

# 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, corp members, 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.

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# **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.

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## **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:

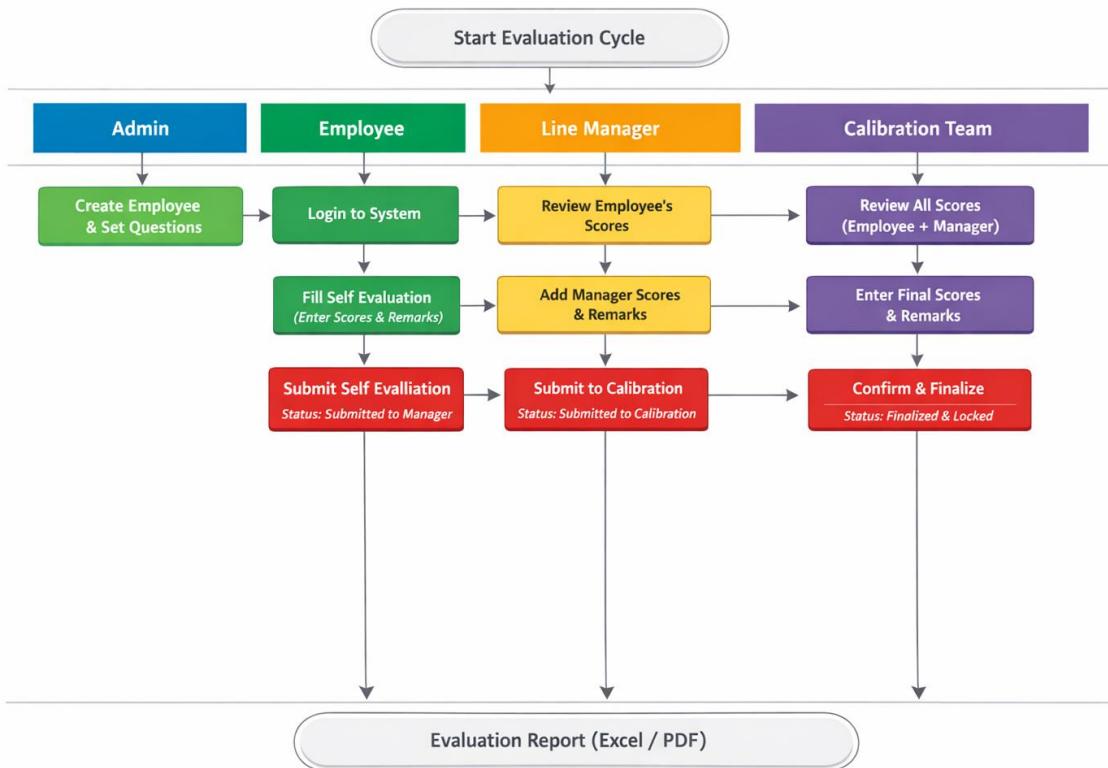
- The system shall send an email notification to:
    - The employee
    - The line manager
  - The email shall notify them that:
    - The evaluation is completed
    - The final report is available for viewing or download
- 

## **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