

Performance Management System - Complete Menu Structure (Final Updated)

Updated Project Flow & Structure

Organizational Structure:

- **Company** → **Departments** → **Projects (optional)** → **Employees**
- **Department Master** → Contains multiple Projects
- **Project Master** → Maps to specific Departments, has KRA mapping
- **KRA Master** → Can be domain-specific and project-specific
- **User Management** → Dept + Domain + R1 (Team Lead) + R2 (Manager) mapping

Review Flow:

1. **Employee Self-Assessment** (with ratings, comments, attachments)
2. **R1 Review** (Team Lead - can see employee's data + add own)
3. **R2 Review** (Manager - can see all previous data + add own)
4. **System Calculation** → Green/Yellow/Red zones based on weighted scores

ROLE-BASED MENU STRUCTURE

1. ADMIN/HR ROLE

Role	Menu	Sub Menu	Functions	Fields/Elements
Admin/HR	Dashboard	System Overview	Organization Health Score, System Usage Stats, Performance Distribution	Overall performance metric (0-100%), Active users (148/156), Review completion rate (78%), Performance zones (Green: 35, Yellow: 89, Red: 32)
		HR Analytics	Workforce Analytics, Employee Engagement, Training Metrics	Total headcount (156), Attrition rate (12%), eNPS Score (42), Training completion (156 courses)
	Masters	Department Master	Create/Edit/Delete Departments	Department Name, Description, Department Head, Status

Role	Menu	Sub Menu	Functions	Fields/Elements
		Domain Master	Create/Edit/Delete Work Domains	Domain Name (QA, Development, Marketing), Description, Skills Mapping
		Project Master	Create/Edit/Delete Projects, Map to Departments	Project Name, Department Mapping, Project Lead, Status, KRA Assignment
		KRA Master	Create/Edit/Delete KRAs	KRA Name, Code, Category (Technical/Behavioral/Professional), Description, Domain, Min/Max Score, Weightage
	User Management	User Operations	Add/Edit/Delete Users, Role Assignment	Full Name, Email, Employee Code, Department, Domain, Project, R1 (Team Lead), R2 (Manager), Status
		Reviewer Mapping	Assign R1 and R2 reviewers to employees	Employee List, R1 Assignment, R2 Assignment, Effective Dates
		Bulk Operations	Import/Export Users, Bulk Role Changes	CSV Upload, Bulk Edit Forms, Validation Results
	KRA Management	KRA Library	View All KRAs by Domain/Project	KRA List, Filter by Domain/Project, Usage Statistics
		Project-KRA Mapping	Assign KRAs to Projects	Project Selection, Available KRAs, Selected KRAs, Weightage Distribution
		Template Versioning	Manage KRA Template Versions	Version History, Approval Status, Effective Dates
	Review Management	Review Cycle Management	Create/Initiate Review Cycles	Cycle Name (Q1 2025), Start/End Dates, Departments/Projects Included, Notification Settings
		Review Status Tracking	Monitor Review Progress Across Organization	Employee Name, Department, Project, R1 Status, R2 Status, Overall Status, Days Pending
		Review Analytics	System-wide Review Analytics	Completion Rates by Department, Average Review Time, Bottleneck Analysis
	Reports & Analytics	Organization Reports	Performance Analytics, Trend Analysis	Department Comparisons, Performance Trends, Goal Achievement, Zone Distribution
		Review Compliance	Audit & Governance Reports	Review Completion Compliance, Timeline Adherence, Exception Reports
	System Settings	General Configuration	System-wide Settings	Company Info, Working Hours, Performance Zones (Green ≥75%, Yellow 25-75%, Red <25%), Rating Scales

Role	Menu	Sub Menu	Functions	Fields/Elements
		Notification Settings	Email/SMS Templates	Review Reminder Templates, Escalation Rules, Frequency Settings

2. MANAGER ROLE

Role	Menu	Sub Menu	Functions	Fields/Elements
Manager	Dashboard	Personal Performance	Own Performance Overview	Personal Score, Goals Progress, Feedback Received, Development Activities
		Department Overview	Department Performance Metrics	Department Average, Team Size, Performance Distribution, Project Status, Review Progress
	Projects	Project Management	Manage Projects in Department	Project List, Project KRA Assignment, Team Lead Assignment, Project Performance
		KRA Assignment	Assign KRAs to Projects	Project Selection, Available KRAs (by domain), KRA Selection, Weightage Setting
		Project Performance	Monitor Project Team Performance	Project-wise Performance, Team Member Status, Goal Achievement
	Team Management	Team Performance	Department Team Overview	Employee List, Current Scores, Performance Trends, Review Status, R1/R2 Assignment
		Review Management	Manage Reviews as R2	Pending R2 Reviews, Review Forms, Team Member Assessment, Development Planning
		Resource Planning	Team Resource Allocation	Project Assignments, Workload Distribution, Skills Matrix, Capacity Planning
		My Reviews (R2)	Reviews Assigned as R2 Reviewer	Employee Name, Project, R1 Status, Review Form, Due Date, Priority
	Reviews	Review Tracking	Track Department Review Progress	Review Status by Employee, Bottlenecks, Escalations, Completion Rate
		Review Analytics	Department Review Insights	Completion Rates, Score Distributions, Performance Trends
		Team Goals	Department and Project Goals	Goal Setting, Progress Tracking, Achievement Recognition
	Goals & Feedback	Feedback Management	Give/Receive Feedback	Feedback Forms, 360° Reviews, Recognition Tools

3. TEAM LEAD ROLE

Role	Menu	Sub Menu	Functions	Fields/Elements
Team Lead	Dashboard	Personal Performance	Own Performance Overview	Personal Score, Goals Progress, Leadership Activities, Mentoring Sessions
		Project Team Overview	Direct Reports Performance	Team Members, Average Performance, Review Status, Project Goals
	Team Management	Team Performance	Monitor Project Team	Individual Performance Tracking, Goal Progress, Quality Metrics
		Team Development	Mentoring & Coaching	1:1 Coaching Schedule, Skill Development Plans, Knowledge Transfer
	Reviews	My Reviews (R1)	Reviews Assigned as R1 Reviewer	Employee Name, Self-Assessment Status, Review Form, Evidence Review, Comments
		Review Support	Assist in Review Process	Peer Reviews, Calibration Support, Feedback Contribution
	Goals & Feedback	Project Goals	Project Team Goals	Goal Setting for Project, Progress Monitoring, Team Alignment
		Continuous Feedback	Real-time Feedback System	Recognition, Performance Conversations, Development Recommendations

4. EMPLOYEE ROLE

Role	Menu	Sub Menu	Functions	Fields/Elements
Employee	Dashboard	My Performance	Personal Performance Overview	Current Score (85%), Performance Zone (Green), Goals Progress (5/7), Skill Development (78%)
		Team Context	Project/Team Performance View	Team Average, My Position, Team Goals, Collaboration Metrics
	Reviews	Active Review	Current Review Management	Self-Assessment Form, KRA Ratings (1-10), Comments Box, File Attachments, Evidence Upload
		Review History	Past Reviews and Feedback	Previous Scores, Trend Analysis, R1/R2 Comments, Development Progress
		Review Status	Track Review Progress	Current Status (Self/R1/R2), Timeline, Next Actions, Feedback Received
	Goals	My Goals	Personal Goal Management	Goal Setting, Progress Updates, Evidence Collection, Achievement Tracking

Role	Menu	Sub Menu	Functions	Fields/Elements
		Goal History	Historical Goal Performance	Previous Goals, Achievement Rate, Growth Areas
	Feedback	Feedback Exchange	Give/Receive Feedback	Request Feedback, Peer Feedback, View Feedback History, Recognition Wall
	Profile	Personal Information	Profile Management	Personal Details, Skills Update, Contact Info, Career Preferences
		My Reviewers	View Reporting Structure	R1 (Team Lead), R2 (Manager), Review Chain, Escalation Path

REVIEW FORM STRUCTURE (Matrix View)

Employee Self-Assessment Section:

- **KRA Name | Self Rating (1-10) | Comments | Attachments | Evidence Links**

R1 Review Section (Team Lead):

- **View Employee Data | R1 Rating (1-10) | R1 Comments | R1 Attachments | Development Notes**

R2 Review Section (Manager):

- **View All Previous Data | R2 Rating (1-10) | R2 Comments | R2 Attachments | Final Recommendations**

System Calculation:

- **Weighted Score | Final Percentage | Performance Zone | Improvement Areas | Next Quarter Goals**

REVIEW STATUS TRACKING

Status Indicators:

- **🕒 Not Started** - Employee hasn't begun self-assessment
- **📝 Self-Assessment In Progress** - Employee is filling form
- **⏳ Pending R1** - Waiting for Team Lead review
- **🔄 R1 Complete, Pending R2** - Waiting for Manager review
- **✅ Review Complete** - All reviewers done, score calculated
- **⚠️ Overdue** - Past deadline at any stage

Tracking Views:

- **Employee Level:** Can see own status only
- **Team Lead Level:** Can see all direct reports' status
- **Manager Level:** Can see entire department status
- **Admin Level:** Can see organization-wide status with drill-down

PERFORMANCE ZONES CONFIGURATION

Zone Definition:

- **Green Zone:** ≥ 75 th percentile (Top performers)
- **Yellow Zone:** 25th-75th percentile (Average performers)
- **Red Zone:** < 25 th percentile (Needs improvement)

Zone Features:

- **Color-coded dashboards**
- **Automatic alerts for Red zone employees**
- **Development plan recommendations**
- **Manager notification for zone changes**

KEY WORKFLOW SUMMARY

1. **Setup Phase:** Admin creates Departments → Projects → Assigns KRAs to Projects → Creates Users with R1/R2 mapping
2. **Review Initiation:** Admin initiates review cycle → All employees notified
3. **Review Process:** Employee Self-Assessment → R1 Review → R2 Review → System Calculation
4. **Tracking:** Real-time status tracking at all levels with escalation alerts
5. **Analytics:** Performance zones, trends, and development planning

This structure provides complete visibility, simplified navigation, and comprehensive review management while maintaining the flexibility for different organizational structures (with or without projects/team leads).