

PERFORMANCE MANAGEMENT SYSTEM · V1.0.0

Administrator Guide

Installation, configuration, user & role management, Workflow
Administration, security, and day-to-day operations for
HR/System Administrators.

Performance Management System · Administrator Guide · Confidential

1.	Installation & first run
2.	System Settings overview
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1. Installation & first run

Prerequisites: .NET 8 runtime, PostgreSQL 16. A `docker-compose.yml` is provided for a local development database.

```
docker compose up -d
dotnet run --project src/PerformanceManagement.Web
```

On first startup the application automatically applies all pending Entity Framework Core migrations and seeds core reference data (departments, KPI/competency masters, rating scales, job families) — no manual database setup step is required.

PRODUCTION SAFETY GUARD

The application **refuses to start** in a Production environment if the shipped default admin password, Login-As verification password, default employee password, or the local-development database connection string are still unchanged. Override each via environment variable or configuration before deploying — see the Deployment Guide.

Default local-development accounts: `admin` (HR Administrator) and one account per employee (their 4-digit employee code as username).

2. System Settings overview

All runtime-configurable behavior lives on one tabbed page: **System Settings** (HR Administrator only). Each tab saves independently.

Dashboard

PM Form

PM Form Summary

Employee Master

KPI Master

Competency Master

Reference Master

Reports

User Management

Login As

Scheduled Jobs

Workflow Administration

System Settings

Apex Corporation

ENعربي99+Administrator (admin)Sign out

System Settings

GeneralPerformance ReviewEmailAuthenticationSecurityDashboardBranding

General

COMPANY NAME

Apex Corporation

APPLICATION NAME

Performance Management System

COMPANY ADDRESS

1 Summit Plaza, Springfield, ST 00000

CONTACT EMAIL

hr@apexcorp.demo

APPLICATION BASE URL

http://localhost:5274

Used to build the action links inside outgoing email — e.g. "https://localhost:5273" for local testing.

Company logo is managed from the Branding tab.

☒ Language Selection

When enabled, users can switch the application between English and Arabic. When disabled, the language switcher is hidden everywhere and the application always runs in English, regardless of any previously saved language cookie or preference.

Save General Settings

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System Settings — General tab.

TAB	CONTROLS
General	Company name, application name, logo, address, contact email, application base URL (used to build links in outgoing email), language-selector master switch.
Performance Review	Current review year, mid-year/end-year review window dates, achievement-entry start dates, submit-to-HR start date.
Email	SMTP host/port/username/password, sender name/email, SSL toggle, notifications on/off, development redirect address.
Authentication	Default new-user password, password complexity requirement, minimum password length, session timeout, Login-As verification password, max login attempts.
Security	Audit logging on/off, account lockout duration, password expiry (days), "remember me" duration.
Dashboard	Welcome message, announcement banner shown to all users.
Branding	Company logo upload (PNG/JPG/GIF only), primary/secondary color, footer text.

Every save on this page is recorded in the audit trail, including the Security tab's audit-logging toggle itself — so it is never possible to silently disable auditing without a trace.

3. Email / SMTP configuration

The screenshot displays the 'System Settings' page with the 'Email' tab selected. The left sidebar contains navigation links: Dashboard, PM Form, PM Form Summary, Employee Master, KPI Master, Competency Master, Reference Master, Reports, User Management, Login As, Scheduled Jobs, Workflow Administration, and System Settings. The main content area is titled 'System Settings' and includes tabs for General, Performance Review, Email (active), Authentication, Security, Dashboard, and Branding. The 'Email Settings (SMTP)' section contains the following fields and options:

- SMTP HOST:** smtp.gmail.com
- SMTP PORT:** 587
- USERNAME:** user@example.com
- PASSWORD:** Not set
- SENDER NAME:** Apex Corporation
- SENDER EMAIL:** hr@apexcorp.demo
- ☒ **Enable SSL / STARTTLS**
- ☒ **Enable Email Notifications**
- DEVELOPMENT REDIRECT:** e.g. you@example.com

A safety guardrail note states: 'Safety guardrail: while set, every workflow email is redirected here instead of the real employee address.' At the bottom of the settings section are two buttons: 'Save Email Settings' and 'Send Test Email'.

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System Settings — Email tab.

1. Enter your SMTP host, port, username, and password, sender name and address, and whether to use SSL.
2. Click **Send Test Email** to verify connectivity before relying on it (this tests the currently *saved* configuration — save first if you just changed something).
3. Leave **Development Redirect Email** blank for normal production use — mail goes to real recipients. Set it only when you deliberately want every outgoing email captured at one address instead (e.g. rehearsing against real imported data without emailing real employees).

SAFETY NET

The SMTP password is encrypted at rest (ASP.NET Core Data Protection) — it is never shown in plaintext once saved, only whether a password is currently set.

Six categories of email are sent automatically by the workflow (acknowledgement request, employee-acknowledged notice to manager, submitted-to-HR notice, HR-1-approved notice, final-approval notice, HR-revert notice), plus a daily reminder and a weekly HR escalation digest for overdue reviews. All are bilingual (English/Arabic, matching the recipient's saved language preference) and carry a signed deep link straight to the relevant form.

4. User & role management

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	1036	Khalid Farouk	khalid.farouk@apexcorp.demo	Employee	1036	Active · must change password	Edit
	1037	Luis Lopez	luis.lopez@apexcorp.demo	Employee	1037	Active · must change password	Edit
	1039	Anders Kowalski	anders.kowalski@apexcorp.demo	Employee	1039	Active · must change password	Edit

User Management — search, create, and edit accounts.

Two roles exist: **HR Administrator** (full system access) and **Viewer** (read-only access to reference data, employee master, and reports — no ability to save/mutate anything). Any account without either role is treated as a regular employee/manager, whose access is entirely determined by the manager-assignment table and the PM Form's own per-record authorization (their own record, or their direct reports').

- **Create a user:** link it to an existing employee record (auto-fills name), set a username, and either use the organization default password or set one explicitly. The account is forced to change its password on first login.
- **Reset a password:** from the Edit page, generates a new password and forces a change on next login. Recorded in the audit trail.
- **Deactivate:** mark the account inactive rather than deleting it — preserves history.

5. Employee & reference master data

Employee Master

Search

SEARCH (CODE, NAME, USERNAME OR EMAIL)

DEPARTMENT

ACTIVE STATUS

e.g. 1504, Alfahad, 0854, na

All Departments

Active only

Search

+ New Employee

CODE	NAME	USERNAME	DEPARTMENT	SECTION	DESIGNATION	GRADE	JOIN DATE	DIRECT MANAGER	STATUS	SOURCE	
1001	John Smith	1001	Corporate Strategy		Chief Officer	1	19/07/2016	—	Active	MANUAL	<button>Edit</button>
1002	Michael Chen	1002	Finance & Accounting		Chief Officer	1	02/02/2017	—	Active	MANUAL	<button>Edit</button>
1003	Priya Patel	1003	Operations		Chief Officer	1	13/09/2018	—	Active	MANUAL	<button>Edit</button>
1004	Omar Hassan	1004	Risk Management		Chief Officer	1	24/04/2019	—	Active	MANUAL	<button>Edit</button>
1005	Maria Garcia	1005	Human Resources		Chief Officer	1	07/11/2020	—	Active	MANUAL	<button>Edit</button>
1006	Kwame Okafor	1006	Claims Management		Senior Manager	2	18/06/2021	1001 - John Smith	Active	MANUAL	<button>Edit</button>
1007	Hans Muller	1007	Claims Management		Manager	2	01/01/2022	1002 - Michael Chen	Active	MANUAL	<button>Edit</button>
1008	James Wilson	1008	Underwriting		Senior Manager	2	12/08/2023	1003 - Priya Patel	Active	MANUAL	<button>Edit</button>
1009	James Johnson	1009	Underwriting		Manager	2	23/03/2024	1004 - Omar Hassan	Active	MANUAL	<button>Edit</button>
1010	David Wang	manager	Sales & Distribution		Senior Manager	2	06/10/2025	1005 - Maria Garcia	Active	MANUAL	<button>Edit</button>
1011	Raj Sharma	1011	Sales & Distribution		Manager	2	17/05/2015	1001 - John Smith	Active	MANUAL	<button>Edit</button>
1012	Hassan Ali	1012	Marketing & Brand		Senior Manager	2	28/12/2016	1002 - Michael Chen	Active	MANUAL	<button>Edit</button>
1013	Carlos Rodriguez	1013	Marketing & Brand		Manager	2	11/07/2017	1003 - Priya Patel	Active	MANUAL	<button>Edit</button>
1014	Amara Mensah	1014	Finance & Accounting		Senior Manager	2	22/02/2018	1004 - Omar Hassan	Active	MANUAL	<button>Edit</button>
1015	Ingrid Schmidt	1015	Finance & Accounting		Manager	2	05/09/2019	1005 - Maria Garcia	Active	MANUAL	<button>Edit</button>
1016	Anderson Davis	1016	Human Resources		Senior Manager	2	16/04/2020	1001 - John Smith	Active	MANUAL	<button>Edit</button>
1017	Robert Williams	1017	Human Resources		Manager	2	27/11/2021	1002 - Michael Chen	Active	MANUAL	<button>Edit</button>
1018	Kevin Li	1018	Information Technology		Senior Manager	2	10/06/2022	1003 - Priya Patel	Active	MANUAL	<button>Edit</button>
1019	Amit Kumar	1019	Information Technology		Manager	2	21/01/2023	1004 - Omar Hassan	Active	MANUAL	<button>Edit</button>
1020	Ahmed Khan	1020	Legal & Compliance		Senior Manager	2	04/08/2024	1005 - Maria Garcia	Active	MANUAL	<button>Edit</button>
1021	Jose Martinez	1021	Legal & Compliance		Manager	2	15/03/2025	1001 - John Smith	Active	MANUAL	<button>Edit</button>
1022	Chidi Adeyemi	1022	Risk Management		Senior Manager	2	26/10/2015	1002 - Michael Chen	Active	MANUAL	<button>Edit</button>
1023	Lars Andersson	1023	Risk Management		Manager	2	09/05/2016	1003 - Priya Patel	Active	MANUAL	<button>Edit</button>
1024	Emily Clark	1024	Actuarial Services		Senior Manager	2	20/12/2017	1004 - Omar Hassan	Active	MANUAL	<button>Edit</button>
1025	Michael Brown	1025	Actuarial Services		Manager	2	03/07/2018	1005 - Maria Garcia	Active	MANUAL	<button>Edit</button>
1026	Jason Zhang	1026	Customer Service		Senior Manager	2	14/02/2019	1001 - John Smith	Active	MANUAL	<button>Edit</button>
1027	Anita Singh	1027	Customer Service		Manager	2	25/09/2020	1002 - Michael Chen	Active	MANUAL	<button>Edit</button>
1028	Ali Rahman	1028	Operations		Senior Manager	2	08/04/2021	1003 - Priya Patel	Active	MANUAL	<button>Edit</button>
1029	Ana Hernandez	1029	Operations		Manager	2	19/11/2022	1004 - Omar Hassan	Active	MANUAL	<button>Edit</button>
1030	Zola Nwosu	1030	Internal Audit	9 / 23	Senior Manager	2	02/06/2023	1005 - Maria Garcia	Active	MANUAL	<button>Edit</button>
1031	Emmanuel Okafor	1031	Corporate Strategy		Manager	2	10/03/2024	1001 - John Smith	Active	MANUAL	<button>Edit</button>

1031	Sofia Nowak	1031	Internal Audit	Manager	2	13/01/2024	1001 - John Smith	Active	MANUAL	<button>Edit</button>
1032	David Lewis	1032	Corporate Strategy	Performance Manager	2	24/08/2025	1002 - Michael Chen	Active	MANUAL	<button>Edit</button>
1033	William Jones	1033	Corporate Strategy	Manager	2	07/03/2015	1003 - Priya Patel	Active	MANUAL	<button>Edit</button>

Employee Master — search, department/manager assignment, termination.

The **Employee Master** page manages the employee roster (department, section, designation, grade, direct manager, join/termination date). The **Reference Master** page (four tabs) manages everything the review workflow draws on:

Apex Corporation

Administrator (admin)

Sign out

Reference Master — KPI & Competency Masters, KPI Reference Codes

KPI Master

Competency Master

Departments

Job Families & Rating Scales

Add Department

DEPARTMENT CODE

DEPARTMENT NAME

Active

DESCRIPTION

Create Department

Clear

SEARCH (CODE, NAME OR DESCRIPTION)

e.g. FIN or Finance

Search

CODE	NAME	DESCRIPTION	STATUS	
ACT	Actuarial Services	Active	Edit Disable	
CLM	Claims Management	Active	Edit Disable	
STR	Corporate Strategy	Active	Edit Disable	
CSR	Customer Service	Active	Edit Disable	
FIN	Finance & Accounting	Active	Edit Disable	
HRD	Human Resources	Active	Edit Disable	
ITD	Information Technology	Active	Edit Disable	
AUD	Internal Audit	Active	Edit Disable	
INV	Investments & Treasury	Active	Edit Disable	
LGL	Legal & Compliance	Active	Edit Disable	
MKT	Marketing & Brand	Active	Edit Disable	
OPS	Operations	Active	Edit Disable	
RSK	Risk Management	Active	Edit Disable	
SLS	Sales & Distribution	Active	Edit Disable	
UWR	Underwriting	Active	Edit Disable	

15 departments. Departments are never deleted — disable them instead to preserve history for existing employees.

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Department Master.

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Sign out

Reference Master — KPI & Competency Masters, KPI Reference Codes

KPI Master

Competency Master

Departments

Job Families & Rating Scales

Add KPI (KPI019)

KPI CODE

PERSPECTIVE

DEPARTMENTS (COMMA LIST OR * FOR ALL)

STATUS

KPI NAME (ENGLISH)

KPI NAME (ARABIC)

PURPOSE / DEFINITION (EN)

PURPOSE / DEFINITION (AR)

FORMULA / METRIC (EN)

FORMULA / METRIC (AR)

MIN WEIGHT %

MAX WEIGHT %

REMARKS

Save KPI

Clear

SEARCH (CODE OR NAME)

e.g. KPI005 or Reinsurance

PERSPECTIVE

DEPARTMENT

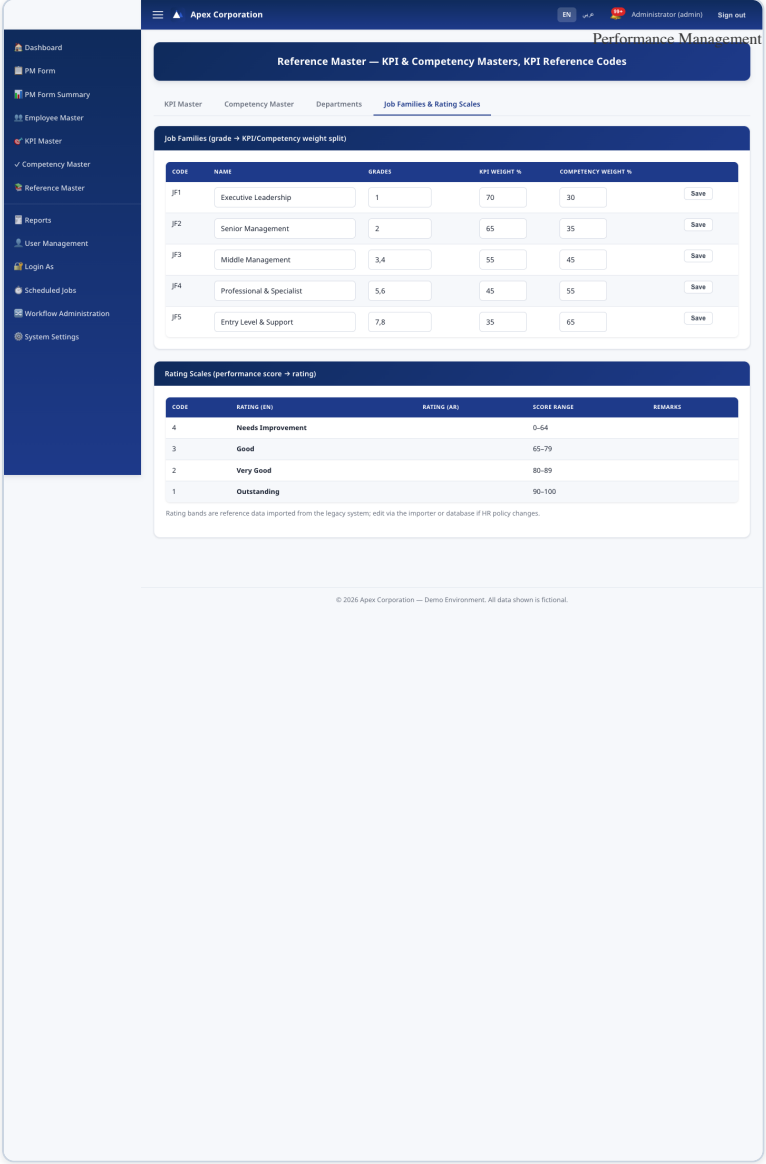
Search

CODE	NAME	PERSPECTIVE	DEPARTMENTS	WEIGHT RANGE	STATUS	MODIFIED
KPI001	Revenue Growth	Financial	*	10-25%	Active	Edit
KPI002	Underwriting Profitability	Financial	*	10-25%	Active	Edit
KPI003	Cost Efficiency Ratio	Financial	*	10-25%	Active	Edit
KPI004	Investment Return	Financial	*	10-25%	Active	Edit
KPI005	Budget Adherence	Financial	*	10-25%	Active	Edit
KPI006	Customer Satisfaction Score	Customer	*	10-25%	Active	Edit
KPI007	Policy Renewal Rate	Customer	*	10-25%	Active	Edit
KPI008	Claims Resolution Time	Customer	*	10-25%	Active	Edit
KPI009	Net Promoter Score	Customer	*	10-25%	Active	Edit
KPI010	Cross-Sell Ratio	Customer	*	10-25%	Active	Edit
KPI011	Process Automation Rate	Internal Processes	*	10-25%	Active	Edit
KPI012	Claims Processing Accuracy	Internal Processes	*	10-25%	Active	Edit
KPI013	Risk Exposure Reduction	Internal Processes	*	10-25%	Active	Edit
KPI014	Compliance Adherence	Internal Processes	*	10-25%	Active	Edit
KPI015	Digital Transformation Progress	Internal Processes	*	10-25%	Active	Edit
KPI016	Employee Training Completion	Learning & Growth	*	10-25%	Active	Edit
KPI017	Talent Retention Rate	Learning & Growth	*	10-25%	Active	Edit
KPI018	Leadership Development Participation	Learning & Growth	*	10-25%	Active	Edit

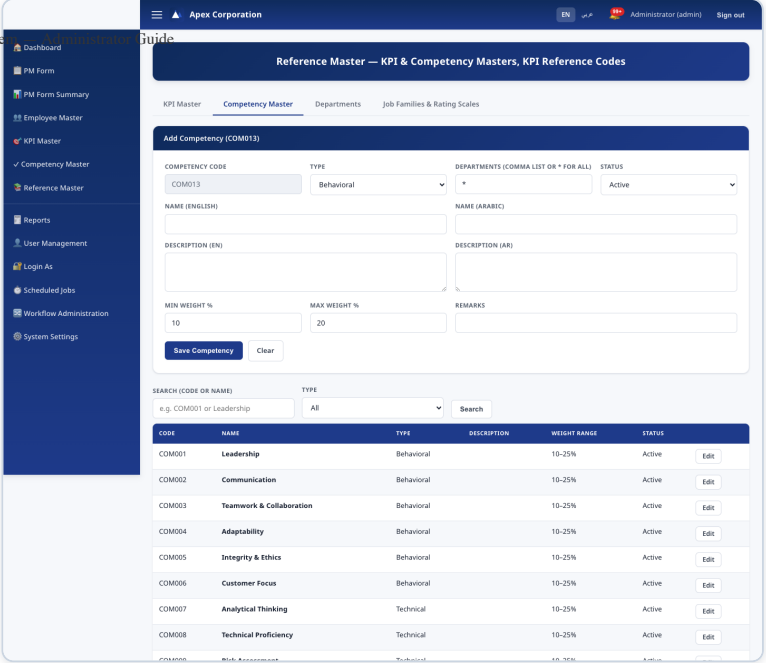
18 KPIS.

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KPI Master.



Competency Master.



Job Families & Rating Scales.

Departments are never hard-deleted (existing employee records may reference them) — disabling one hides it from new-assignment dropdowns while leaving historical records intact. Job Families determine the KPI/competency weight split by employee grade, and must sum to exactly 100%.

6. Scheduled jobs

Dashboard

PM Form

PM Form Summary

Employee Master

KPI Master

Competency Master

Reference Master

Reports

User Management

Login As

Scheduled Jobs

Workflow Administration

System Settings

Apex Corporation

ENعربي99+Administrator (admin)Sign out

Scheduled Jobs

JOB	STATUS	NEXT RUN	PREVIOUS RUN	DURATION	RESULT	
GenerateAnnualForms Generate Annual Performance Forms (1 January)	● Enabled	01/01/2027 00:05	Never run	—	—	Run NowDisableView Log
OpenMidYearReview Open Mid-Year Reviews (1 June)	● Enabled	01/06/2027 00:05	Never run	—	—	Run NowDisableView Log
OpenEndYearReview Open End-Year Reviews (1 November)	● Enabled	01/11/2026 00:05	Never run	—	—	Run NowDisableView Log
DailyReminder Daily reminder emails for actionable forms	● Enabled	29/07/2026 08:00	28/07/2026 05:03	0.2s	14 reminder(s) sent for 14 eligible form(s).	Run NowDisableView Log
WeeklyEscalation Weekly escalation reminders for overdue forms	● Enabled	03/08/2026 08:00	Never run	—	—	Run NowDisableView Log
MonthlyCleanup Monthly cleanup of stale operational data	● Enabled	01/08/2026 02:00	Never run	—	—	Run NowDisableView Log

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Scheduled Jobs — last run status, duration, and result for each job.

JOB	SCHEDULE	PURPOSE
Generate Annual Performance Forms	1 January	Creates a blank review record for every active employee for the new year.
Open Mid-Year Reviews	1 June	Informational marker that the mid-year window has opened.
Open End-Year Reviews	1 November	Informational marker that the end-year window has opened.
Daily Reminder	Daily, 08:00	Emails whoever currently owns an actionable review that has been sitting too long.
Weekly Escalation	Monday, 08:00	Single digest email to HR listing every review overdue beyond the escalation threshold.
Monthly Cleanup	1st of month, 02:00	Purges email log entries older than 180 days (never touches the audit log or impersonation log).

Each job can be manually triggered ("Run Now") from this page for testing or catch-up purposes. Run history is kept in a dedicated table, independent of the in-memory scheduler, so it survives an application restart.

7. Localization

The language switcher (top bar) is available on every page. A System Settings master switch can disable it organization-wide, forcing English for everyone. Each user's own language choice is remembered on their account and used for the UI, PDF reports, and outgoing email regardless of who else is signed in.

لوحة التحكم

Annual Review Cycle Open — performance calibration starts next week 🗓️

Welcome to the Apex Corporation performance portal. HR training available Friday

الإنجاز الإجمالي

73%

التماريز المنشأة (2026)

195

الموظفون

200

تفاصيل حصة التماريز

الإجمالي

195

نهائي

146

لقد التزم

47

جاء / لم يبدأ

2

إنجاز الأقسام وتقديمها وأداؤها

القسم	الموظفون	التقدم	نسبة الإكمال	متوسط الدرجة
Finance & Accounting	14	92%	78%	78.10
Human Resources	14	92%	71%	69.09
Operations	14	92%	64%	79.66
Risk Management	14	92%	78%	75.43
Corporate Strategy	14	92%	57%	50.99
Actuarial Services	13	100%	92%	76.52
Internal Audit	13	100%	76%	78.76
Claims Management	13	92%	53%	69.38
Customer Service	13	100%	84%	76.20
Investments & Treasury	13	100%	76%	77.60
Information Technology	13	92%	69%	70.79
Legal & Compliance	13	100%	100%	77.59
Marketing & Brand	13	100%	53%	63.29
Sales & Distribution	13	100%	76%	74.80
Underwriting	13	100%	61%	66.43

التقارير

بيانات الموظفين

فتح ملخص نماذج الأداء

النشاط الأخير

12:00 2026 ديسمبر 20	Workflow Administration: Reopen Review: Reason: Manager flagged a scoring error after finalization — reopened for correction.; Previous: Approved; New: Employee Acknowledged; — admin
12:00 2026 ديسمبر 20	Workflow Administration: Reopen Review: Reason: Manager flagged a scoring error after finalization — reopened for correction.; Previous: Approved; New: Employee Acknowledged; — admin
12:00 2026 ديسمبر 20	Workflow Administration: Reopen Review: Reason: Manager flagged a scoring error after finalization — reopened for correction.; Previous: Approved; New: Employee Acknowledged; — admin
12:00 2026 ديسمبر 20	Workflow Administration: Reopen Review: Reason: Manager flagged a scoring error after finalization — reopened for correction.; Previous: Approved; New: Employee Acknowledged; — admin
12:00 2026 ديسمبر 20	Workflow Administration: Reopen Review: Reason: Manager flagged a scoring error after finalization — reopened for correction.; Previous: Approved; New: Employee Acknowledged; — admin
12:00 2026 ديسمبر 15	Workflow Administration: Resend Notification: Reason: Employee reported the confirmation email never arrived.; Previous: Approved; New: Approved; — admin
12:00 2026 ديسمبر 15	Workflow Administration: Unlock Review: Reason: Employee needs to correct a typo in one field.; Previous: Approved; New: Approved; — admin
12:00 2026 ديسمبر 15	Workflow Administration: Resend Notification: Reason: Employee reported the confirmation email never arrived.; Previous: Approved; New: Approved; — admin

لوحة التحكم 🏠

نموذج الأداء 📄

ملخص نماذج الأداء 📊

بيانات الموظفين 👤

مؤشرات الأداء الرئيسية 📈

التقارير ✅

البيانات المرجعية 📋

التقارير 📄

إدارة المستخدمين 👤

تسجيل الدخول كـ 🗝️

المهام المجدولة 🕒

إدارة سير العمل 🔄

إعدادات النظام ⚙️

8. Security & audit

- **Account lockout:** configurable failed-attempt threshold and lockout duration (Settings → Authentication/Security). Applies equally to every account, including administrators.
- **Password policy:** minimum length, complexity requirement, and expiry (days) — all admin-configurable.
- **Audit trail:** every login attempt (success, failure, lockout), every Workflow Administration override, every settings change, every user-management action, and every department change is recorded with actor, timestamp, and detail. Visible on the Dashboard's Recent Activity panel and per-review on the Workflow Administration Details page.
- **"Login As"** — impersonate another user for support/troubleshooting, gated by a separate verification password (distinct from your own account password) and a 5-minute re-verification window. Every session is logged (who, whom, when, IP) and displayed on the same page.

The screenshot displays the 'Login As' verification interface. The top header shows 'Apex Corporation' and the user 'Administrator (admin)' with a 'Sign out' button. The sidebar on the left contains navigation links: Dashboard, PM Form, PM Form Summary, Employee Master, KPI Master, Competency Master, Reference Master, Reports, User Management, Login As, Scheduled Jobs, Workflow Administration, and System Settings. The main content area is titled 'Administrator — Login As' and features an 'Administrator Verification' section. This section prompts the user to 'Enter the secondary verification password to continue. This is separate from your account password and is required before any user list is shown.' Below this text is a 'VERIFICATION PASSWORD' label, a text input field, and a 'Continue' button. At the bottom of the page, a footer note states: '© 2026 Apex Corporation — Demo Environment. All data shown is fictional.'

Login As — verification gate and recent impersonation history.

9. Workflow Administration

The recovery console for exceptional situations a normal manager/employee/HR flow cannot handle — a manager who has left, a wrongly approved review, a stuck workflow, a failed notification.

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Administrator (admin)Sign out

Performance Management System — Administrator Guide

Dashboard

PM Form

PM Form Summary

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Workflow Administration

System Settings

Workflow Administration

Search Appraisals

EMPLOYEE CODE

EMPLOYEE NAME

DEPARTMENT

MANAGER

REVIEW YEAR

STATUS

All Departments

All Managers

(All)

All Statuses

Apply

567 appraisal(s) found

EMPLOYEE	DEPARTMENT	MANAGER	REVIEW YEAR	CURRENT STAGE	CURRENT OWNER	LAST UPDATED	STATUS	ACTIONS
1147 - Anita Gupta	Information Technology	Amit Kumar	2026	Manager Review	Manager	20/12/2026 12:00	Employee Acknowledged	<button>View Workflow</button>
1052 - Karim Mansour	Underwriting	James Johnson	2026	Manager Review	Manager	20/12/2026 12:00	Employee Acknowledged	<button>View Workflow</button>
1038 - Kofi Diallo	Sales & Distribution	David Wang	2026	Manager Review	Manager	20/12/2026 12:00	Employee Acknowledged	<button>View Workflow</button>
1091 - Meera Chatterjee	Customer Service	Anita Singh	2026	Manager Review	Manager	20/12/2026 12:00	Employee Acknowledged	<button>View Workflow</button>
1171 - Vikram Mehta	Claims Management	Hans Muller	2026	Manager Review	Manager	20/12/2026 12:00	Employee Acknowledged	<button>View Workflow</button>
1110 - Adaeze Mutua	Investments & Treasury	Grace Liu	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>
1020 - Ahmed Khan	Legal & Compliance	Maria Garcia	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>
1140 - Ahmed Rahman	Investments & Treasury	Grace Liu	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>
1078 - Aisha Eze	Internal Audit	Zola Nwosu	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>
1148 - Ali Farouk	Legal & Compliance	Jose Martinez	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>
1028 - Ali Rahman	Operations	Priya Patel	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>
1088 - Amanda Baker	Legal & Compliance	Jose Martinez	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>
1105 - Amanda White	Actuarial Services	Emily Clark	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>
1134 - Amara Adeyemi	Risk Management	Chidi Adeyemi	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>
1014 - Amara Mensah	Finance & Accounting	Omar Hassan	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>
1196 - Amina Haddad	Customer Service	Jason Zhang	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>
1166 - Amina Kamau	Customer Service	Jason Zhang	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>
1076 - Amina Nasser	Customer Service	Jason Zhang	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>
1046 - Amina Osei	Customer Service	Jason Zhang	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>
1139 - Amit Singh	Corporate Strategy	David Lewis	2026	Completed	—	15/12/2026 12:00	Approved	<button>View Workflow</button>

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Workflow Administration — search across every review by employee, department, manager, year, or status.



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99+

Administrator (admin)

Sign out

Workflow Details — Lars Nowak

Employee Information

EMPLOYEE INFORMATION

Employee Code **1143**

Employee **Lars Nowak**

Review Year **2026**

REPORTING STRUCTURE

Department **Sales & Distribution**

Manager **Raj Sharma**

Current Workflow Status

✓ Manager KPIs — ✓ Employee Ack — ✓ Manager Review — ✓ HR Review — ● Completed

Current Stage **Completed** Current Owner — Status **Approved**

Started Date **20/01/2026** Last Updated **15/12/2026 12:00** Completed Date **15/12/2026**

Workflow Timeline

DATE	USER	PREVIOUS STAGE	NEW STAGE	ACTION TAKEN / COMMENTS
20/01/2026 12:00	1011	Draft	Pending Employee Acknowledgment	Send to Employee
10/02/2026 12:00	1143	Pending Employee Acknowledgment	Employee Acknowledged	Employee acknowledged
05/12/2026 12:00	1011	Employee Acknowledged	Submitted to HR	Submitted to HR
10/12/2026 12:00	1016	Submitted to HR	HR Review 1 Approved	HR review 1 approved
15/12/2026 12:00	1017	HR Review 1 Approved	Approved	Final HR approval
15/12/2026 12:00	admin	Approved	Approved	Admin: unlocked — Employee needs to correct a typo in one field.

Audit History

TIMESTAMP	USER	ACTION	DETAILS
15/12/2026 12:00	admin	Workflow Administration: Resend Notification	Reason: Employee reported the confirmation email never arrived.; Previous: Approved; New: Approved;
15/12/2026 12:00	admin	Workflow Administration: Unlock Review	Reason: Employee needs to correct a typo in one field.; Previous: Approved; New: Approved;

Administrative Actions

Return to Employee

Return to Manager

Reopen Review

Not available — this appraisal is not currently with HR for review.

Resend Notification

Administrative Completion

Unlock Review

Not available — this review is already completed.

Not available — this form is already unlocked.

Workflow Administration Details — status tracker, full timeline, audit history, and the six recovery actions.

ACTION	VALID FROM	EFFECT
Return to Employee	Anything past KPI Creation	Performance Management System — Administrator Guide Sends back to Employee Acknowledgement; clears prior acknowledgement; re-locks the form.
Return to Manager	Submitted to HR / HR Review 1 Approved	Sends back to Manager Review so scores can be corrected.
Reopen Review	Completed only	Reopens for editing; clears both HR reviewers' sign-offs (they must re-approve).
Resend Notification	Any actionable status	Re-sends the current stage's email using the exact same template — no duplicate-template risk.
Administrative Completion	Anything not already Completed	Marks the review Completed directly. Still runs the full same data-completeness validation as a normal submission — cannot be used to force through an incomplete review.
Unlock Review	Currently locked	Unlocks without changing the stage — for a single-field correction that doesn't warrant rewinding the whole workflow.

Every action requires a typed reason (minimum 10 characters) and a confirmation dialog, and produces one audit-log entry recording the administrator, reason, previous state, new state, and IP address.

10. Backups & the health endpoint

`GET /health` is an unauthenticated endpoint that returns healthy only if the application can actually reach its database — point your load balancer's or monitoring system's health check here.

There is no automated backup job built into the application itself — back up the PostgreSQL database at the infrastructure level (recommended: nightly `pg_dump` , retained 30+ days). Full guidance, including retention policy for the audit/email logs, is in `docs/operations.md` and the Deployment Guide.

11. Deployment notes

SINGLE-NODE DESIGN

This application is built for a single running instance. Session state and the job scheduler are both in-process. Do not run multiple replicas without first moving to a distributed cache/clustered job store — otherwise scheduled jobs (including annual form generation and reminder emails) would run once *per replica*.

See the Deployment Guide for the full environment-variable reference, HTTPS/reverse-proxy setup, and production checklist.

12. Troubleshooting

SYMPTOM	WHERE TO LOOK
A user can't sign in	Check <code>LockedOutUntil</code> via User Management (or wait out the lockout window); confirm the account is Active.
Emails aren't arriving	Settings → Email → Send Test Email; check Development Redirect Email isn't accidentally set; check SMTP credentials haven't expired.
A scheduled job didn't run	Scheduled Jobs page shows last run status/error; use Run Now to retry manually.
A review is "stuck"	Workflow Administration → find the review → use the appropriate recovery action with a clear reason.
Unexpected error page	The generic Error page shows a request ID — correlate with server-side logs/audit trail for that timeframe.