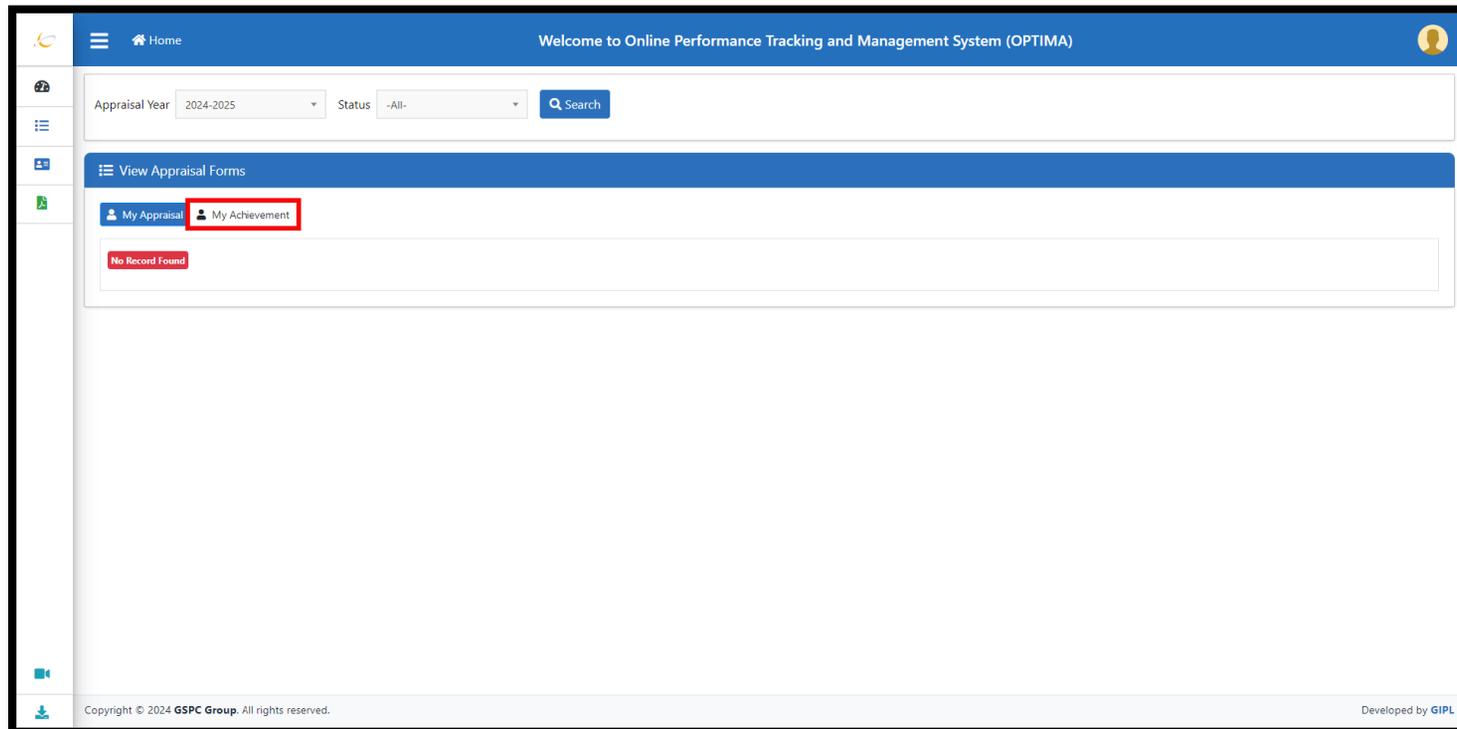
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- Then click on the OK button.



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- Now, for forwarding to the Reporting Officer, the Employee needs to click on the "My Achievement" tab.



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- Here, the Employee needs to click on the "Forward to Reporting Officer" button.

The screenshot displays the 'View Appraisal Forms' interface. At the top, there are filters for 'Appraisal Year' (2024-2025) and 'Status' (-All-), along with a search button. Below the filters, the 'View Appraisal Forms' section is active, showing a table of appraisal entries. The first row of the table has a red box around the 'Forward to Reporting Officer' button. The table columns include Sr No, Action, Appraisal Quarter Name, Employee Code, Employee Name, Designation, Department, Company, Reporting officer Details, Reviewing officer Details, Marks (Section A, Section B), and Current Status.

Sr No	Action	Appraisal Quarter Name	Employee Code	Employee Name	Designation	Department	Company	Reporting officer Details	Reviewing officer Details	Marks Section A	Marks Section B	Current Status
1	<a href="#">Fill Appraisal Form</a> <a href="#">Forward to Reporting Officer</a> <a href="#">View</a> <a href="#">View Status History</a>	Q1 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			Appraisal submitted
2	<a href="#">View</a> <a href="#">View Status History</a>	Q2 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR
3	<a href="#">View</a> <a href="#">View Status History</a>	Q3 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR
4	<a href="#">View</a> <a href="#">View Status History</a>	Q4 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR

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- Then provide remarks.

The screenshot displays the 'Appraisee Forward to Reporting Officer' dialog box. The dialog box has a blue header with the title and a close button. It contains the following fields:

- Appraisal Year:** 2024-2025
- Employee:** Manan Aghera
- Remarks:** A text input field, currently empty, highlighted with a red border.

At the bottom of the dialog box, there are two buttons: a green 'Submit' button and a red 'Close' button.

Below the dialog box, a table of appraisal records is visible. The table has the following columns: Sr No, Action, Appraisal Quarter Name, Employee Code, Employee Name, Designation, Department, Company, Reporting officer Details, Reviewing officer Details, Section A, Section B, and Current Status.

Sr No	Action	Appraisal Quarter Name	Employee Code	Employee Name	Designation	Department	Company	Reporting officer Details	Reviewing officer Details	Section A	Section B	Current Status
1	<a href="#">Fill Appraisal Form</a> <a href="#">Forward To Reporting Officer</a> <a href="#">View</a> <a href="#">View Status History</a>	Q1 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			Appraisal submitted
2	<a href="#">View</a> <a href="#">View Status History</a>	Q2 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR
3	<a href="#">View</a> <a href="#">View Status History</a>	Q3 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR
4	<a href="#">View</a> <a href="#">View Status History</a>	Q4 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR

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- And then clicks on the submit button.

The screenshot displays the 'View Appraisal Forms' interface. A modal dialog box titled 'Appraisee Forward to Reporting Officer' is open, showing the following details:

- Appraisal Year: 2024-2025
- Employee: Manan Aghera
- Remarks: Forwarded

At the bottom of the dialog are 'Submit' and 'Close' buttons. The background shows a table with appraisal records for Manan Aghera across four quarters (Q1-Q4) of 2024-2025. The table columns include Sr No, Action, Appraisal Quarter Name, Employee Code, Employee Name, Designation, Department, Company, Reporting officer Details, Reviewing officer Details, Section A, Section B, and Current Status.

Sr No	Action	Appraisal Quarter Name	Employee Code	Employee Name	Designation	Department	Company	Reporting officer Details	Reviewing officer Details	Section A	Section B	Current Status
1	<a href="#">Fill Appraisal Form</a> <a href="#">Forward To Reporting Officer</a> <a href="#">View</a>	Q1 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			Appraisal submitted
2	<a href="#">View</a> <a href="#">View Status History</a>	Q2 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR
3	<a href="#">View</a> <a href="#">View Status History</a>	Q3 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR
4	<a href="#">View</a> <a href="#">View Status History</a>	Q4 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR

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- After clicking on the submit button, a confirmation message displays. Then clicks on "Appraise Forward to Reporting Officer," and it will be forwarded to the Reporting Officer.

The screenshot displays the OPTIMA system interface. A modal dialog titled "Appraisee Forward to Reporting Officer" is open, showing the appraisal year (2024-2025), employee name (Manan Aghera), and remarks (Forwarded). Below the dialog, a confirmation message asks, "Are you sure you want to forward your Performance Appraisal Form for assessment for the Appraisal year 2024-2025 ?". The "Appraisee Forward to Reporting Officer" button is highlighted with a red box. The background shows a table of appraisal forms with columns for Sr No, Action, Appraisal Quarter Name, and Status.

Sr No	Action	Appraisal Quarter Name	Status
1	<a href="#">Fill Appraisal Form</a> <a href="#">Forward to Reporting Officer</a> <a href="#">View</a>	Q1 (2024-2025)	Appraisal submitted to HR
2	<a href="#">View</a> <a href="#">View Status History</a>	Q2 (2024-2025)	KPA submitted to HR
3	<a href="#">View</a> <a href="#">View Status History</a>	Q3 (2024-2025)	KPA submitted to HR
4	<a href="#">View</a> <a href="#">View Status History</a>	Q4 (2024-2025)	KPA submitted to HR

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- Then click on the OK Button.

The screenshot displays the OPTIMA web interface. At the top, a blue header contains the text "Welcome to Online Performance Tracking and Management System (OPTIMA)" and a user profile icon. Below the header, there are filters for "Appraisal Year" (set to 2024-2025) and "Status" (set to -All-), along with a search button. The main content area is titled "View Appraisal Forms" and includes tabs for "My Appraisal" and "My Achievement". A table lists appraisal entries with columns for "Sr No", "Action", "Appraisal Quarter Name", "Employee Code", and "Employee Name". A modal dialog box is centered on the screen, featuring a green checkmark icon and the text "Success! You have submitted the Performance Appraisal Form for the Appraisal year 2024-2025." Below the text is a blue "OK" button with a red border. The footer of the page contains the copyright notice "Copyright © 2024 GSPC Group. All rights reserved." and the text "Developed by GIPL".

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- Here, the employee's activity is complete. The employee can now successfully log out from the portal using the logout button.
- For further support and details, please send an email to Support@gipl.net. Thank you!

The screenshot displays the OPTIMA employee portal interface. At the top, there is a navigation bar with a home icon and the text "Welcome to Online Performance Tracking and Management System (OPTIMA)". Below this, there are filters for "Appraisal Year" (set to 2024-2025) and "Status" (set to -All-), along with a search button. A user profile dropdown is visible on the right, showing "Hi, Manan Aghera" and options for "Change Password" and "Logout" (highlighted in red).

The main content area is titled "View Appraisal Forms" and includes tabs for "My Appraisal" and "My Achievement". Below the tabs, there is a "Show 50 entries" dropdown and a search field. The central part of the page features a table with the following columns: Sr No, Action, Appraisal Quarter Name, Employee Code, Employee Name, Designation, Department, Company, Reporting officer (Details), Reviewing officer (Details), Marks (Section A, Section B), and Current Status.

Sr No	Action	Appraisal Quarter Name	Employee Code	Employee Name	Designation	Department	Company	Reporting officer Details	Reviewing officer Details	Marks Section A	Marks Section B	Current Status
1	<a href="#">View</a> <a href="#">View Status History</a>	Q1 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			Appraisal sent to Report.
2	<a href="#">View</a> <a href="#">View Status History</a>	Q2 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR
3	<a href="#">View</a> <a href="#">View Status History</a>	Q3 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR
4	<a href="#">View</a> <a href="#">View Status History</a>	Q4 (2024-2025)	000091	Manan Aghera	MGR	SD	GIPL	Parth Barot - Business Analyst (SD)-GIPL	Lalit Chaudhary - Sr. Software Engineer (SD)-GIPL			KPA submitted to HR

At the bottom of the table, it says "Showing 1 to 4 of 4 entries" and includes "Previous" and "Next" navigation buttons.

The footer contains the text "Copyright © 2024 GSPC Group. All rights reserved." and "Developed by GIPL".