

E-APER STEP-BY-STEP USER GUIDE

Version: 1.0

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Purpose: Practical step-by-step instructions for each role using the E-APER system (Staff, HOD/Supervisor, Director/Dean, Establishment Representative).

Quick Start Checklist

- Ensure you have a valid user account and role assigned (Staff, Supervisor/HOD, Dean/Director, Establishment Rep).
 - Recommended browser: Latest Chrome, Edge, or Firefox.
 - Attachments (e.g., CV(PDF), Digital Signature) should be accessible and less than 2MB each.
 - Have exact dates ready for any acting appointments or short-term duties.
 - Know your submission deadline.
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Common UI Elements (what you will see)

- **Dashboard:** Lists pending actions, deadlines and recent messages.
 - **My APER / Pending Reviews:** Where staff create and supervisors review reports.
 - **Save Draft / Submit / Return:** Buttons to save progress, submit, or return for corrections.
 - **Comment box:** For narrative feedback or clarifications.
 - **Attachments:** Upload supporting documents.
 - **Export/Print:** Generate PDF or Excel of the completed APER.
 - **Audit trail / History:** Timestamped log of submissions, approvals and comments.
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Role: Staff (Self-Appraisal)

Purpose for staff

Provide accurate self-assessment for the reporting period, attach supporting evidence and submit for supervisor review.

Step-by-Step

- **Log in** with your credentials **PF_NO** and Surname as Default Password.
- Will be redirected to **change password** for first attempt.
- **Complete personal details:** confirm name, DOB, staff ID, unit/department, grade and designation, Appointment Date, Qualifications, DOI link (**Academic Staff**) **only** for publications, upload signature and CV.
- Click on **Form Application** and Click on **Apply** to fill the below requirements.
- **Acting appointments (if any):** enter role and exact dates (format: DD MMM YYYY – DD MMM YYYY).

- **Main duties (order of importance):** list 3–6 duties in priority order.
 - **Achievements & outputs:** list measurable outputs (e.g., courses delivered, papers published, projects completed). Use bullet points and dates.
 - **Difficulties encountered & efforts to rectify:** short paragraph per difficulty + corrective action.
 - **Training needs:** indicate types of training required with justification.
 - **Ad-hoc duties:** list any extra tasks performed and dates.
 - **Comments / Supervisor communication:** add any clarifications you want your supervisor to know.
 - **Submit:** when complete, click **Submit to Supervisor**.
 - **Confirmation:** you will receive an on-screen confirmation. A timestamped record appears in your **Application History** which can be found at the **Form application**.
 - **Responding to returns:** if the supervisor returns the APER for comments, you'll get a notification — open the returned report, make comments, then resubmit.
 - **Finalization:** once the Establishment rep signs off, download or print a copy for your records.
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ROLE: HOD / SUPERVISOR

Purpose for HOD/Supervisor

Review staff self-appraisals, provide constructive feedback, score where applicable, and forward endorsed reports up the chain.

Step-by-Step

1. **Log in** with your credentials **PF_NO** and Surname as Default Password.
2. Will be redirected to **change password** for first attempt.
3. **Complete personal details:** confirm name, DOB, staff ID, unit/department, grade and designation, Appointment Date, Qualifications, DOI link (**Academic Staff**) **only** for publications, upload signature and CV.
4. **Open staff APER:** review the staff's entries, by clicking on Form Application, then click on application history to view staff that has applied under you as a head.
5. **Check completeness:** ensure required fields are filled, attachments present for key claims.
6. **Evaluate duties & achievements:** verify that outputs match attached evidence or known records.
7. **Score / Rate** where applicable using the scoring rubric (enter numeric or categorical ratings in the scoring fields).
8. **Add comments:** provide constructive feedback, recommendations, and suggested development steps.
9. **Approve & Forward:** when satisfied, click **Submit** and forward to the Staff for Comments. If agreed by Staff, it moves to the **Dean/Director** else it returns back to your **Application History** as a **supervisor / HOD** (this may be automatic based on workflow).
10. **Monitor re-submissions:** if returned, check resubmitted versions and finalize your review.

11. **Supervisors/HODs** that apply using the **HOD** windows can separately view their Application by using the **My Application** Switch and monitor if the application has been approved by the **Director/ DEAN**
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ROLE: DIRECTOR / DEAN (SENIOR REVIEWER)

Purpose for Director/Dean

Provide higher-level validation, assess departmental patterns, endorse recommendations for training or promotion, and forward to Establishment/HR.

Step-by-Step

1. **Log in** with your credentials **PF_NO** and Surname as Default Password.
2. Will be redirected to **change password** for first attempt.
3. **Complete personal details:** confirm name, DOB, staff ID, unit/department, grade and designation, Appointment Date, Qualifications, DOI link (Academic Staff) for publications, upload signature and CV.
4. **Review HOD/Supervisor's comments:** check supervisory scores and feedback.
5. **Audit for fairness:** ensure scoring across the department is consistent and justified.
6. **Add strategic comments:** recommend professional development, mentorship, or performance improvement plans.
7. **Endorse / Return:** either **Endorse** and forward to Establishment/HR or **Return to HOD** for further clarification.
8. **Recommend actions:** flag staff for Promotion, Yearly Increment, or reject review as appropriate.
9. **Director/DEAN** that apply using the **Director** windows can separately view their Application by using the **My Application** Switch and monitor if the application has been approved by the **Higher Authority**.

Notes for Deans/Directors

- Keep comments high level and linked to evidence.
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Role: Establishment Representative (HR / Final Verifier)

Purpose

Final verification for compliance, archiving, and institution-level reporting; issue final clearance and publish results to personnel records.

Step-by-Step

1. **Log in** with your credentials **PF_NO** and Surname as Default Password.
2. Will be redirected to **change password** for first attempt.
3. **Complete personal details:** confirm name, DOB, staff ID, unit/department, grade and designation, Appointment Date, Qualifications, DOI link (**Academic Staff**) only for publications, upload signature and CV.

4. **Check workflow status:** confirm the report passed through required stages (Staff → Supervisor → Dean).
 5. **Verify compliance:** ensure mandatory fields, signatures, and attachments are present. Check staff status against HR records if integrated.
 6. **Resolve conflicts:** if discrepancies exist between levels, return to the relevant reviewer with a clear note of the issue.
 7. **Finalize & Archive:** click **Finalize(submit)**, which locks the record (or moves to the permanent archive) and triggers final notifications.
 8. **Export / Reports:** generate departmental or institution-wide summaries (PDF / Excel). Use filters for date ranges or categories.
 9. **Notify HR & Staff:** system sends confirmation to staff, supervisor and dean that the APER has been processed.
 10. **Maintain Audit Trail:** ensure audit logs are preserved for compliance and future reference.
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Notifications, Deadlines & Escalation

- **Automatic notifications** are sent at each state change (Submitted, Pending, Approved, Rejected).
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Security, Access Control & Data Integrity

- Role-based access control: staff can edit own APER; supervisors can review and comment; Director/Dean and Establishment have higher privileges.
 - Passwords are been saved using secure hashing (e.g., PHP password_hash).
 - Session timeout: recommended 15–30 minutes of inactivity.
 - Audit logs: every action (view, edit, submit, approve) must be logged with user, timestamp.
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Troubleshooting & Common Issues

Issue: I can't see a file I attached earlier

- Solution: Check attachment size/type; re-upload and save; confirm attachment appears in the attachments list.

Issue: Supervisor returned my APER but I don't see the comments

- Solution: Open the History/Notes tab and expand the return reason. If comments are missing, contact your supervisor directly and request a screenshot.

Issue: Approver can't open an attachment

- Solution: Ensure file type is supported (PDF/DOCX/PNG/JPG) and sizes < limit; reattach a compressed copy.

Issue: System timeout while working on long text

- Solution: Compose long narratives in an external editor, paste into the form; check auto-save settings.

FAQs

Q: Can I edit after I submit?

A: Only if Management gives the Directive on that. Establishment-finalized records are locked.

Q: Where do I upload certificates?

A: Use the Attachments section in the APER profile. Label files clearly (e.g., ConferenceCertificate_Jan2024.pdf).

Q: What if I forget to submit before deadline?

A: Contact Establishment immediately. Late submissions may require an approval exception.

Appendix A — Example comment templates

- **Supervisor comment (positive):** “Good teaching performance this year; consider submitting two research papers next year to meet faculty targets.”
 - **Supervisor comment (needs improvement):** “Please provide evidence for the claimed workshop attendance and improve timeliness on result submissions.”
 - **HOD comment (strategic):** “Recommend attending grant-writing workshop; consider mentoring new lecturers.”
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Appendix B — Support & Contacts

- IT Helpdesk: ICT Centre
 - Establishment Office:
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End of guide