# Inspira 9.2 e-Performance User Guide

This user guide provides step-by-step instructions for the e-Performance process in Inspira.

#### **GETTING STARTED**

# LOGGING IN TO INSPIRA FOR THE FIRST TIME

- a. Please select Google Chrome or Mozilla Firefox as your web browser, as Internet Explorer 9 does not support this application.
- b. Go to <a href="https://inspira.un.org">https://inspira.un.org</a>
- c. Enter your index number as your User ID
- d. In the password field, enter your year of birth followed by the first four letters of your last name in capital letters. For example, 1973GONZ.
- e. Click Login
- f. You will then be prompted to change your password.



#### **PROCESS OVERVIEW**

The performance management process consists of three main phases: creating a workplan, conducting a midpoint review, and completing the end-of-cycle evaluation. The nine steps in this process are outlined below.

Acronym and Color Key: SM = Staff Member, FRO = First Reporting Officer, SRO = Second Reporting Officer

#### **PHASE 1: WORKPLAN**

- 1. Create Workplan (SM)
- **2. Approve Workplan** (FRO)

#### **PHASE 2: MID-POINT REVIEW**

- **3. Enter Mid-Point Comments**(SM)
- 4. View SM Comments & Enter Comments (FRO)
- **5. Finalize Mid-Point Review** (FRO)

#### PHASE 3: END-OF-CYCLE EVALUATION

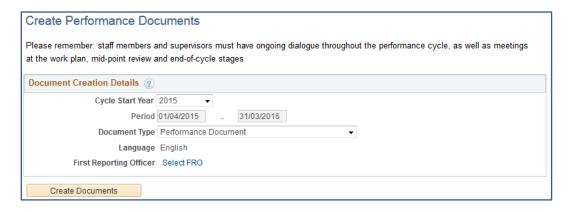
- 6. Self-Evaluation (SM)
- **7. Evaluation** (FRO)
- **8. Approve Evaluation** (SRO)
- 9. Acknowledge Evaluation (SM)

#### **PHASE 1: WORKPLAN**

## **Step 1. Create Workplan (SM)**

# **Create the Performance Document (SM)**

- a. Navigate to *Main Menu >Self Service> Performance Management >My Performance Documents>*Create Document
- b. Click the Cycle Start Year and select the appropriate year
- c. Click the Document Type and select Performance Document
- d. Click Select FRO



- e. In the **Person Search** box, enter the FRO's name and click Search
- f. Select the FRO's name and click OK



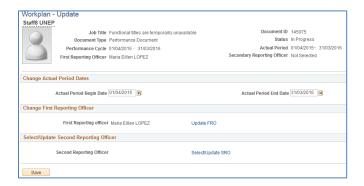
g. Click Create Documents on the Create Performance Documents page

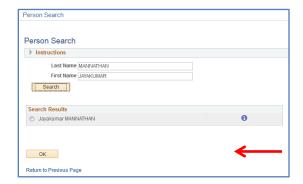
# Adding the SRO and updating the actual period

a. Click on the 'Change Actual Period/FRO/SRO' link in the Steps and Tasks column

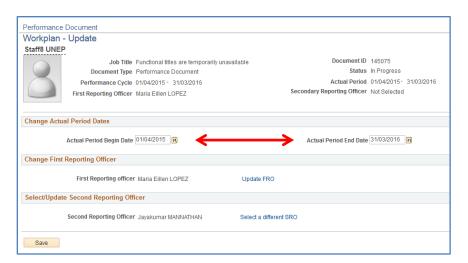


b. Click the <u>Select/Update SRO</u> link to add or change the name of the second reporting officer, then search by entering his/her name in the **Person Search** box. Click ok.





c. If the dates of your evaluation period differ from the performance cycle dates, update the 'Actual Period' dates, then click on 'Save'.



# **Entering the Workplan**

a. In the Steps and Tasks column on the left hand side of the page, click Update under Workplan



Expand **Section 1**, and then click on the Add Goals link. Insert a goal description (title), related actions and success criteria then click the button.

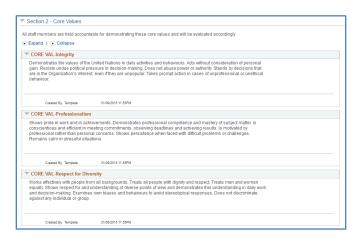


- b. To add additional goals repeat steps b. d.
- c. When you are finished adding your goals, click

Save

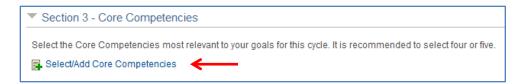
#### **Review Core Values**

a. In **Section 2**, click Expand to view all details and review the core values that apply to all staff

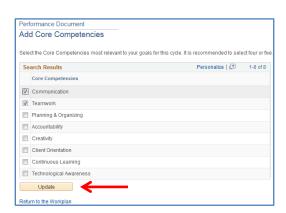


### **Add Core and Managerial Competencies**

a. In Section 3, click on



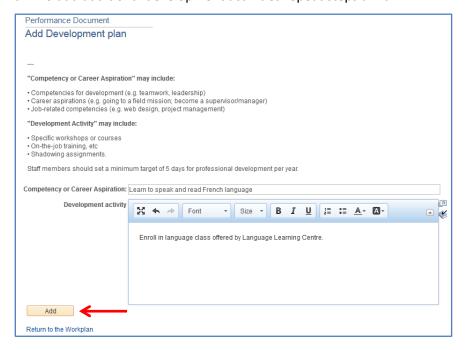
- b. Select the core competencies most relevant for this performance cycle
- c. Click Update



d. In **Section 4**, click on Select/Add Managerial Competencies . Select the managerial competencies most relevant for this performance cycle and then click on the

#### **Add Your Development Plan**

- a. In **Section 5,** click on the Add Development plan link.
- In the Competency or Career Aspiration box, enter your development objective. In the
   Development Activity box, enter the activity to support the objective.
- c. Click Add
- d. To add additional development activities repeat steps a. d.



- e. When you have completed your work plan, click
- f. Click to inform your supervisor that it is ready for approval.

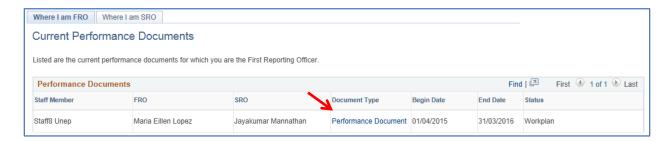
**Note:** This action will trigger an automatic email to the supervisor informing them that the workplan has been created and is pending their approval.

#### PHASE 1: WORKPLAN

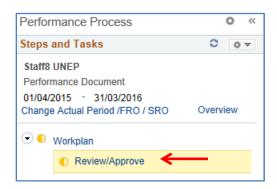
#### **Step 2. Approve Workplan (FRO)**

Navigate to: *Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents* 

a. From the Where I am FRO tab, click <u>Performance Document</u> in the row that corresponds to the staff member and performance cycle you wish to review.



b. In the Steps and Tasks column on the left hand side of the page, click Review/Approve under Workplan



- c. Click Expand All to view all details in the workplan
- d. Review Sections 1- 5 of the work-plan. When you are finished, click

  Confirm

  If changes are required, click on Return to SM

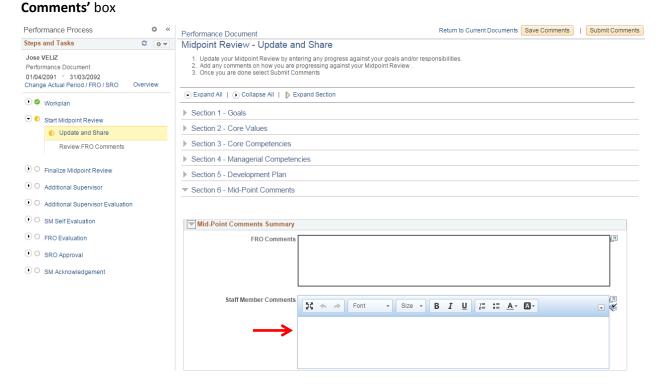
#### **PHASE 2: MID-POINT REVIEW**

### 3. Enter Mid-Point Comments(SM)

- a. Click Main Menu > Self Service > Performance Management > My Performance Documents >
   Current Documents
- Click <u>Performance Document</u> in the row that corresponds to the performance dates you wish to review.



c. Scroll down to **Section 6 – Mid-Point Comments** and enter your comments in the '**Staff Member** 



When you are finished entering your comments, click on Save Comments

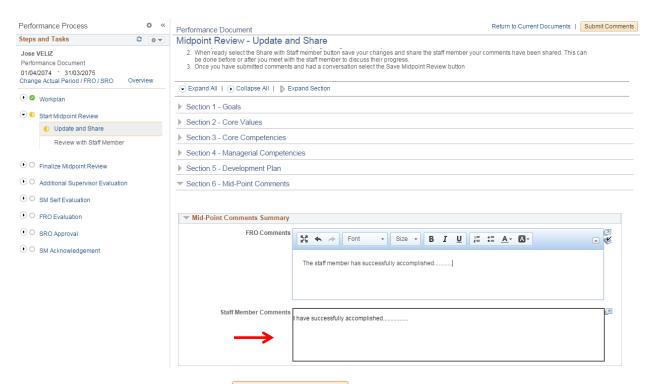
d. Click on Submit Comments to submit the comments to your FRO

#### **PHASE 2: MID-POINT REVIEW**

- 4. View SM Comments & Enter Comments (FRO)
- a. Click Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents
- b. In the Where I am FRO tab, click <u>Performance Document</u> in the row that corresponds to the staff member and performance cycle you wish to review.



c. Scroll down to **Section 6 – Mid-Point Comments** at the bottom of the page to review the staff member's comments and enter your comments in the FRO **Comments box.** 



d. When you are finished, click on

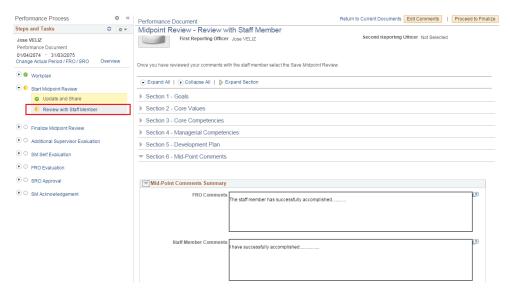
Submit Comments

#### **PHASE 2: MID-POINT REVIEW**

# 5. Finalize Mid-Point Review (FRO)

a. In the Steps and Tasks column on the left hand side of the page, click on the 'Review with Staff

Member' link, then click on the Proceed to Finalize button.



b. Click on the **'Update and Complete'** link, then click on the button.



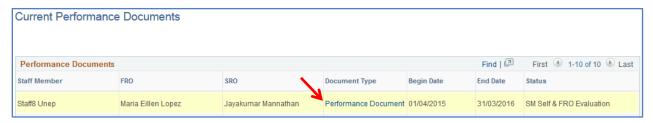
c. The midpoint review has now been finalized.

#### Phase 3. END-OF-CYCLE EVALUATION

# **Step 6. Self-Evaluation (SM)**

Navigate to: Main *Menu > Self Service > Performance Management > My Performance Documents > Current Documents* 

 a. Click <u>Performance Document</u> in the row that corresponds to the performance dates you wish to review.



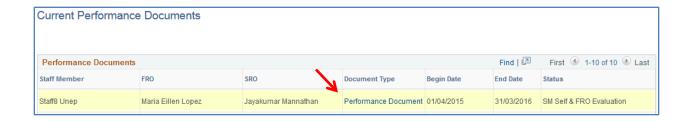
- b. Click on 'Expand All' to view all sections of the workplan.
- c. Enter your comments in sections 1-7 when applicable.
- d. When you are finished, click on Save and then Complete



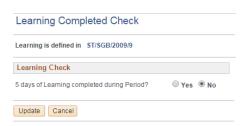
#### PHASE 3: END-OF-CYCLE EVALUATION

#### Step 7. Evaluation (FRO)

- a. Navigate to: *Main Menu > Self Service > Performance Management > My Performance Documents*> Current Documents
- b. Click <u>Performance Document</u> in the row that corresponds to the cycle you wish to review.



c. Click on the 'Learning Completed' link in the left hand column and indicate (yes or no) whether the staff member completed his/her 5 days of learning.



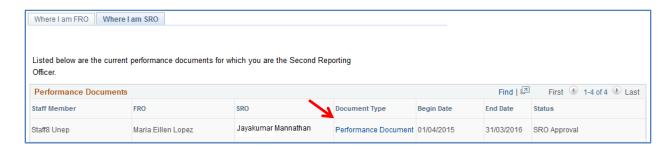
- d. Click on 'Expand All' to view all sections of the workplan
- e. Enter your ratings and comments in Sections 1-7 (where applicable)
- f. When you are finished, click Save and then Submit to SRO for approval.



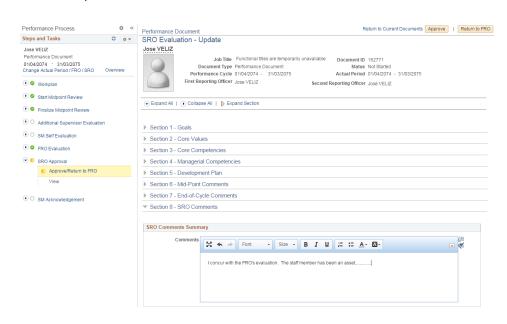
#### PHASE 3: END-OF-CYCLE EVALUATION

# 8. Approve Evaluation (SRO)

- a. Navigate to > Manager Self Service > Performance Management > Performance Documents > Current Documents
- b. In the where I am SRO tab, click <u>Performance Document</u> in the row that corresponds to the staff member and performance cycle you wish to review.



- c. Click on Expand All to view the ratings and comments of the FRO in sections 1-7
- d. Input your comments in Section 8 at the bottom of the page
- e. When you are finished, click Approve then



**Note:** If you want the FRO to make changes to the end-of-cycle evaluation, click approving it.

#### **PHASE 3: END-OF-CYCLE EVALUATION**

#### **Step 9. Acknowledge Evaluation (SM)**

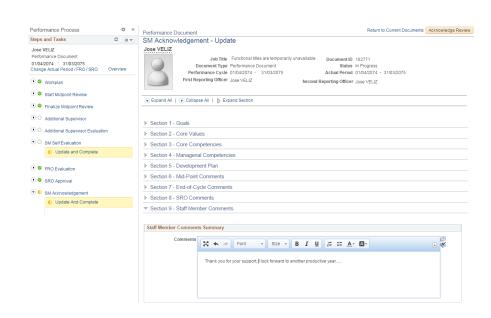
- a. Click Main Menu > Self Service > Performance Management > My Performance Documents >
   Current Documents
- Click <u>Performance Document</u> in the row that corresponds to the performance dates you wish to review.

**Current Performance Documents** 



- c. Review the FRO's evaluation and SRO's comments, then enter any additional overall comments you may have in Section 9 at the bottom of the page
- d. When you are finished, click

  Acknowledge Review then to acknowledge the evaluation.



**Note:** The option will be available in the **SM Acknowledgement** page as soon as the performance document is marked as completed. Please **remember** to <u>disable your browser's pop-up</u> blocker.