Performance > Reviews > Admin Review Tasks > Task Administration

Administrator Topic

Performance Review Task Administration - Overview

Use the Performance Review Task Administration page to create or edit Performance Review Tasks.

The Performance Review Task is the framework of the performance review and may include information such as overall due dates, the review period, rating scales, and who is assigned to participate in the review. Administrators also add sections to the Performance Review Task. Administrators can create, modify or copy a current performance review task.

Administrators must complete the following pages for a Performance Review Task:

- General – Define the name of the performance review, instructions for the reviewer, due dates, who can review and see the review, and define a rating scale if necessary. Some of the information that you define here may be visible to reviewers and reviewees. *See Performance Review Task - Create/Edit - General.*
- Review Workflow – Define who is performing the review, the pages that they complete, and the review progresses (sequence) for reviewees and managers. *See Performance Review Task - Create/Edit Review Workflow and Add Sections.*
- Review Summary – Define the way that the reviewee scores appear in the performance review. *See Performance Review Task - Create/Edit Review Summary.*
- Visibility – Define what reviewees can or cannot see in the performance review. *See Review Task - Create/Edit Visibility.*
- Confirm – Review and confirm all the options selected on the previous Performance Review Task pages and see a preview of how the performance review will appear to end users.*See Review Task - Create/Edit Confirm.*

Note: Before you create or edit a Performance Review Task, performance review sections should already exist. See Performance Review Form Sections Overview.

Administrator are only able to view and administer a task if they are within the Admin Visibility of the task and they have permission to manage performance review tasks. This includes adding users, viewing task details, and editing the task.

To access Performance Review Task Administration, go to Admin > Tools > Performance Management > Tasks.

🔒 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
Task - View	Grants ability to view assigned tasks via Scheduled Tasks screen and Welcome Page My Tasks widget. This is an end user permission.	Core
View Performance Reviews	Grants ability to view the Performance Reviews page, which displays a user's own past performance reviews as well as performance review task steps they've been assigned to complete. This also grants ability to view the Batch Rating page. This permission can be constrained by OU, User's OU, User Self and Subordinates, and User. This is an end user permission.	Performance

Performance Review stration ❓