

Performance Evaluation System Functional Document



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Document Information

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1. Purpose & Scope

1.1 Purpose

The purpose of this document is to outline the functional requirements for the Performance Evaluation System, define system behavior, user interactions, roles, and workflows. The document serves as a guide for developers, designers, testers, administrators, and stakeholders involved in building, reviewing, or maintaining the system.

1.2 Intended Audience

Developers, testers, project managers, HR administrators, management stakeholders, and future maintainers.

1.3 Scope of the System

The system is a web-based application designed to manage employee performance evaluations for interns, corporers, trainees etc. It supports multi-stage evaluation involving self-assessment, line manager review, and calibration review.

The scope of this document includes:

- User and role management
 - Evaluation cycle management
 - Evaluation question management
 - Multi-stage scoring workflow
 - Reporting and export (Excel/PDF)
 - Dashboard and analytics
-

2. System Overview / Product Overview

2.1 System Context

The Performance Evaluation System is a web-based platform for conducting structured performance reviews. The system replaces the current Excel-based process with a role-based, auditable, and workflow-driven evaluation process.

2.2 Target Users / User Classes

- **Admin** – Manages system setup, users, departments, questions, and evaluation cycles.
- **Employee** – Completes self-evaluations and views final results after it has gone through all the other channels.
- **Line Manager** – Reviews employee self-evaluations and provides manager scores and remarks.
- **Calibration Team** – Reviews employee and line manager inputs, provides and submits final scores.

2.3 High-Level Features / Functions

- Role-based login using a single system URL
- Employee self-evaluation
- Line manager review and scoring
- Calibration team final scoring
- Admin configuration of users, departments, levels, and questions
- Dashboard per role
- Export of evaluation reports to Excel and PDF
- Automated email notifications

2.4 Operating Environment & Constraints

The system will operate in a web environment, accessible via modern web browsers on PCs and mobile devices. Users must have internet access. The system must support secure authentication and role-based access control.

3. Functional Requirements

3.1 User & Access Management Module

FR-001 — Role-Based Login

Users log in through a single URL. The system shall redirect users to the appropriate dashboard based on their role (Admin, Employee, Line Manager, Calibration).

FR-002 — User Profile Management

Users are able to update their profile information such as name and password.

FR-003 — Admin User Management

Admin is able to create, read, update, and delete:

- Employees

- Line Managers
- Calibration users
- Departments
- Levels

Admin is able to assign:

- Employees to departments, levels, and line managers
- Line managers to departments

3.2 Evaluation Setup Module (Admin)

FR-004 — Evaluation Cycle Management

Admin is able to create, update, and close evaluation cycles.

FR-005 — Evaluation Question Management

Admin is able to create, edit, and delete evaluation questions and assign them based on department and level.

3.3 Employee Self-Evaluation Module

FR-006 — View Assigned Evaluation

Employees are able to view evaluation questions assigned based on their department and level.

FR-007 — Self Score & Remarks Entry

Employees are able to enter:

- Self score per question
- Self remarks per question

FR-008 — Self-Evaluation Submission

Employees are able to submit their self-evaluation. Once submitted:

- The evaluation shall be locked for the employee
 - The status shall change to “Submitted to Line Manager”
-

3.4 Line Manager Review Module

FR-009 — View Pending Evaluations

Line Managers see a list of employees and pending evaluations for departments they manage.

FR-010 — Manager Score & Remarks Entry

Line Managers are able to:

- View employee self scores and remarks
- Enter manager score and manager remarks per question

FR-011 — Manager Submission

Upon submission:

- The evaluation status shall change to “Submitted to Calibration”
 - The manager’s inputs shall be locked
-

3.5 Calibration Review Module

FR-012 — View Evaluations for Calibration

The calibration team are be able to view:

- Employee self scores and remarks
- Line manager scores and remarks

FR-013 — Final Score & Remarks Entry

The calibration team are be able to enter:

- Final score per question

FR-014 — Final Submission with Confirmation

The system shall display a confirmation message warning that:

- Once submitted, scores cannot be changed

Upon confirmation:

- The evaluation status shall change to “Finalized”
- All scores shall be locked
- The employee shall be able to view final results

3.6 Reporting & Export Module

FR-015 — Dashboard & Analytics

Dashboards shall display:

- Pending evaluations
- Completed evaluations
- Summary statistics per role

FR-016 — Export & Reporting

Authorized users shall be able to download evaluation reports in:

- Excel format

- PDF format

Reports shall include:

- Employee details
 - Scores (self, manager, final)
 - Remarks
 - Final decision/status
-

3.7 Notification & Email Module

FR-017 — Email Notification on Self-Evaluation Submission

When an employee submits their self-evaluation:

- The system shall send an email notification to the assigned line manager.
 - The email shall contain:
 - Employee name
 - Link to review the evaluation
-

FR-018 — Email Notification on Line Manager Submission

When a line manager submits their review:

- The system shall send an email notification to the calibration team.
 - The email shall contain:
 - Employee name
 - Department
 - Link to perform calibration review
-

FR-019 — Email Notification on Finalization

When the calibration team finalizes an evaluation:

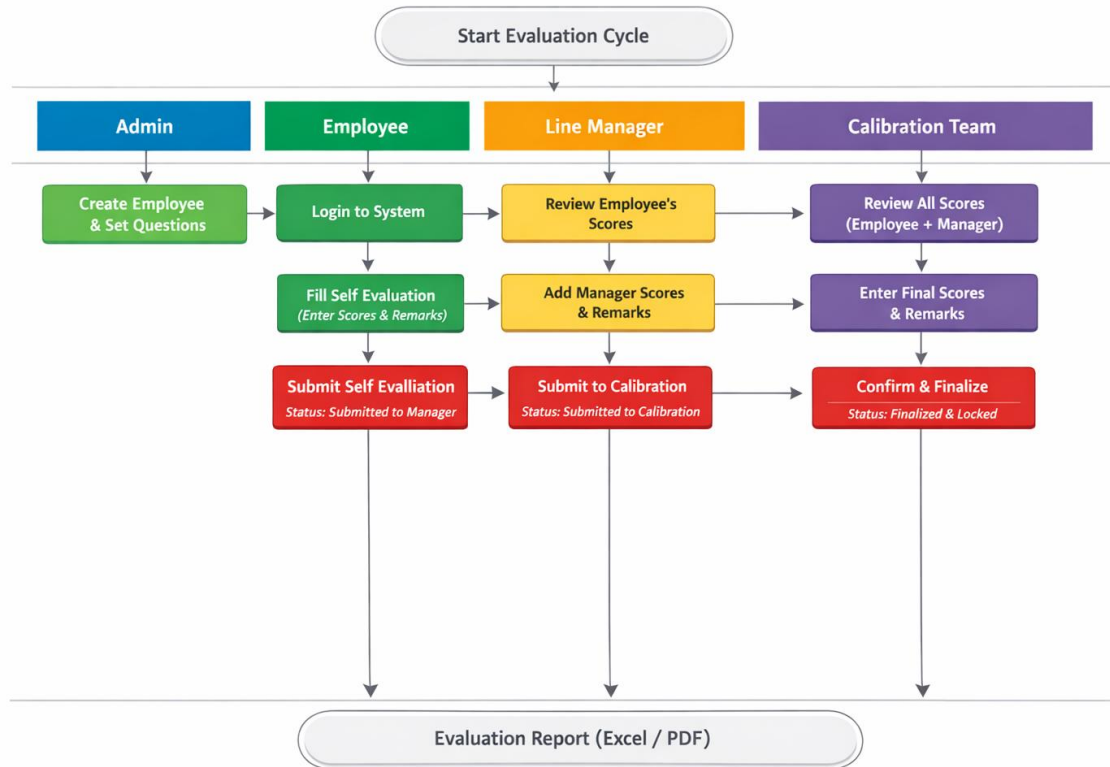
- The system shall send an email notification to:
 - The employee
 - The line manager
 - The email shall notify them that:
 - The evaluation is completed
 - The final report is available for viewing or download
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FR-020 — System Email Templates

The system shall use predefined email templates for:

- Submission notifications
 - Finalization notifications
-

3.8 Process Flow



4. User Interface Requirements

4.1 General UI Principles

- Clean and professional interface
- Responsive design
- Role-based dashboards
- Clear status indicators for evaluation stages

4.2 Key Screens

- Login Page
- Admin Dashboard
- Employee Dashboard
- Line Manager Dashboard

- Calibration Dashboard
 - Evaluation Form (Multi-stage)
 - Reports & Export Page
-

5. Non-Functional Requirements

5.1 Performance

Pages should load within acceptable response times under normal usage conditions.

5.2 Security

- HTTPS encryption
- Role-based access control
- Secure password storage
- Access restrictions based on user role

5.3 Usability

- Simple navigation
 - Works on desktop and mobile browsers
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6. Data Requirements / Data Management

6.1 Data Entities

- User
- Department
- Level
- Evaluation Cycle
- Evaluation Question
- Evaluation Answers (Self, Manager, Final)

6.2 Data Validation

- Required fields enforced
 - Score ranges validated
 - Role-based edit permissions enforced
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7. Assumptions & Dependencies

- Users have internet access
 - Admin users understand basic system configuration
 - The system will be hosted in a secure environment
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8. Risks, Limitations & Constraints

- User adoption may require training
 - Internet connectivity may affect access
 - Data privacy and compliance requirements must be enforced
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9. Future Enhancements

- Advanced analytics and performance trends

- Integration with HR systems