## CONTENTS

<table>
<thead>
<tr>
<th>S. No.</th>
<th>Particulars</th>
<th>Page No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Navigating through the Online BSC module</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>Individualization of STANDARD/ CUSTOMIZED BSC</td>
<td>3</td>
</tr>
<tr>
<td>3</td>
<td>Addition of New Performance Measures</td>
<td>8</td>
</tr>
<tr>
<td>4</td>
<td>Updation of Targets for CUSTOMIZED BSC</td>
<td>10</td>
</tr>
<tr>
<td>5</td>
<td>Creation/Modification of UNIQUE BSC</td>
<td>11</td>
</tr>
<tr>
<td>6</td>
<td>Initiative</td>
<td>18</td>
</tr>
<tr>
<td>7</td>
<td>BSC approval Flow</td>
<td>19</td>
</tr>
</tbody>
</table>
## NAVIGATION

<table>
<thead>
<tr>
<th>S.N</th>
<th>Particulars</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Link to find BSC category</td>
<td><strong>iNIITian → Human Resources → Performance Management → Balanced Score Card → Self → My BSC Category</strong></td>
</tr>
<tr>
<td>2</td>
<td>Link for Individualization</td>
<td><strong>iNIITian → Human Resources → Performance Management → Balanced Score Card → Self → BSC Pending for Action</strong></td>
</tr>
<tr>
<td>3</td>
<td>Link for Addition of New Performance Measure</td>
<td><strong>On BSC Creation page itself or iNIITian → Human Resources → Performance Management → Balanced Score Card → Self → Performance Measure Request</strong></td>
</tr>
<tr>
<td>4</td>
<td>Link to create UNIQUE BSC</td>
<td><strong>iNIITian → Human Resources → Performance Management → Balanced Score Card → Self → Create BSC</strong></td>
</tr>
<tr>
<td>5</td>
<td>Link for Supervisor to View &amp; Approve BSC</td>
<td><strong>iNIITian → Human Resources → Performance Management → Balanced Score Card → As Supervisor → BSC Pending for Action as Approving Manager</strong></td>
</tr>
</tbody>
</table>
**INDIVIDUALIZATION of STANDARD & CUSTOMIZED BSCs**

Individualization is a process through which you will be able to add Performance Measures if you are handling responsibilities other than the defined role. You will be able to add Performance Measures under various KPAs other than the Financial KPA. You will be able to add Performance Measures for a minimum of 5% and a maximum of 20% weightage. This could be in the form of one Performance Measure of multiple Performance Measures. When you add Performance Measures, the weightages already assigned to the Performance Measures under KPAs other than the Financial KPA will get reset proportionately automatically. The additional Performance Measures cannot have VC or SI weightage. None of the existing Performance Measures can be modified or deleted.

**Path for Individualization:** 
iNITian → Human Resources → Performance Management → Balanced Score Card → Self → BSC Pending for Action.

On selecting this option below screen will appear.

![Balanced Score Card](image)

On this menu, click on the NIITian Code and the following menu will appear.
From the above menu please click on “Add Measure” option.

No additional Performance Measure can be added under the Finance KPA.

After selecting the “Add Measure” option below screen will appear.
On typing the performance measure in “Select Performance Measure” box list of relevant parameters containing typed keywords will appear from which the desired parameter can be selected to add in the BSC.

On selecting applicable Performance Measure, the attributes “Calculation Method”, “Unit of Measurement”, “Parameter Type” and “Achievement Flag” will automatically get populated from the Performance Measure Master.

The “Data Source” and “Periodicity” needs to be updated from the drop down master. Quarterly/Biannual target” and “Performance weightage” as applicable needs to be entered by the NIITian. Click on the “UPDATE” option to get the Performance Measure added.
For addition of more Performance Measures, repeat the above process.

After addition of performance measures, click on “Send for Approval” option to submit the BSC for approval to the Approving Manager.
On submission of BSC for approval, the Approving manager will have the option to either “Freeze” the BSC or “Send Back” the BSC to the NIITian with remarks for the required modification.

NIITian needs to modify the BSC according to the remarks. Following are the possibilities.

1. Deletion of the additional parameter. The option to “delete” the performance measure is available on the last column, after the BSC is opened. On clicking the “delete” button, the performance measure will get deleted from the BSC. Weightages will get back to normal if Individualized Parameters get deleted.
2. Modify other attributes of the performance measure added i.e. target, performance weightage, periodicity and data source.
3. Addition of new performance measure. If the performance measure to be added already exists in the measure master, the same has to be selected and added to the BSC. If the performance measure doesn’t exist, please follow the process explained on page No. 7.
4. For customized BSC, modification of customized targets as approved by the Approving Manager.

On making the above changes as applicable, the BSC has to be submitted to the Approving Manager.
ADDITION OF NEW PERFORMANCE MEASURES

In case the Performance Measure that has to be added does not exist in the Measure Master, online request for new Performance Measure creation has to be sent through the “New Performance Measure Request” link available on BSC Creation page itself on the top right side.

On clicking the “Performance Measure Request” below screen will appear.

Select the applicable Category (Financial, Customer, Internal Process, Learning and Growth) and add “Measure Description”, “Calculation Method”, “Unit of Measurement” and “Define Achievement for calculation”. All these attributes are mandatory except remarks.
After all these attributes are filled in, click on “Submit” to send the request. Performance Measure Request will directly go to Shared Services and it will be added in 1 working day. NIITian will receive an email confirmation after which the Performance Measure is added to the measure master. New measure then can be added to the BSC.
UPDATION OF TARGETS FOR CUSTOMIZED BSCs

This process is applicable to NIITians covered under CUSTOMIZED BSC only. NIITians covered under the CUSTOMIZED BSCs are required to update Targets against various Performance Measures. NIITians covered under Sales Incentive (SI) policy are required to update Quarterly Targets and Quarterly Threshold Targets for all four Quarters of 2018-19 against the SI Performance Measures. Threshold Target is not applicable to Non SI & Non VC Parameters.

Open the BSC for 2018-19 and clicks on the performance Measure, the below screen will appear.

Approved targets needs to be updated accordingly. Wherever SI is applicable Quarterly Targets/ Quarterly Threshold Targets need to be updated. After which the BSC need to be submitted to your Supervisor for approval.
CREATION/ MODIFICATION of UNIQUE BSCs

This process is applicable to NIITians covered under UNIQUE BSCs only. NIITians covered under the UNIQUE BSC are required to create their BSC using the online BSC module. NIITians will have the option to “Create BSC”, using the blank BSC template or modifying the BSC for 2017-18, if applicable. NIITians using the 2017-18 BSC, have to update the “Annual Target” and “Performance Weightage” against each Performance Measure under each KPA.

NIITian covered under Sales Incentive:

NIITians need to identify the SI Performance Measures based on the discussion with the supervisor and update the weightage and threshold targets against the Performance Measure. NIITians need to update the Threshold Targets against SI Performance Measure.

Wherever SI is applicable Quarterly Targets/ Quarterly Threshold Targets mandatorily needs to be updated

Path to create UNIQUE BSC: iNIITian ➔ Human Resources ➔ Performance Management ➔ Balanced Score Card ➔ Self ➔ Create BSC.

After going through the BSC FY-18 Guidelines click on the “Continue” button the below screen will appear and the existing NIITian will have the option to “Create Blank BSC” or “Copy and Create from last year's BSC” (if applicable). For just viewing the BSC of 2018-19 click on “View Last Year's BSC” (if applicable) option.

New Joiner either can “Create Blank BSC” or can view and copy BSC (If applicable) from the other Team Member in the same role.
After clicking on "Create Blank BSC" the below screen will appear. Using the blank template, NIITians can create the online BSC. To start creating the BSCs, NIITians need to click on “Add Measure” under each KPA to keep adding the performance measures.

After clicking on “Add Measure” Below screen will appear.
On typing the performance measure in “Select Performance Measure” box list of relevant parameters containing typed keywords will appear from which the desired parameter can be selected to add in the BSC.

On selecting applicable Performance Measure, the attributes “Calculation Method”, “Unit of Measurement”, “Parameter Type” and “Achievement Flag” will automatically get populated from the Performance Measure Master.
The “Data Source” and “Periodicity” needs to be updated from the drop down master. “Quarterly/Biannual target” and “Performance weightage” as applicable needs to be entered by the NIITian. For SI Performance Measures it is mandatory to update Quarterly Targets and Threshold Targets.

Periodicity as per KPA:

<table>
<thead>
<tr>
<th>KPA</th>
<th>Plan R&amp;S</th>
<th>Plan P&amp;Q</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial (All parameters except where UoM is date)</td>
<td>Quarterly</td>
<td>Half Yearly/Quarterly</td>
</tr>
<tr>
<td>Customer (Customer acquisition parameters where UoM is Ratio, Nos., %age or has currency values like INR K, USD K etc..)</td>
<td>Quarterly</td>
<td>Half Yearly/Quarterly</td>
</tr>
</tbody>
</table>

**Periodicity Biannual to be selected**
- If target is in either H1 or H2 eg ESS :: Select annual target is Different from biannual targets.
- If target is in both H1 and H2 and annual target is sum of H1 & H2 eg revenue :: Select annual target is Addition of biannual targets.
- If target is in both H1 and H2 and annual target is same as H1 & H2 targets eg zero defects :: Select annual target is Same as biannual targets.

**Periodicity Quarterly to be selected**
- If target is in either quarter (Q1, Q2, Q3 or Q4) eg CSS :: Select annual target is Different from quarterly targets.
- If target is in all quarters and annual target is sum of all quarterly targets eg collection :: Select annual target is Addition of quarterly targets.

If target is in all quarters and annual target is same as all quarterly targets eg Zero escalation :: Select annual target is Same as quarterly targets.
Click on the “ADD” option to get the Performance Measure added.
To add more Performance Measures in the BSC, the above defined process needs to be repeated. After adding the Performance Measures, click on “Send for Approval” option to submit the BSC for approval to the immediate supervisor.

To modify the previous BSC to create the BSC for 2018-19, click on the “Copy and Create from Last Year’s BSC” link and previous year BSC will be available for modification. You can “Modify” the targets by clicking on the existing Performance Measure and /or click on “Add Measure” to add new Performance Measures. For addition of Performance Measures which do not appear in the Performance Measure master, please follow the process as explained above (Page No. 7) for the Addition of Performance Measure.

On selecting the Performance Measure from the Performance Measure master, the below screen will appear.
On this screen the “Data source” and “Periodicity” need to be selected from the drop down master and “Quarterly/Biannual Target” and “Performance Weightage” need to be updated.

To add more Performance Measures, the above defined process need to be repeated. After adding the Performance Measures click on “Send for Approval” option to submit the BSC for approval to the supervisor.
**Initiative**

To add an initiative click on add parameter under KPA Initiative and search for the parameter in search option. In case the required parameter is not available under the KPA Initiative, follow the same steps as illustrated in “Addition of New Performance Measures on page#7”.

Select Data Source, Periodicity, targets and attach a project plan & click on “Update” to add the measure.

*Please note that the project plan is mandatory to attach.*

**Sample project plan:**

<table>
<thead>
<tr>
<th>S.No</th>
<th>Project Steps</th>
<th>Wtg</th>
<th>Who</th>
<th>Start Date</th>
<th>End Date</th>
<th>Completion Status</th>
<th>%age Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Market scanning and recommendations</td>
<td>50%</td>
<td></td>
<td>1-Oct-18</td>
<td>15-Oct-18</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1</td>
<td>Study sample cards of various companies</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Recommendations by BIZ HR &amp; PEM</td>
<td>50%</td>
<td></td>
<td>16-Oct-18</td>
<td>15-Nov-18</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.1</td>
<td>Round 1 discussion</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.2</td>
<td>Round 2 discussion</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.3</td>
<td>Finalize the contents and design of the card</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.4</td>
<td>Sign Off</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Implementation</td>
<td>20%</td>
<td></td>
<td>16-Nov-18</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.1</td>
<td>Coordinate with CSO for printing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
BSC APPROVAL FLOW

STANDARD

NIITian submits the BSC, after Individualization if applicable, to the immediate supervisor. On immediate supervisor approving, the BSC gets frozen. The “individualization” if applicable needs to be done within 5 working days from the date of receipt of your online BSC. If not done the BSC will get auto forwarded to the immediate supervisor. Supervisor will have 3 working days from the date of receipt of your online BSC. If not done within these 3 working days, the BSC will get auto frozen. If the 1st Level modify the BSC then history will be maintained and NIITian will get an auto trigger communicating the changes and that he can view the BSC with changes. BSC will remain in not frozen state for 72 Hrs for any subsequent modification after which it gets auto-frozen.

CUSTOMIZED

NIITian does the Individualization if applicable and updates the targets and submits the BSC to the immediate supervisor. On immediate supervisor approving, the BSC gets frozen. The “individualization” if applicable needs to be done within 5 working days from the date of receipt of your online BSC, If not done this option will be disabled. Once the BSC is submitted to the supervisor, the supervisor will have 3 working days from the date of receipt of your online BSC. If not done within these 3 working days, the BSC will get auto frozen. If the 1st Level modify the BSC then history will be maintained and NIITian will get an auto trigger communicating the changes and that he can view the BSC with changes. BSC will remain in not frozen state for 72 Hrs for any subsequent modification after which it gets auto-frozen.
UNIQUE BSC APPROVAL FLOW

NIITian creates & submit the BSC to 1st Level Supv.

1st Level Supv. has the option to send back, modify or submit the BSC

PEM Validates and freezes the BSC

BSC submitted to the PEM for validation if NIITian is at Level up to R4

BSC submitted to the Biz HR for validation if NIITian is at the Level of R5 and Plan S

Is the 1st Level is at S6 or above?

Yes

PEM/Biz HR Validates and freezes the BSC

BSC submitted to the PEM/Biz HR for validation & PEM/Biz HR submits to 2nd Level Supv.

Is the 2nd Level is at R4 or below?

Yes

R5 Level supv. freezes the BSC

BSC submitted to the next Level till it reaches an R5 supv. in the hierarchy

No

2nd Level Supv. Freezes the BSC

BSC sent back for modification