INSPIRE

Performance Admin Checklist

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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
- ☐ C. Define any questions, competencies, guidelines, or values you will use regularly in your performance agreements
- ☐ 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. 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