



Performance Management

User Guide

Create structured review cycles, select competencies, and assign the right employees.

1

Open

Access Performance Management

2

Configure

Set cycle details and review components

3

Evaluate

Select the competencies

4

Assign

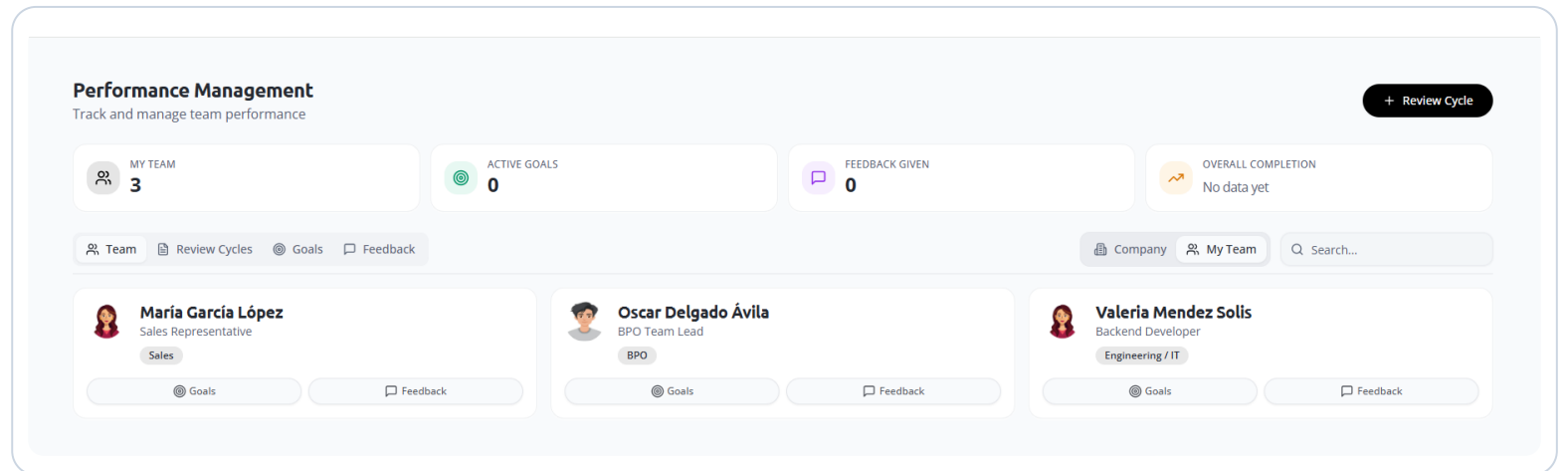
Add employees to the cycle

STEP 1

Open Performance Management

Access the workspace used to manage teams, goals, feedback, and review cycles.

- 1 **Open Performance Management from the platform navigation.**
- 2 **Select the Review Cycles tab.**
- 3 **Click + Review Cycle in the upper-right corner.**



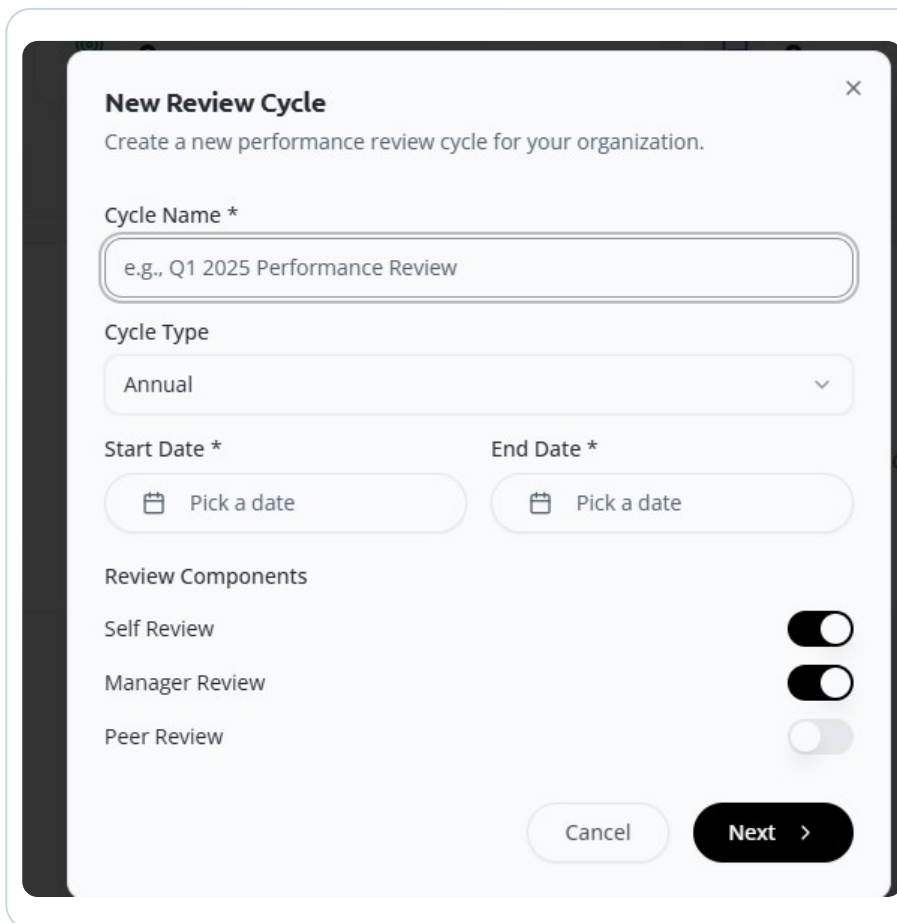
The dashboard also shows team members, active goals, feedback, and overall completion.

STEP 2

Enter the review cycle details

Define when the cycle takes place and which types of review will be included.

- 1 Enter a clear cycle name.
- 2 Select the cycle type and the start and end dates.
- 3 Enable Self Review, Manager Review, and Peer Review as needed.
- 4 Click Next to continue.



New Review Cycle ×

Create a new performance review cycle for your organization.

Cycle Name *

e.g., Q1 2025 Performance Review

Cycle Type

Annual

Start Date * End Date *

Pick a date Pick a date

Review Components

Self Review ☒

Manager Review ☒

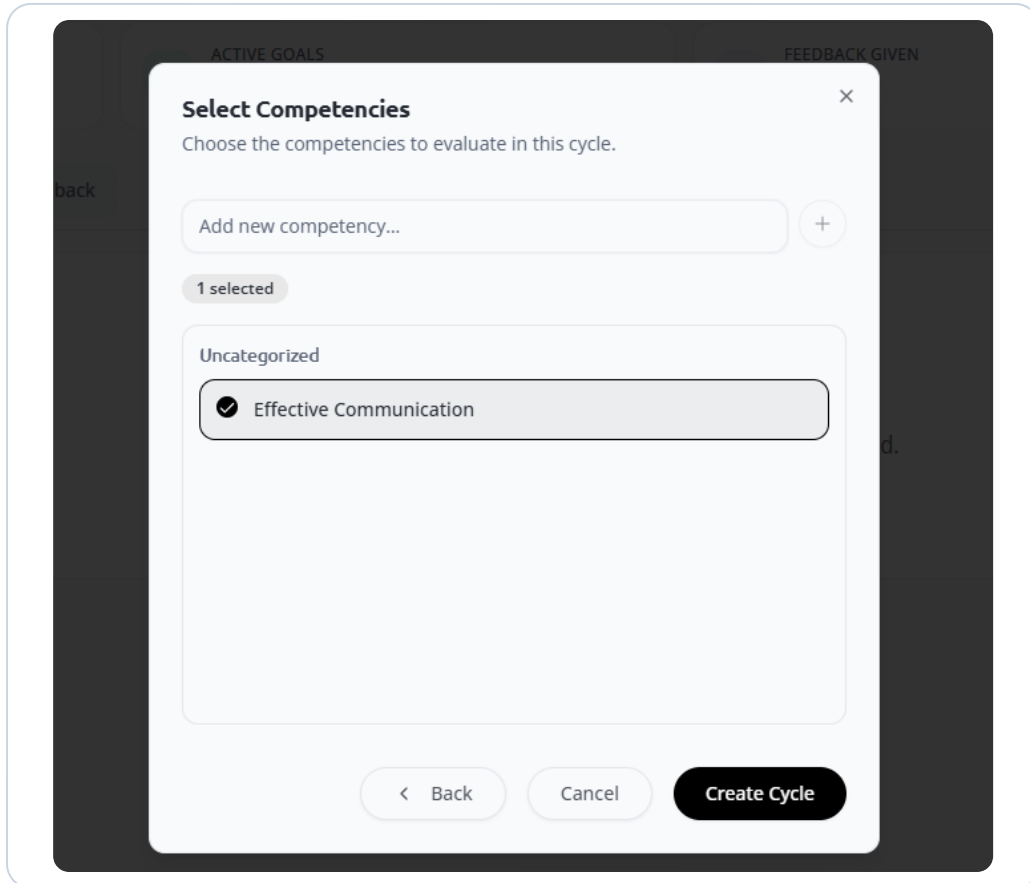
Peer Review ☐

Cancel Next >

STEP 3

Select the competencies

Choose the competencies employees will be evaluated against during this cycle.



The screenshot shows a 'Select Competencies' dialog box with a close button (X) in the top right corner. The dialog contains the text 'Choose the competencies to evaluate in this cycle.' Below this is an input field labeled 'Add new competency...' with a plus icon to its right. A status bar indicates '1 selected'. Under the heading 'Uncategorized', the competency 'Effective Communication' is listed with a checkmark icon to its left. At the bottom of the dialog are three buttons: '< Back', 'Cancel', and 'Create Cycle'.

- 1 **Select one or more existing competencies.**
- 2 Use Add new competency when another evaluation criterion is required.
- 3 Review the selected count.
- 4 Click Create Cycle to save the review cycle.

STEP 4

Review the new cycle

Confirm the dates, review components, competencies, and current assignment status.

Performance Review Q2 2026

draft

0 2

0 3

3/31/2026 - 6/29/2026

0 members

Progress: 0/0

0% complete

Self Review

0%

Manager Review

0%

Peer Review

0%

Goal Completion

0%

Linked Competencies

Leadership

Communication

Technical Skills

Teamwork

AI Insights

Overall positive review cycle with strong self-review participation. Manager reviews trending behind schedule. 3 high performers identified, 2 employees flagged for development support.

0 2 Bias Alert

0 3 Performance Risk

0 5 High Performer

0 1 Engagement Drop

Assign to cycle

View insights

A newly created cycle remains in draft with 0 members until employees are assigned.

STEP 5

Assign employees to the cycle

Select the people who should participate, then confirm the assignment.

- 1 Click **Assign to cycle** on the review cycle card.
- 2 Select individual employees or use **Select all**.
- 3 Review the selected employee count.
- 4 Click **Assign** to add them to the cycle.

