**PERFORMI:**

**A Performance Management Software**

**Roles:**

Administrator: Manage users and the company account Can view results of anyone from the entire organization.

HR team: Can view results of anyone from the entire organization.

Manager: Can only view the results of subordinates.

Employee: Can only view the result of him/herself. Can not create new appraisals but is allowed to send a peer review.

**Layout:**

LOGIN PAGE (everyone):

* Login form
  + Username
  + Password
  + Register as a new company
  + Forgot Password feature
  + Demo user
    - Administrator
    - HR team
    - Manager
    - Employee

DEMO USER PAGE:

* Instead of creating a brand-new account someone can test the site as an admin, HR, Manager, and employee

NEW COMPANY PAGE (Administrator):

* Join performi by adding your company to their database

HOME PAGE (Everyone):

* Dashboard
  + Shows updates about the app
  + New tasks for the users
  + Updates on performance evaluations

TASKS PAGE (Everyone)

* Shows all the tasks that the user has to complete by a certain deadline

MANAGE COMPANY ACCOUNT PAGE (Administrator)

* General Settings
  + Change company name
  + Determine number of peer reviews every employee has to complete
* Review Cycles
  + Admin decides how many assessments an employee has to do per year

MANAGE USERS PAGE (Administrator)

* Admin can view a users profile, go to the add user page, delete user page

VIEW DIRECTORY PAGE (Everyone)

* View the organizational structure of the company

ADD USER PAGE (Admin, HR)

* Add User form that creates a new user in the database
* Form includes name, birthday, address, reporting to

EDITE PERSONAL INFO (Everyone)

* Edit and update your personal info

MY PERFORMANCE PAGE (Everyone)

* Goals
  + Users can add, edit, update, and remove goals
  + Goals can be added, edited, updated, and removed by their managers as well
  + Past goals can be seen
* Performance review
  + User will fill out performance review
  + Past performance reviews can be seen
  + Manager review will also show up here
* 360 feedback (Managers)
  + Managers will be able to view their employees current 360 feedback results
  + Managers will be able to view their employees past 360 feedback results

EMPLOYEES PAGE (HR, Manager)

* Managers can view their employees goals, performance reviews, 360 Feedback

360 FEEDBACK

* Employees can send peer review to a coworkers
* Employees can give peer feedback on coworkers

**Features:**

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| --- | --- | --- | --- |
| **Feature Name** | **Purpose** | **Functionality** | **Restrictions** |
| Employee Login | Allows for an employee to login to the Perfomi site. | First, the employee has to enter their username and password in the text fields that are given. Next, the employee has to press the login button. | N/A |
| Forgot Password | Allows for employee to reset their password. | Employee clicks on **forgot your password** button. This leads them to a forgot your password page. On that page they enter their old password and then their new one. Then, the employee clicks the reset button. The button leads them back to the employee login page. | N/A |
| Create an account | If it is an employees first time signing in, they need to create a username and password. | Employee clicks on **Create account** button. This button clicked event leads the employee to a create an account page. Employee will enter a username and password in the required fields and then click the create an account button. This button will lead back to the login page. | N/A |
| Sign in as Demo User | Instead of creating a brand-new account someone can test the site as an admin, HR, Manager, and employee. Being signed in as a demo user will create a dummy company with fake employees. | User clicks on the sign in as a **Demo User** button. This will lead them to the demo User page. User clicks on one of the user options (admin, HR, Manager, and employee). Clicking on one of the buttons will lead them to the home page. | N/A |
| Company Sign Up | The head of a company can join the performi performance review platform by signing up. | The head of a company will click on the **sign Up** button on the login page. That click event will trigger the company sign up page. The head of the company will have to enter the company name, first name, last name, username, and password in the given fields. After clicking the sign-up button they will be directed to the home page. | N/A |
| Home page Dashboard | Displays basic info about the performi website. Prompts employees to finish editing their personal info page. Displays useful notifications about tasks that need to be completed. | The user can click on the links that the dashboards display. | N/A |
| tasks dashboard | Shows all the tasks (goals, performance review, peer feedback) that the user has to complete by a certain deadline | Employee can view a tasks that needs to be completed by clicking on the associated button which will lead them to the corresponding page. | N/A |
| Change Company Name | If the company changes their name, the admin can make that update to the Performi website. | The admin can enter a new company name in the text field. To save their changes they press the **Save changes** button. | Only Admins can view this feature. |
| Number of peer reviews | The admin can change the number of peer reviews employees have to do per cycle. | The admin choses how many peer reviews cycles from a drop-down menu. To save their changes they press the **Save Changes** button. | Only Admins can view this feature. |
| Review Cycles | Admin decides how many assessments an employee has to do per year. | The admin has to enter a cycle name, start date, and end date for the corresponding cycle. Clicking the trash button will delete the cycle from the database and visually remove that row (including all the text fields and headings) from the screen. Clicking the add button will add a cycle to the database and visually add a row to the screen.  To save their changes they press the **Save Changes** button. | Only Admins can view this feature. |
| Employee filter | A user can search for any employee in the company, bringing their name to the top of the list. | The user has to enter an employees name in the text field and click the **Search** button. By clicking the search, the employee whose name is entered will be at the top of the list. A user may also click the department dropdown, to narrow down search results. After the dropdown has been selected there will be less people to search from. | N/A |
| Add employee | The admin can add an employee to the database by filling out their personal info, job information and account details. | The admin has to first click add an employee on the manageUsers Page. That will trigger an event to go to the addEmployee page. The admin will have to fill out information about the employee through a form. If the admin clicks the **save** button, a new employee is created, and Admin is redirected to the manageUsers page. | Only an admin/HR can see the addEmployee or manageUsers Pages. |
| View Employees info | The admin/HR team can view an employees personal info. | On the manageUsers page by clicking on the employees name an admin/HR will be redirected to the employees info page. | Only Admins, HR, and the manager of the employee can view this feature. |
| Edit employees info | The admin/HR team can edit an employees personal info. | The user can edit the personal info by refilling out parts of the form they need to change. By clicking the **save** button, the user will get redirected to the last page they were on. | Only Admins, HR and the employee whose personal info it is can view this feature. |
| Remove Employee | Removes an employee from the database. | By clicking the **delete** button, the user will be removed from the performi platform. All of their past info will also be wiped | Only Admins/HR can view this feature. |
| View Directory | A user can view the organizational structure of the company through a flowchart. | By using google charts the flowchart will be updated every time there a new employee added to the company. | N/A |
| Add a goal | A user can add a goal by giving their goal a title, due date, and detailing their S.M.A.R.T goal. | By clicking the **Add a goal** button a dropdown panel shows up. The dropdown panel contains a form which the user can either decide to cancel by clicking the **cancel** or by clicking the **save** button. The cancel button will collapse the dropdown panel. The save button will collapse the dropdown panel and create a new blank comments panel. | Only the employee whose goal it is, and their manager can view this feature. |
| Edit goal | A user can change their goal if they decide they need to tweak the goals objective. | By clicking the **Edit goal** button, a similar dropdown panel to the add a goal feature will show up. The panel will have the same properties as the add a goal panel. | Only the employee whose goal it is, and their manager can view this feature. |
| Remove goal | A user can remove a goal if they realize its worded incorrectly, or its not accurate to their current mindset and etc. | When the user clicks the **remove goal** button, the goal is deleted from the database and the comments panel is removed from the screen. | Only the employee whose goal it is, and their manager can view this feature. |
| Add a comment | A user can add comments to a goal, detailing if their on track. | The user can add a comment by typing their comment in the text field provided and clicking the **post**  button. When the post button is clicked the comment gets added to the comments panel (shows the comment, author, date) | Only the employee whose goal it is, and their manager can view this feature. |
| Edit comment | A user can edit their own comment | By clicking on the **edit** button a user can change their comment by entering new information in the text field. | The user who wrote the comment can view this feature. |
| Remove Comment | A user can remove their comment. | By clicking on the **remove** button the users comment will get deleted from the database. | The user who wrote the comment can view this feature. |
| Submit self-performance review | When a new assessment appears, an employee has to fill out their performance review. | The employee will have to submit their performance review by filling out a form. The form will have 2 dropdowns questions and 3 text field questions that have to be completed in order to submit the form. By clicking the **save & finish later** button, the information filled out in the form will remain on the screen but will not be sent to the manager. By clicking the **submit** button the form will be sent to the manager. The screen will also change from a submit form to a textbox. | The user who needs to fill out the assessment can view this feature. |
| Submit performance review | The manager can fill out a performance review for their employees. | The manager will have to submit their performance review by filling out a form. The form will have 2 text field questions that have to be completed in order to submit the form. By clicking the **save & finish later** button, the information filled out in the form will remain on the screen but will not be sent to the manager. By clicking the **submit** button the form will be sent to the manager. The screen will also change from a submit form to a textbox. | Only a manager can view this feature. |
| Send feedback form | A user can send a peer feedback form to anyone in the company. They need x amount of people to give them feedback. | The user will have to click the **send** button on the /360feedback page to send a peer feedback form to someone else in the company. | N/A |
| Give feedback | A user can give feedback on someone else’s performance. | If an employee gets a peer feedback invitation from another person in the company, they can give feedback to them by pressing the **give feedback** button on the /360feedback page. Clicking the button will trigger a form to show up. The form will have 2 text field questions that have to be completed in order to submit the form. By clicking the **save & finish later** button, the form will disappear from the screen, but all the info will be saved in the database. By clicking the **submit** button the form will be sent to that employees manager and disappear from the screen. The **give feedback** button will also disappear from their name. | N/A |
| View Employees Performance Review | Once the employee has completed their performance review, the manager can view the completed form. | By clicking on the **results** button, it redirects the manager to the employees assessment tab. | Only a manager will be able to access this feature. |
| View Employees goals | The manager can view their employees goals. | By clicking on the **view** button, it redirects the manager to the employees goals tab. | Only a manager will be able to access this feature. |
| View Employees 360 feedback | The manager can view their employees 360 peer feedback forms. | By clicking on the **results** button, it redirects the manager to the employees 360 feedback tab. | Only a manager will be able to access this feature. |
| Change review period | By clicking on the dropdown menu for the different review periods, managers can view their employees old goals, assessments and 360 feedback. |  | Only a manager will be able to access this feature. |
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**Colors:**

e63946, f1faee, a8dadc, 457b9d, 1d3557

**Fonts:**

Comic sans, Montserrat

**Font-weight:**

Regular, Bold