



Performance Review Task - Create/Edit Review Workflow and Add Sections

Use the Review Workflow tab to define the review workflow. Every reviewer who participates in a review for an employee must have an assigned step in the performance review. Steps contain information about who is performing the review and what the reviewer completes in the review, such as set goals or questions about the employee. The sequence and weight of the step, when the step is due, and how the step is submitted is also determined here.

You can create new steps, edit the step and its contents, copy the step, and delete the step from the workflow. Each step must have a due date and contain at least one section. By default, when setting up a new review task the review workflow contains a self or employee step and a manager step.

Sections

You also use this page to add sections to the performance review. Sections are the pages that populate the performance review. Typically, sections are created and available for you to select, but if sections are not yet available, you need to create them. *See [Create Review Form Section \(Early Adopter\)](#).*

Additional Steps

To add additional steps, click the Add Steps icon next to Review Steps. *See [Performance Review Task - Review Workflow - Add/Edit Review Step](#).*

To access performance review tasks, go to [Admin > Tools > Performance Management > Tasks](#).

- If you are creating a new review task and you completed the previous page, you can enter information on this page.
- To edit a review task, in the **Options** column, click the Edit icon for the appropriate review task.

Permissions

PERMISSION NAME	PERMISSION DESCRIPTION	CATEGORY
Performance Review Task - Manage	Grants ability to assign performance review tasks and manage activity within those tasks. This permission works in conjunction with the Admin Visibility settings for the performance review task. Administrators who have this permission and are within the Admin Visibility settings can view the task, edit the task, add users, and view the task details. However, the admin cannot edit the Admin Visibility settings for the task. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. The constraints on this permission control which users can be added to the task.	Performance - Administration
Performance Review Task Administration	Grants ability to create/assign performance review tasks and manage activity within those tasks. This permission also gives the ability to enable and view co-planners for a task from the administration pages. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User.	Performance - Administration

Define Performance Review Task

General

Review Workflow

Review Summary

Visibility

Confirm



This task has been started by a user. Only partial edit is allowed for this task.

Specify which steps should be included in this performance review task and what order these steps should appear in. You may configure each step by clicking on the Edit icon. You may also configure who has the responsibility of selecting the reviewer for future steps. Set the due date of each step. The due date must be a relative date, i.e. 30 Day(s). By selecting