

INSPIRE Performance Admin Checklist



1. Setup Your Groups

A. Navigate to Admin > Group Management

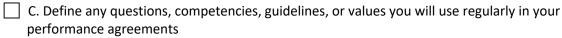
B. Create Named groups and assign appropriate users (Static: Group of specific users, Dynamic: Group of users based on attributes that automatically updates)



2. Setup Performance

A. Navigate	to Admin :	> Agreement	Setup

B. Define the grade scales you will use





D. Define the default grade scale you would like to use for objectives

E. Review the notifications (recommend not changing them for now)



3.	Setup Performance Cycle		
	A. Navigate to Admin > Cycle Management > Cycles		
	B. Select Add Cycle		
	Define cycle title & description		
	Cycle Start and End dates (Bookends for the full cycle)		
	Enable/Disable competency selection		
	Enable/Disable mid-cycle comments		
	C. Setup Performance Agreement, 1-1 Execution, Self-Assessment, Appraisal		
	Enable/Disable each section		
	Define end dates for each section (start dates are based on cycle dates and previous steps)		
	Define if comments are required		
	C. Setup Sub-Categories		
	Enable/Disable Sub-Category sections		
	Setup named sub-categories for HR (assigned to competencies and shared measures during the cycle setup process)		
	Setup named sub-categories for Objectives (assigned to objectives during the agreement process)		
	D. Setup Questionnaire & Guidelines		
	Enable/Disable each section		
	Select or Add New items for each section		
	E. Setup Grades		
	Enable/Disable each section		
	Select or Add New items for each section		
	If enabled, define grade scale for each section		



F. Setup Weighting				
Enable/Disable weighting				
If enabled, add weighted groups (provide group name, search, and select previously defined groups, enter weighting for each available graded section)				
G. Participants				
If weighting is enabled, select quick link to "Add all users from weighted groups" to the participants list				
If applicable, add additional user to participate (weighting for individuals can be adjusted by selecting the gear icon next to the user's name once they are added)				
H. Select "Save"				

4. Review and Set Cycle to Active

A.	Re

A. Review the cycle for accuracy

B. Set the cycle to active from the admin > Cycle Management > Cycles page or when editing the specific cycle. (Once active users will be able to access the cycle)

Best practice: Try to minimize edits to cycles mid-performance period. This will ensure that reporting and data is as accurate as possible.

C. Notifications will be sent to cycle participants once the cycle is active