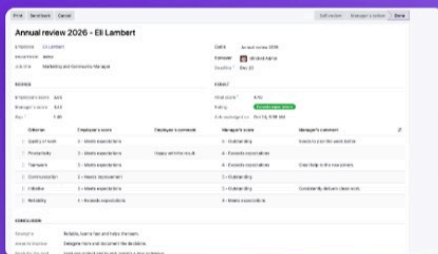


Performance Reviews

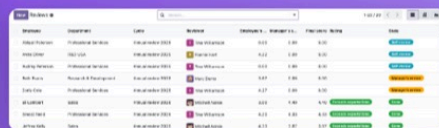
A guide to performance reviews: the cycle and its criteria, the self-review, the manager's review, the result, the analysis, privacy by design and the access rights.

1. Start here

In plain words: Once a year somebody sends a spreadsheet to every manager and chases the answers by email. **Performance Reviews** runs the whole cycle in Odoo: you define the **criteria and their weights**, create the **reviews of all your employees in one click**, the employee **scores themselves**, the manager **scores the same criteria** and writes the conclusion, and the employee **reads and acknowledges** the result. Scores are weighted, rated, printed and analysed by department.

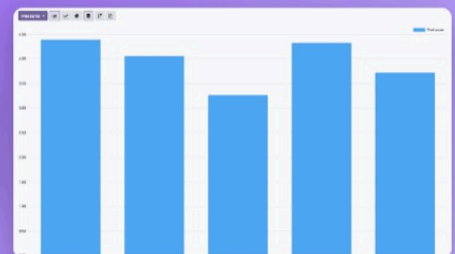


Scores, rating and conclusion



Employee	Department	Date	Review	Score	Status
John Doe	Department A	2026-01-01	Self-review	4.5	Completed
Jane Smith	Department B	2026-01-01	Self-review	4.0	Completed
Bob Brown	Department C	2026-01-01	Self-review	3.5	Completed
Charlie Green	Department D	2026-01-01	Self-review	4.2	Completed
Alice White	Department E	2026-01-01	Self-review	4.8	Completed

Every review at a glance



Average by department

The finished review, the list of all reviews and the average by department.

Tip: The process is blind on purpose: the manager does not see the self-review before it is sent, and the employee does not see the manager's scores before the review is finished.

2. What you get

Feature	What it does
Review cycle	A period, a deadline, the criteria with weights, the departments concerned, and an HR responsible. Six usual criteria are proposed.
One click	Creates a review for each employee (or those of the chosen departments), with the manager as the reviewer.
Self-review	The employee scores each criterion from 1 to 5 and comments. Optional per cycle.
Manager's review	The manager scores the same criteria, writes the strengths, the areas to improve, the goals of the next period and a conclusion.
Weighted scores and rating	A score for the employee and one for the manager, the gap between them, and a rating from Outstanding to Unsatisfactory.
Acknowledgement	The employee reads the result, comments and confirms with one button.
Privacy by design	Record rules hide the self-review from the manager until it is sent, and the manager's review from the employee until it is finished.
Activities	Each step is an activity for the person who has to act, with the deadline of the cycle.
Print and analyse	A printable review; pivot and graph by department, cycle, reviewer and rating.
Arabic	Everything is translated and works right to left.

3. Requirements

Item	Details
Odoo	19.0 (Community or Enterprise)
Apps needed	Employees (<code>hr</code>)
License	OPL-1 (Odoo Proprietary License v1.0)

4. Install

- 1 Unzip the package. Inside is `taqnix_performance_review.zip` ; unzip it to get the folder `taqnix_performance_review` .
- 2 Copy the folder into one of the `addons_path` folders of your Odoo server and restart Odoo.
- 3 Log in as an administrator, activate **Developer mode**, open **Apps** and press **Update Apps List**.
- 4 Remove the "Apps" filter, search **Performance Reviews** and press **Install**.

```
# or from the command line
./odoo-bin -c odoo.conf -d YOUR_DATABASE -i taqnix_performance_review --stop-after-init
```

5. Make a review cycle

In plain words: **Employees** → **Performance** → **Review cycles** → **New**. Give it a name, the **period** under review and a **deadline**. Keep or edit the six proposed **criteria** and give each a **weight**: a criterion with weight 2 counts twice as much. Choose the **departments** (empty means everybody), the HR responsible and whether employees write a **self-review**.

A review cycle with its criteria and weights.

In plain words: Press **Create the reviews:** one review per employee appears, each with its reviewer (the employee's manager, else the department manager, else the HR responsible) and an activity for the first person to act. Press it again later to add the employees who joined since.

Employees

Employees

Departments

Onboarding

Performance

Learning

Reporting

Configuration

12

36

My Company

New

Reviews

Q

Search...

1-20 / 20

☐	Employee	Department	Cycle	Reviewer	Employee's ...	Manager's s...	Final score	Rating	State	
☐	Abigail Peterson	Professional Services	Annual review 2026	T Tina Williamson	0.00	0.00	0.00		Self-review	
☐	Anita Oliver	R&D USA	Annual review 2026	R Ronnie Hart	4.22	0.00	0.00		Self-review	
☐	Audrey Peterson	Professional Services	Annual review 2026	T Tina Williamson	0.00	0.00	0.00		Self-review	
☐	Beth Evans	Research & Development	Annual review 2026	MD Marc Demo	3.67	0.00	0.00		Manager's review	
☐	Doris Cole	Professional Services	Annual review 2026	T Tina Williamson	4.27	0.00	0.00		Manager's review	
☐	Eli Lambert	Sales	Annual review 2026	MA Mitchell Admin	3.00	4.40	4.40	Exceeds expectations	Done	
☐	Ernest Reed	Professional Services	Annual review 2026	T Tina Williamson	4.20	4.33	4.33	Exceeds expectations	Done	
☐	Jeffrey Kelly	Sales	Annual review 2026	MA Mitchell Admin	4.33	3.87	3.87	Exceeds expectations	Done	
☐	Jennie Fletcher	Research & Development	Annual review 2026	MD Marc Demo	4.20	2.67	2.67	Meets expectations	Done	
☐	Keith Byrd	Research & Development	Annual review 2026	R Ronnie Hart	4.73	2.87	2.87	Meets expectations	Done	
☐	Layla Hassan	Research & Development	Annual review 2026	MD Marc Demo	4.00	4.00	4.00	Exceeds expectations	Done	
☐	Marc Demo	Research & Development	Annual review 2026	MA Mitchell Admin	3.27	3.00	3.00	Meets expectations	Done	
☐	Omar Farouk	Sales	Annual review 2026	MD Marc Demo	4.13	4.67	4.67	Outstanding	Done	
☐	Paul Williams	Long Term Projects	Annual review 2026	MD Marc Demo	4.27	4.40	4.40	Exceeds expectations	Done	
☐	Rachel Perry	Sales	Annual review 2026	MA Mitchell Admin	3.00	4.40	4.40	Exceeds expectations	Done	
☐	Randall Lewis	Research & Development	Annual review 2026	MD Marc Demo	4.60	4.07	4.07	Exceeds expectations	Done	
☐	Ronnie Hart	Research & Development	Annual review 2026	MD Marc Demo	3.20	3.00	3.00	Meets expectations	Done	
☐	Toni Jimenez	Professional Services	Annual review 2026	T Tina Williamson	4.60	3.80	3.80	Exceeds expectations	Done	
☐	Walter Horton	Research & Development	Annual review 2026	MD Marc Demo	3.87	3.27	3.27	Meets expectations	Done	
☐	Amy Watson		تقييم منتصف العام	S Salma Khalid	4.82	3.73	3.73	Exceeds expectations	Done	

All the reviews of the cycle, by status.

6. The employee: self-review

In plain words: The employee opens **Employees → Performance → My reviews** (or the activity), gives a score from 1 to 5 to each criterion, comments where useful and presses **Send my self-review**. All the criteria must have a score. Once sent, it cannot be edited.



In plain words: The manager now sees the review with the employee's scores, scores the **same criteria**, writes the **strengths**, the **areas to improve**, the **goals for the next period** and a **conclusion**, and presses **Finish the review**.

EmployeesDirectoryDepartmentsOnboardingPerformance

My reviews

Search...

1-3 / 3

Employee	Department	Cycle	Reviewer	Employee's ...	Manager's s...	Final score	Rating	State
☐ Doris Cole	Professional Services	Annual review 2026	T Tina Williamson	4.27	0.00	0.00		Manager's review
☐ Ernest Reed	Professional Services	Annual review 2026	T Tina Williamson	4.20	4.33	4.33	Exceeds expectations	Done
☐ Toni Jimenez	Professional Services	Annual review 2026	T Tina Williamson	4.60	3.80	3.80	Exceeds expectations	Done

The reviews of a manager.

The manager's review, with the employee's scores beside.

In plain words: The review is **Done**: the **final score** is the manager's weighted score, with a **rating** (4.5 and above Outstanding, 3.5 Exceeds expectations, 2.5 Meets expectations, 1.5 Needs improvement, below that Unsatisfactory). The **gap** between the manager's and the employee's score shows where perceptions differ. The employee gets an activity to read the review, comment and press **I have read my review**.

Employees

Employees

Departments

Onboarding

Performance

Learning

Reporting

Configuration

12

36

My Company

New

Reviews

Annual review 2026 - Eli Lambert

1 / 1

Print

Send back

Cancel

Self-review

Manager's review

Done

Annual review 2026 - Eli Lambert

Employee

Eli Lambert

Department

Sales

Job title

Marketing and Community Manager

Cycle

Annual review 2026

Reviewer

Mitchell Admin

Deadline

Dec 20

SCORES

Employee's score

3.00

Manager's score

4.40

Gap

1.40

RESULT

Final score

4.40

Rating

Exceeds expectations

Acknowledged on

Oct 24, 9:36 AM

Criterion	Employee's score	Employee's comment	Manager's score	Manager's comment
Quality of work	3 - Meets expectations		5 - Outstanding	Needs to plan the week better.
Productivity	3 - Meets expectations	Happy with the result.	4 - Exceeds expectations	
Teamwork	3 - Meets expectations		4 - Exceeds expectations	Great help to the new joiners.
Communication	2 - Needs improvement		5 - Outstanding	
Initiative	3 - Meets expectations		5 - Outstanding	Consistently delivers clean work.
Reliability	4 - Exceeds expectations		3 - Meets expectations	

CONCLUSION

Strengths

Reliable, learns fast and helps the team.

Areas to improve

Delegate more and document the decisions.

Goals for the next period

Lead one project end to end; mentor a new colleague.

Conclusion of the

A solid year. Keep the momentum.

A finished review.



My Company
8000 Marina Blvd, Suite 300
Brisbane, CA 94005
United States

Performance review

Employee: Eli Lambert
Job title: Marketing and Community Manager
Department: Sales

Cycle: Annual review 2026
Period: 01/01/2026 - 12/31/2026
Reviewer: Mitchell Admin

Criterion	Employee	Manager	Manager's comment
Quality of work	3	5	Needs to plan the week better.
Productivity	3	4	
Teamwork	3	4	Great help to the new joiners.
Communication	2	5	
Initiative	3	5	Consistently delivers clean work.
Reliability	4	3	
Weighted score	3.00	4.40	Exceeds expectations

Strengths

Reliable, learns fast and helps the team.

Areas to improve

Delegate more and document the decisions.

Goals for the next period

Lead one project end to end; mentor a new colleague.

Conclusion of the manager

A solid year. Keep the momentum.

Comment of the employee

Thank you, I agree with the goals.

Employee

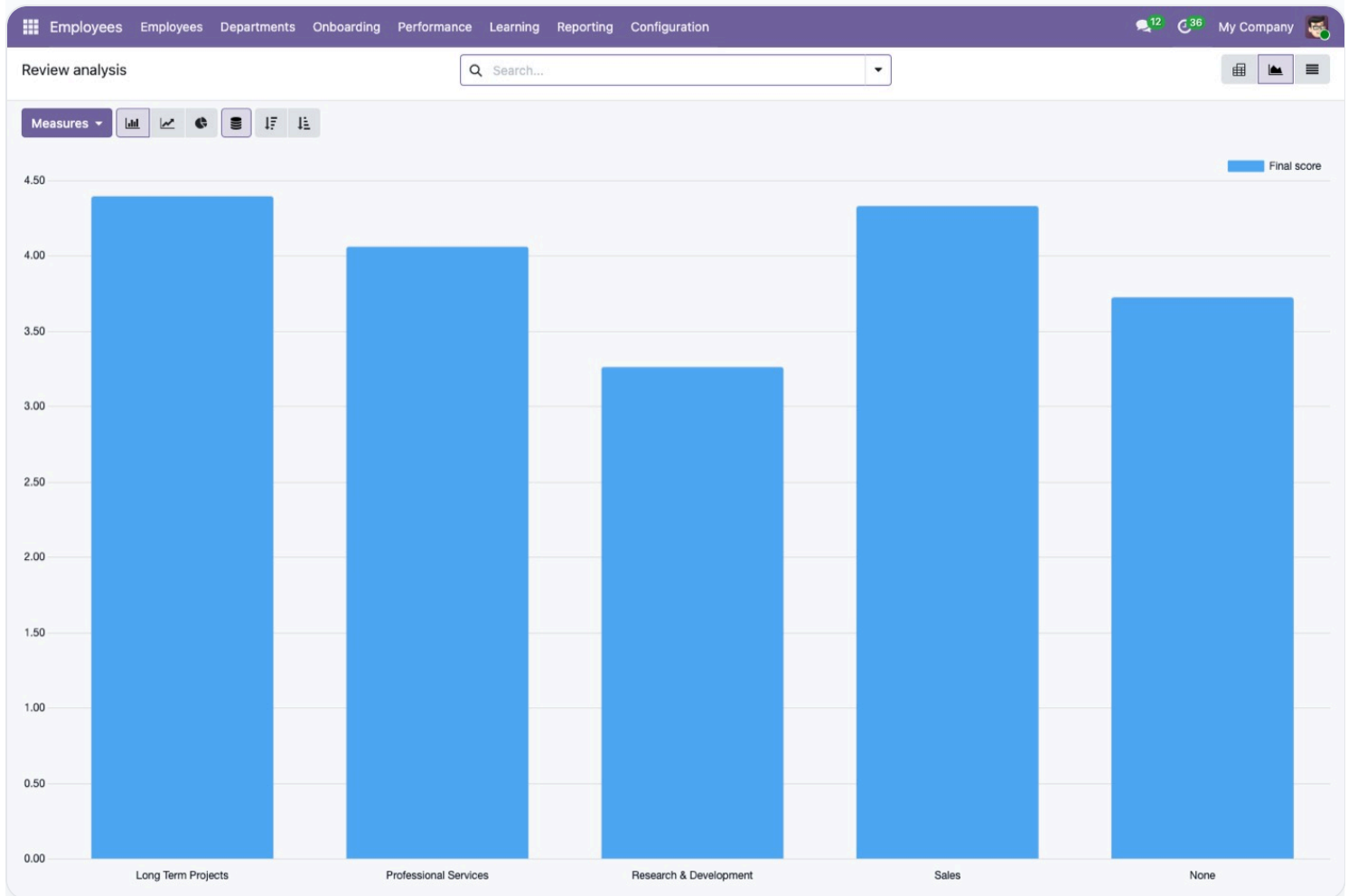
Reviewer

123456789 info@yourcompany.com <http://www.example.com>

The printed review.

9. Analyse

In plain words: Employees → Performance → Analysis (HR): the finished reviews as a pivot and a graph, grouped by department, cycle, reviewer or rating, with the average final score.



The average final score by department.

10. HR corrections

In plain words: HR can **send back** a review one step (finished to manager, manager to self-review), **cancel** it and **restart** it, and change the reviewer. A cycle can be **closed** when it is over and **reopened**.

11. Who can do what

Who	Can
HR officers	Make cycles, create and see all reviews, change reviewers, send back, cancel, analyse.
The employee	See and write their own review while it is a self-review, and read it once it is finished; comment and acknowledge.
The reviewer (manager)	See the review once the self-review is sent; write the manager's scores and the conclusion.
Everybody else	See nothing of the reviews of others.

12. Arabic and right to left

A review in an Arabic interface, with Arabic criteria.

Limit	Detail
Scale 1 to 5	The scale and the rating thresholds are fixed.
One review per employee and cycle	Create another cycle for a mid-year check.
Not a legal record	Keep your own policy on how the review is used in decisions about pay or promotion.
Employees without a user	They cannot write a self-review: HR can do it for them, or the cycle can skip the self-review.

14. For developers

In plain words: Skip this chapter if you only use the module.

```
cycle = env['taqnix.review.cycle'].create({'name': 'Annual review 2026', 'date_start': '2026-01-01', 'date_end': '2026-12-31', 'criterion_ids': [(0, 0, {'name': 'Quality'})]})
cycle.action_generate() # one review per employee, the manager as reviewer
review = cycle.review_ids[0]
review.line_ids.write({'self_score': '4'})
review.action_submit_self() # then the manager scores and calls action_submit_manager
review.final_score, review.rating
```

15. Troubleshooting

Problem	What to do
The manager does not see a review	The self-review is not sent yet: the manager sees the review once the employee sends it.
Give a score to every criterion	One of the criteria has no score.
The employee has no manager	The department manager or the HR responsible of the cycle is the reviewer.
I do not see Performance	It is under Employees: everybody sees My reviews, HR officers see the rest.

16. Updating and removing

Replace the folder with the new version, restart Odoo and run `-u taqnix_performance_review`. The cycles and the reviews are kept.

17. Support

Installation help and bug fixes are included for 6 months, with lifetime updates. Contact us through the marketplace page where you bought the module or write to **support@taqnix.com** with your Odoo version and a screenshot.

Changelog

1.0.0 – Initial release

- Review cycles with weighted criteria, period, deadline and departments; six criteria proposed
- One click creates the reviews, with the manager as reviewer
- Self-review then manager's review: scores 1 to 5, comments, strengths, areas to improve, goals, conclusion
- Weighted scores, gap, rating, employee acknowledgement
- Blind process through record rules; activities for each step
- Printable review, pivot and graph analysis, Arabic translation, automated tests